

# Our Webinar Will Begin Shortly

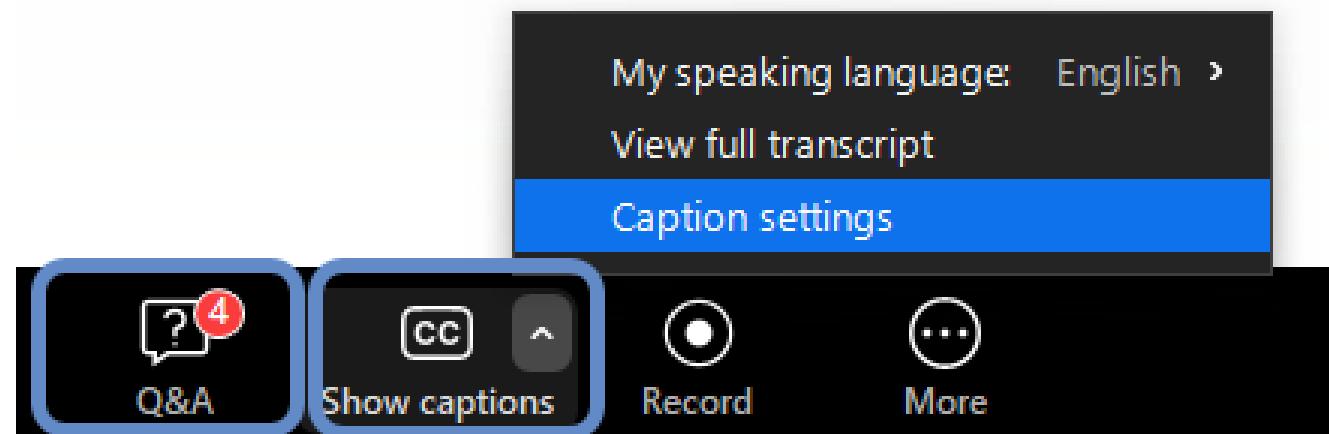
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# Accessibility Options

## Enabling Closed Caption

- This webinar is being recorded. We will email the recording and slides after the session.
- Your camera and mics are turned off.
- Q&A will be answered throughout the presentation. Please submit your questions in the Q&A box by selecting the Q&A button at the bottom of the screen to pop out this box.
- This webinar is Closed Caption enabled. Please proceed by selecting Show Captions option at the bottom of your screen to enable feature.



# Meet the Trainer!



## Alejandra Cordova



- **Role: Sponsored Provider Training Specialist**
- **Tenure at HHAeXchange: 3 years**
- **Areas of Expertise: Sponsored Training**
- **Fun Fact: I'm obsessed with Buc-ee's!**

# Mastering Data Entry

January 2026

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## Data Entry



This training covers the Recipient and Direct Care Worker (DCW) modules, focusing on how to manage records and information for both.

### **Who should take this training?**

Those whose role it is to enter data information regarding your Recipients and DCW records.

Alt EVV providers, will manage recipient and DCW/DCW records in their Alt EVV system which is then sent to Sandata EVV. For additional support on entering these records, please contact your Alt EVV vendor.

## Sandata Standard System Terminology

## Corresponding Terminology

### CONTRACT / PAYER

- FFS
- HHS
- MCO
- State
- Plan

### Recipient

- CDS Employer
- Consumer
- Patient
- Client
- Participant
- Beneficiary
- Individual

### DCW/Employee

- Aide
- Homecare Aid
- Homecare Worker
- Worker
- Direct Support Professionals (DCW)
- Service Provider
- Participant-directed provider
- Attendant
- Caregiver
- Non-Agency (Independent) Provider
- Direct care worker

### AGENCY / PROVIDER

- FMSA
- Vendor
- Program Provider
- Non-Agency (Independent) Provider
- Participant-directed Providers
- AGE-certified provider
- Agency provider

### COORDINATOR

- Care Coordinator
- Case Coordinator
- Service Coordinator
- Care Types
- Case manager

### UNITY NUMBER

- EMPI
- Master Patient Number
- Shared Patient Number

### SECONDARY IDENTIFIER

- MPI
- Promise Code

# Objectives of Today's Training

## You will be able to:

- Manage Recipient profiles.
- Locate and enable EVV settings in Sandata EVV.
- Filter and export data for recipient and DCW reporting (agency providers only).
- Manage DCW (agency providers only).
- Clock in and out using SMC or TVV.



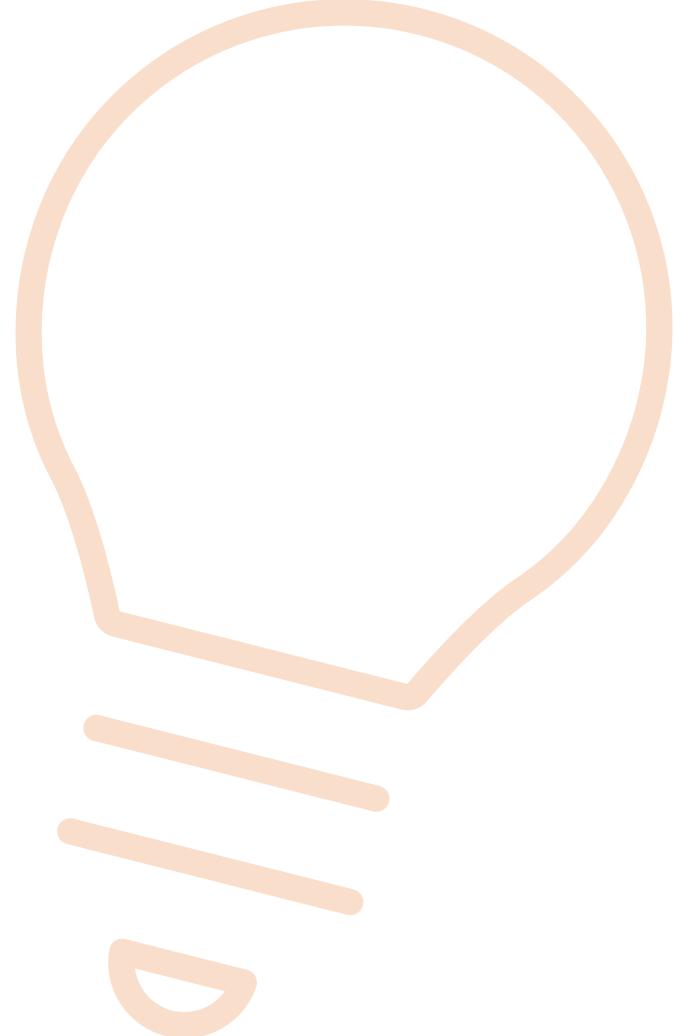
# Knowledge Checks

You'll see these throughout the presentation!



**What's the name of the presenter of this webinar?**

- A. George
- B. Alejandra
- C. Bill
- D. Ashley



# Agenda



- EVV Overview
- EVV Checkpoints
- Setting Up Recipient Profiles
- Visit Capture
- Creating DCW/Independent Provider Profiles (Agency Only)
- Key Takeaways
- Exporting Data
- Support Resources
- Q & A

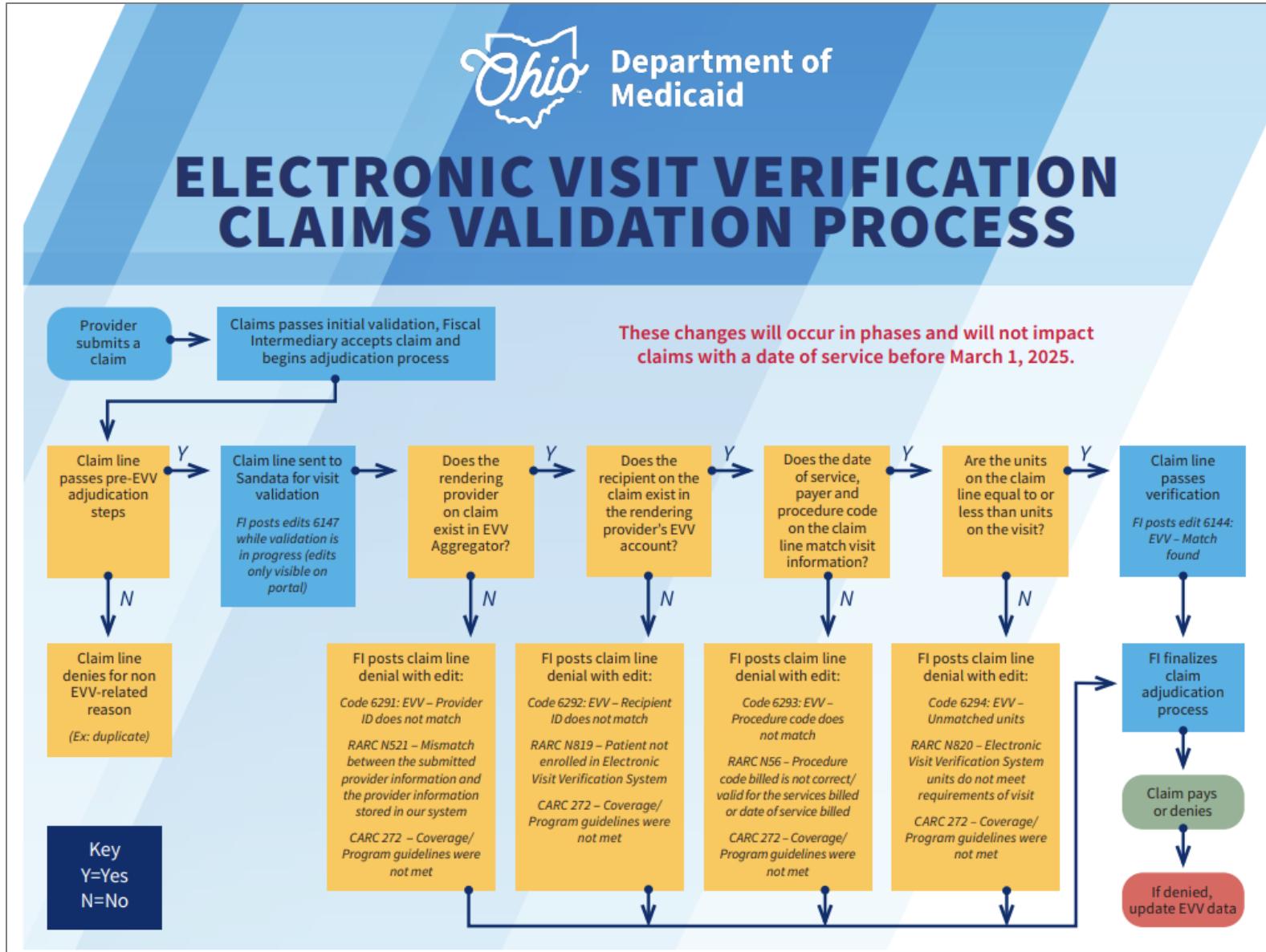
# EVV Claims Adjudication Phases



EVV Claims Adjudication Phases						
PHASE 1 March 1, 2025	PHASE 2 June 1, 2025	PHASE 3 June 1, 2025	PHASE 4 August 1, 2025	PHASE 5 October 1, 2025	PHASE 6 January 1, 2026	PHASE 7 March 1, 2026
	Billed to ODM FFS		Billed to Next Gen MCEs		Billed to DODD	Billed to ODM or AGE
HOME HEALTH SERVICES	PRIVATE DUTY NURSING, NURSE ASSESSMENT AND CONSULT	HOME HEALTH SERVICES	PRIVATE DUTY NURSING NURSE ASSESSMENT AND CONSULT	IO, Level 1, SELF WAIVER PROGRAM SERVICES	OHIO HOME CARE, PASSPORT WAIVER SERVICES	HOME HEALTH PDN, NURSE ASSESSMENT AND CONSULT, WAIVER SERVICES

*\*Based on claim line date of service.*

# Electronic Visit Verification Claims Validation Process





# List of Services MyCare Ohio Plans



- G0151
- G0152
- G0153
- G0156
- G0299
- G0300
- T1000
- T1001
- T1001\_U9
- S5125
- T1002
- T1003
- T1019
- T2025
- ECL

[ODM EVV Covered Programs and Services.pdf](#)

# EVV Overview

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# Electronic Visit Verification Overview



Under the 21st Century Cures Act, providers must use Electronic Visit Verification (EVV) for Medicaid-paid personal care and home health services.

DCW need to record their visits electronically to confirm services are done correctly.

The first part of this training will help you enter data for your Recipient and DCW accurately. This ensures visits are tracked, improves accountability, reduces errors, and helps your agency follow the rules.



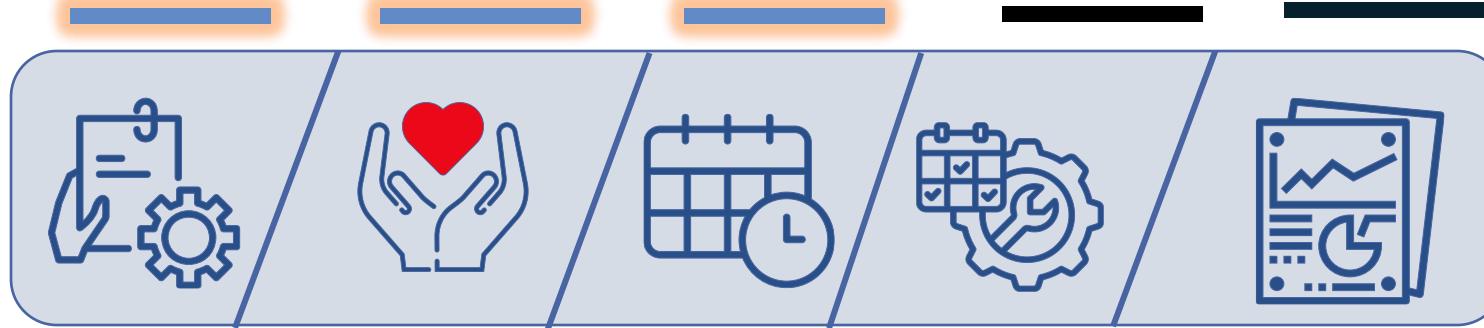
Recipient  
Setup &  
Management

DCW Setup &  
Management

Visit Capture

Visit  
Verification  
&  
Maintenance

Claims  
Validation  
&  
Payment



# Visit Capture



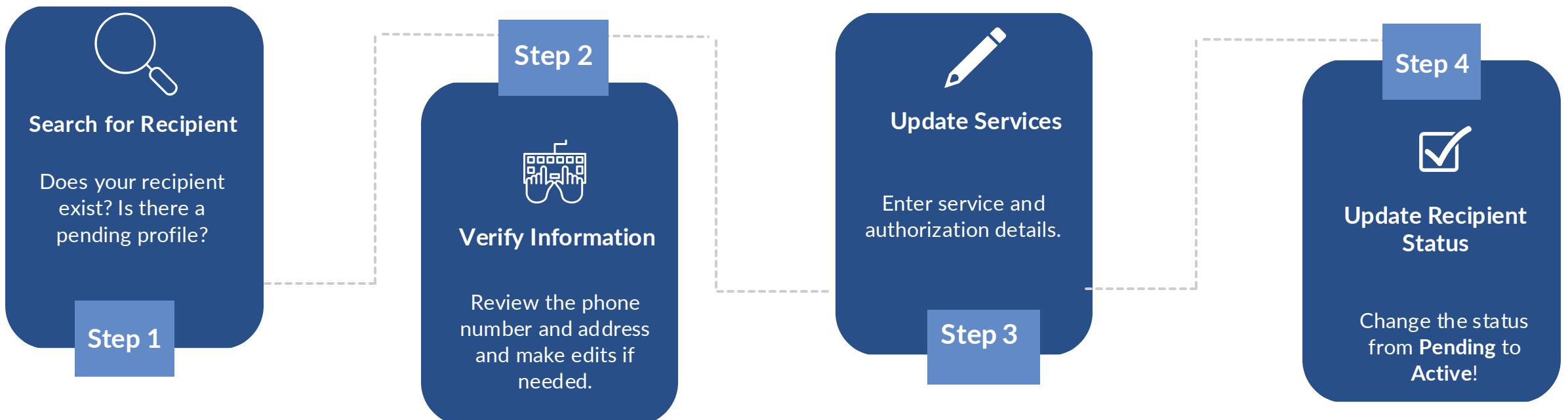
DCW/Independent Provider captures the visit using Sandata Mobile Connect (SMC) app, Telephonic Visit Verification (TVV), or provider manually creates visit.





# Setting up Recipient Profiles

# Steps to Setting up a Recipient





# Step 1: Verify Information

Does the recipient appear in list view? If NO:

1. Navigate to **Recipient > Recipient Management**
2. Select **Create Recipient**.
3. Toggle **ODA Only/No Medicaid ID** if no Medicaid ID available.
4. Fill in required fields, which include **Date of Birth (DOB)**, **Program**, **Payer**, and **Client Payer ID (pims number or insurance number)**
5. Select **Create Recipient**.

**New Recipient**

\*Required

ODA Only / No Medicaid ID

Newborn

Last Name\*

First Name\*

Date Of Birth\*

Program\*  PPPD

Payer\*  ODA

Medicaid ID

Client Payer ID\*

SSN

Phone

[CANCEL](#) [CREATE RECIPIENT](#)



## Step 2: Verify Information

1. Recipient Profile screen populates.
2. Review Recipient personal identifiers, including addresses and phone numbers.
3. If you are editing/updating profile, ensure you select **Save** at the end.

Recipients / Edit Recipient

[BACK](#) Doe, Jane MyC | Active

Recipient ID: 8 | Medicaid ID: -- | Main Address: 101 Main Street | Main Emergency Contact: -

Personal\* Program Schedules

**Identifiers**

Recipient ID	8	Medicaid ID	-
SSN	-	Agency ID	1111111

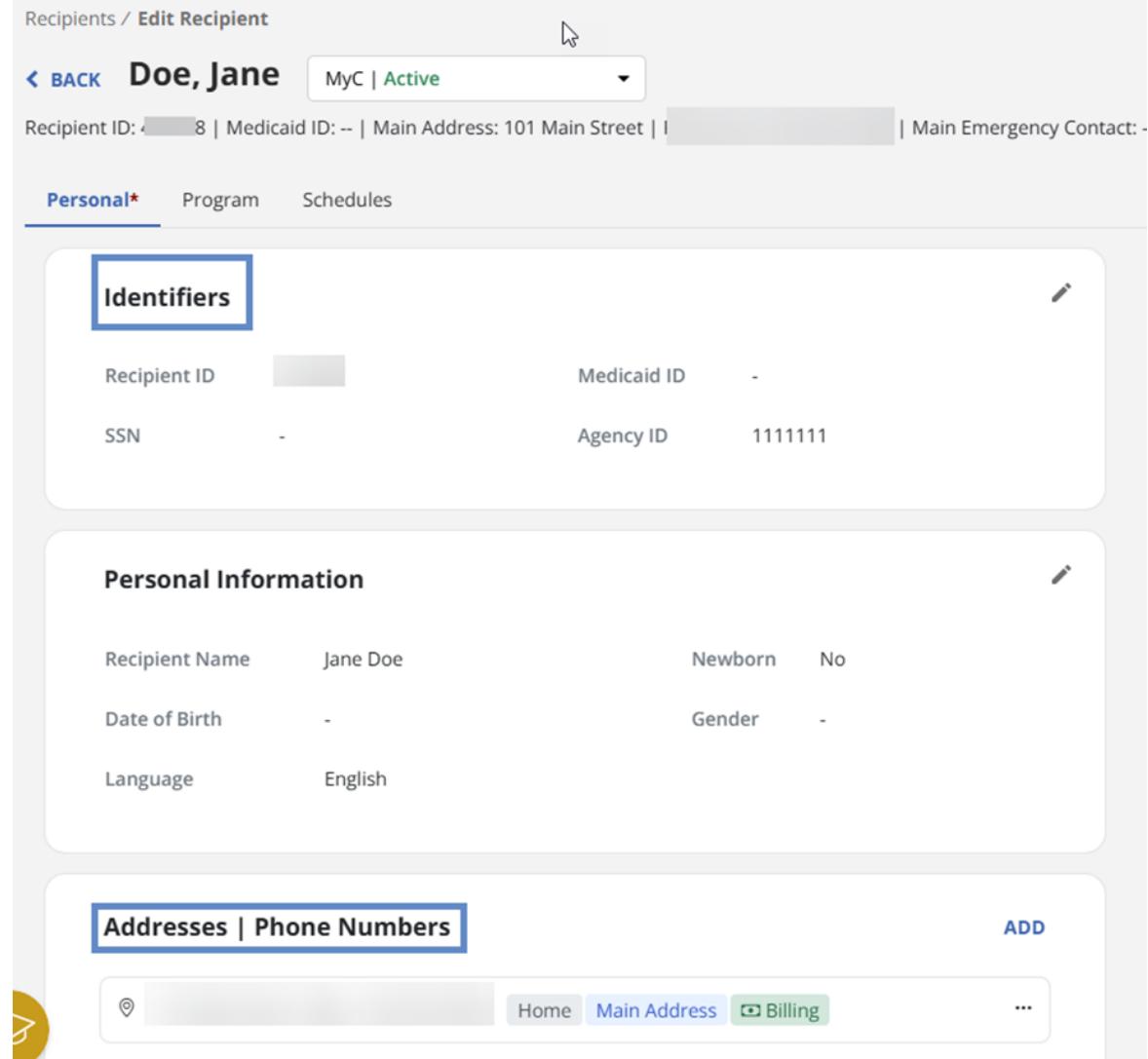
**Personal Information**

Recipient Name	Jane Doe	Newborn	No
Date of Birth	-	Gender	-
Language	English		

**Addresses | Phone Numbers**

Home Main Address Billing

...





## Step 3: Update Services

1. Navigate to **Program** tab.
2. Add Services for recipient; fill out required fields, **including Service, Start and End Date**.
3. Add EVV Authorizations for recipient; fill out required fields, including **Payer, Service, Event Code, Format, and Start and End Date**.
4. If a **Payer** is changing, ensure you add the Payer with a new authorization.

**Note:** End date the existing authorization and use the add authorization button to create a new authorization for the new Payer.

### Creating Recipient Authorizations

[ODM EVV Program and Service Code Guide](#)

**Service Details**

\* Required

**Service**

Service\*

Start Date \*

End Date

**Authorization Details**

\* Required

**General Info**

Payer\*

Authorization Number

Service\*

Modifiers: 1:  2:  3:  4:

Event Code\*

Format\*

Voided

**Date Range**

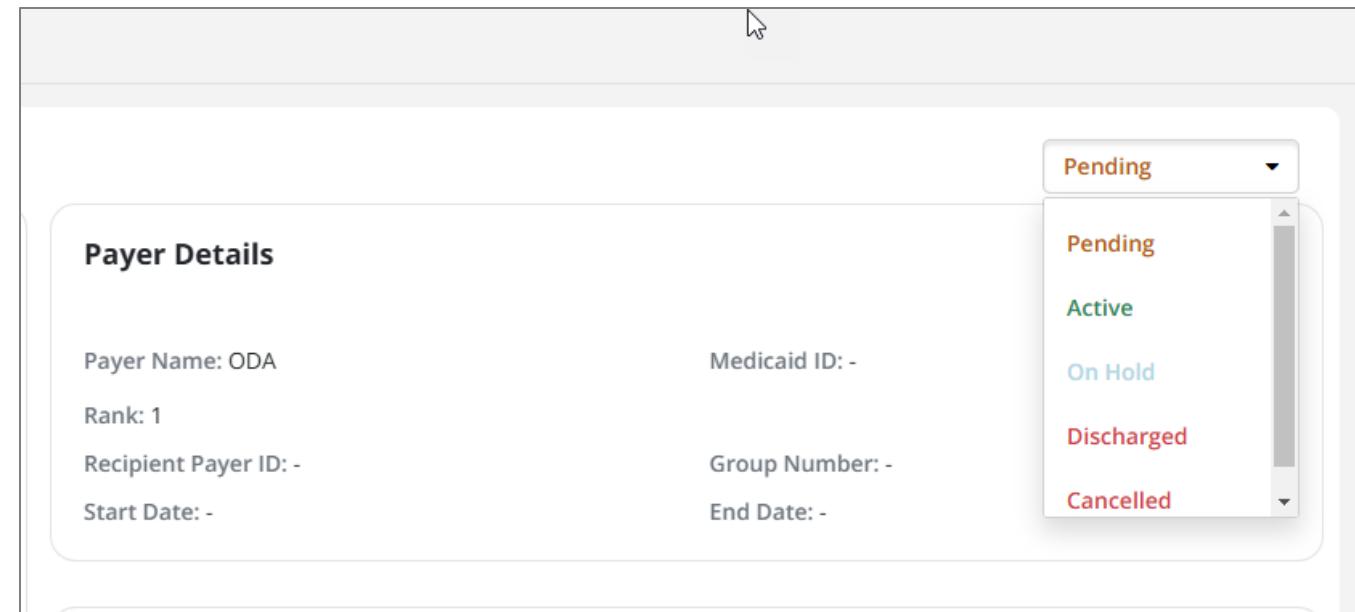
Start Date\*

End Date\*



## Step 4: Update Status

1. Navigate to Program tab.
2. Update Status to Active.





## Visit Counts By Exceptions

## Visit Counts By Status

## Date Range

Today

## Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

## Visit Exception Count Per Day



Need some guidance? Use this <sup>x</sup>  
OH User Training Guide!



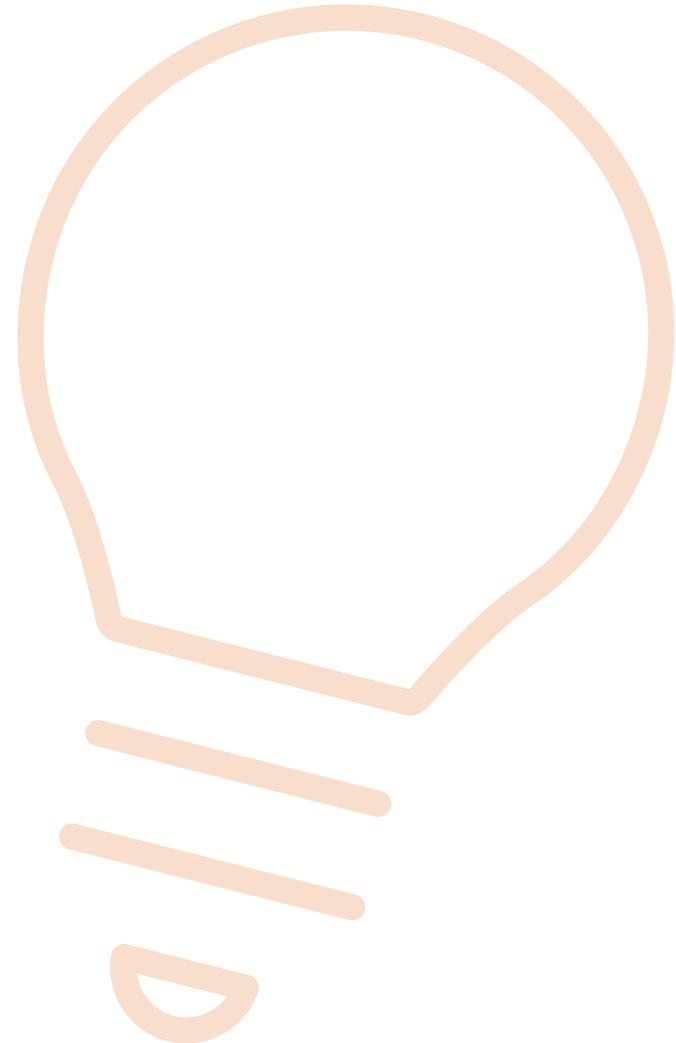


## Knowledge Check-Recipient Profile



Which is NOT required to create a Recipient record ?

- A. Medicaid ID
- B. Date of Birth
- C. Payer
- D. Last Name and First Name



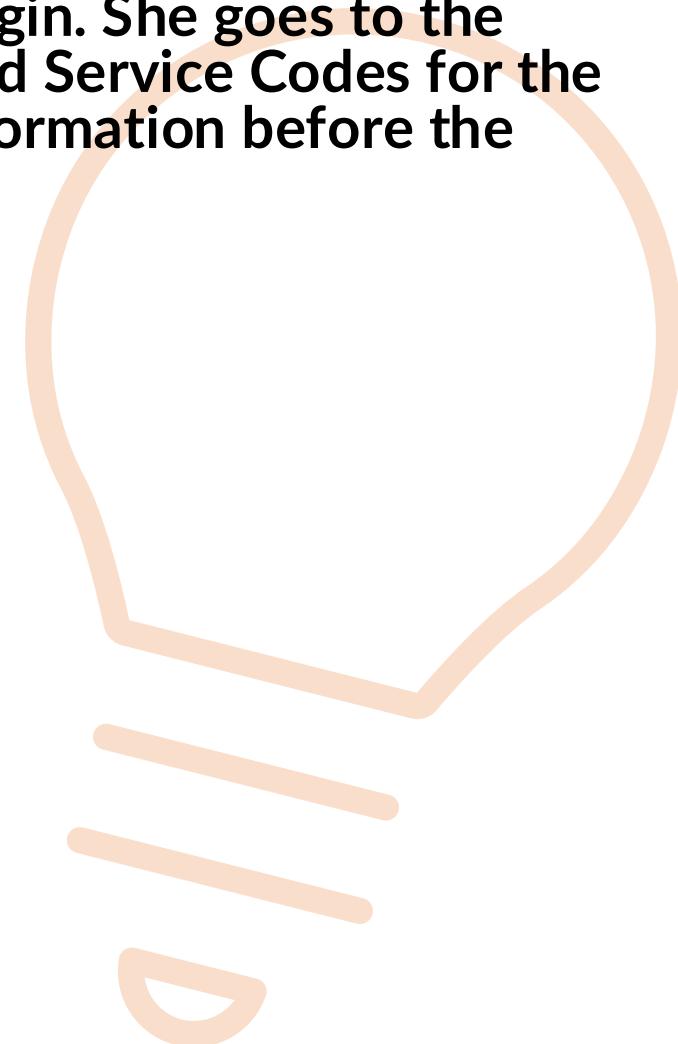


## Knowledge Check-Recipient Authorizations



**Maria is reviewing a recipient's record before services begin. She goes to the Program tab to check the EVV Authorizations, Payers, and Service Codes for the recipient. Why is it important for Maria to review this information before the provider delivers services?**

- A. To update the recipient's contact details
- B. To prevent EVV claim errors
- C. To assign caregivers to the recipient
- D. To review visit notes





# Creating DCW Profiles (Agency Only)



# Independent Providers: Your DCW/Employee records have been created for you!



- This information has been created for Independent Providers; there is no action for you to create a profile.
- Mobile is enabled by default.
- **Note:** If profile edits are needed, providers will need to update information in the PNM (Provider Network Management) System.
  - Please allow for changes to process then review in Sandata EVV.



## Creating DCW/DCW – Agency Providers Only



1. Navigate to DCW/Employee module > Create DCW/Employee.
2. Fill out all required fields.
3. Toggle mobile access next to mobile user if this DCW/Employee will be using the Sandata Mobile Connect (SMC) App.
4. Select Create DCW/Employee.
5. Providers can now edit/add personal information, addresses and personal identifiers.



Q Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

## Visit Counts By Exceptions

## Visit Counts By Status

Date Range

Today

## Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

## Visit Exception Count Per Day



Need some guidance? Use this <sup>x</sup>  
OH User Training Guide!





# Exporting Data

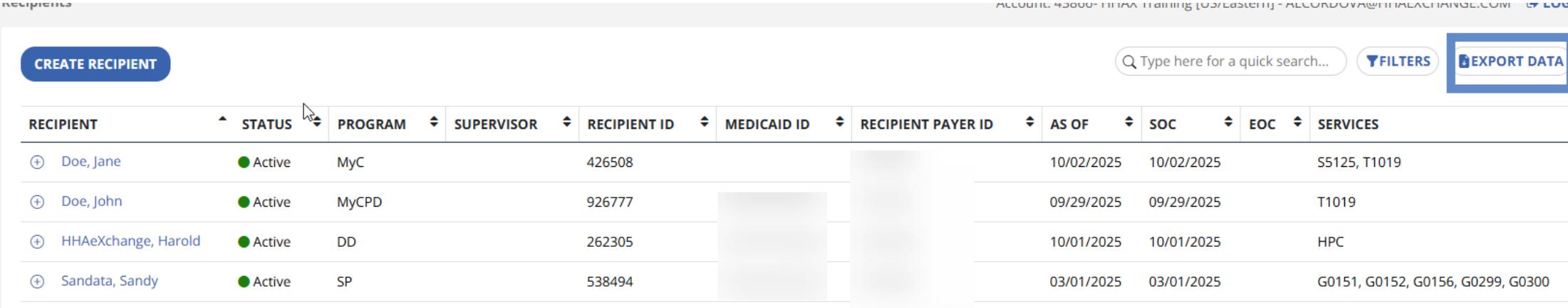


# Exporting Data from List Views



Sandata EVV offers providers the ability to export data. This can be used as a reporting tool when needing to verify your recipients, DCW.

Downloadable options include: CSV, Excel, PDF



The screenshot shows the Sandata Home Care software interface. The left sidebar includes 'Navigation Modules' (Dashboard, Recipients, Recipient Management, DCW/Employees, Scheduling), 'CREATE RECIPIENT' button, and a search bar. The main area displays a list of recipients with columns: RECIPIENT, STATUS, PROGRAM, SUPERVISOR, RECIPIENT ID, MEDICAID ID, RECIPIENT PAYER ID, AS OF, SOC, EOC, and SERVICES. The 'EXPORT DATA' button in the top right is highlighted with a blue box. The data in the table is as follows:

RECIPIENT	STATUS	PROGRAM	SUPERVISOR	RECIPIENT ID	MEDICAID ID	RECIPIENT PAYER ID	AS OF	SOC	EOC	SERVICES
Doe, Jane	Active	MyC		426508			10/02/2025	10/02/2025		S5125, T1019
Doe, John	Active	MyCPD		926777			09/29/2025	09/29/2025		T1019
HHAeXchange, Harold	Active	DD		262305			10/01/2025	10/01/2025		HPC
Sandata, Sandy	Active	SP		538494			03/01/2025	03/01/2025		G0151, G0152, G0156, G0299, G0300

# Demo Video- Exporting Data



Account: 15000 Training - RECORDS@HHAEXCHANGE.COM Select Agency

Sodata  
Home Care

SEARCH

Visit Counts By Exceptions

Visit Counts By Status

Date Range

Today

Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day



Need some guidance? Use this <sup>x</sup>  
OH User Training Guide!



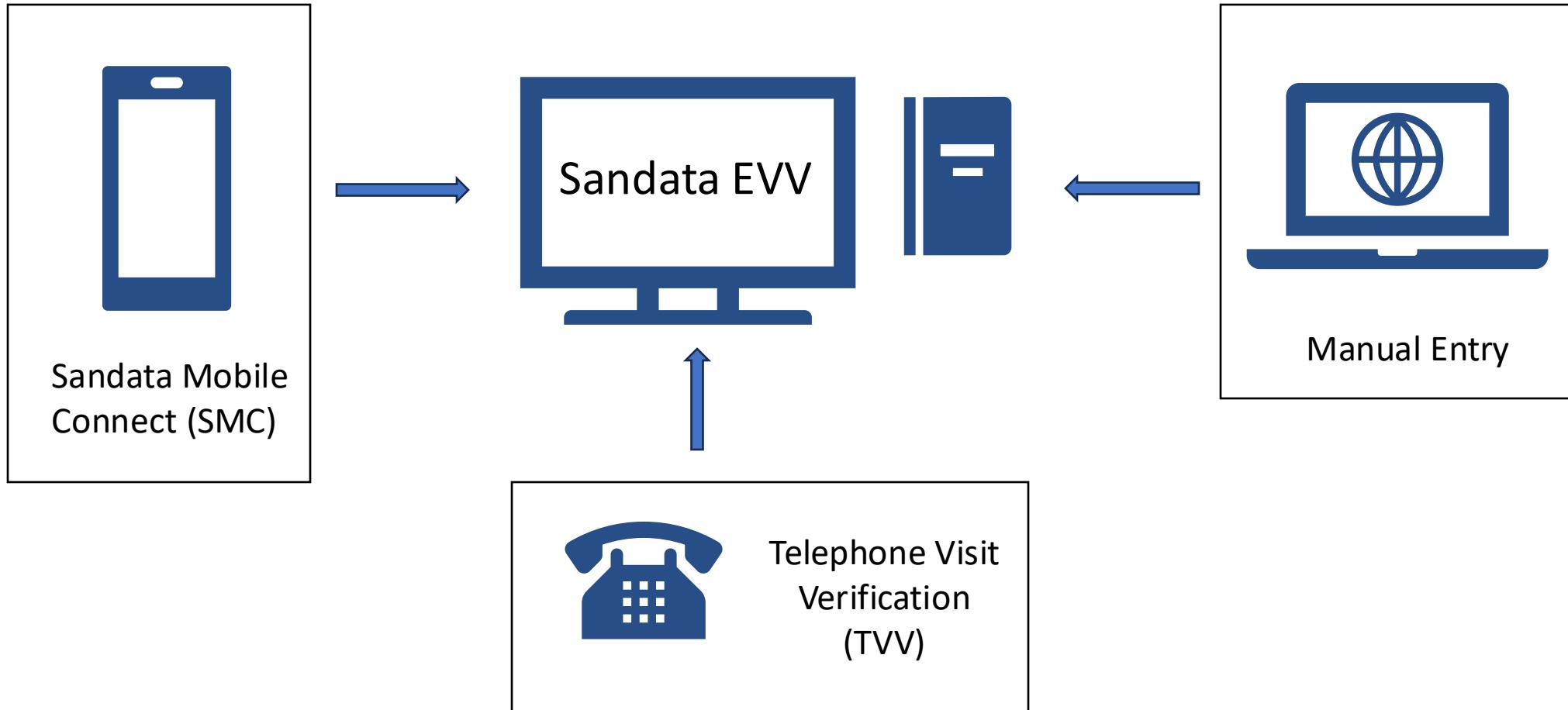
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# EVV Checkpoints

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## Visit Capture Methods





# EVV Agency Checkpoints

Enable Your Employees to Perform EVV



Depending on your EVV Clock In/Out method, make sure you locate and enable the following:



Enable  
Mobile User



Locate the  
DCW/Employee  
Passcode  
(Santrax ID)



Locate  
the Sandata  
EVV 800 #



Locate the  
Recipient ID  
or Medicaid  
ID



Run Active  
DCW/Employees  
and  
Active Recipients  
Report



# EVV Independent Provider Checkpoints

Enable Your Employees to Perform EVV



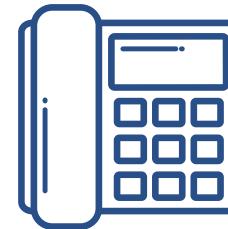
Depending on your EVV Clock In/Out method, make sure you locate and enable the following:



Enable  
Mobile User



Locate the  
DCW/Employee  
Passcode  
(Santrax ID) and  
TVV Pin



Locate  
the TVV #



Locate the  
Recipient ID  
or Medicaid  
ID



# **Sandata Mobile Connect (SMC)**



# Enabling Mobile User

SMC logins are created when the DCW/Employee is in the Sandata EVV system and enabled as a **mobile app user**.

**Note:** Ensure that an email address is listed for employee to receive temporary mobile password!

Edit Address and Phone Number X

\* Required

Address Label

Address Line 1

Address Line 2

Address Type

Zipcode

City

County

State

Mobile Phone Number\*

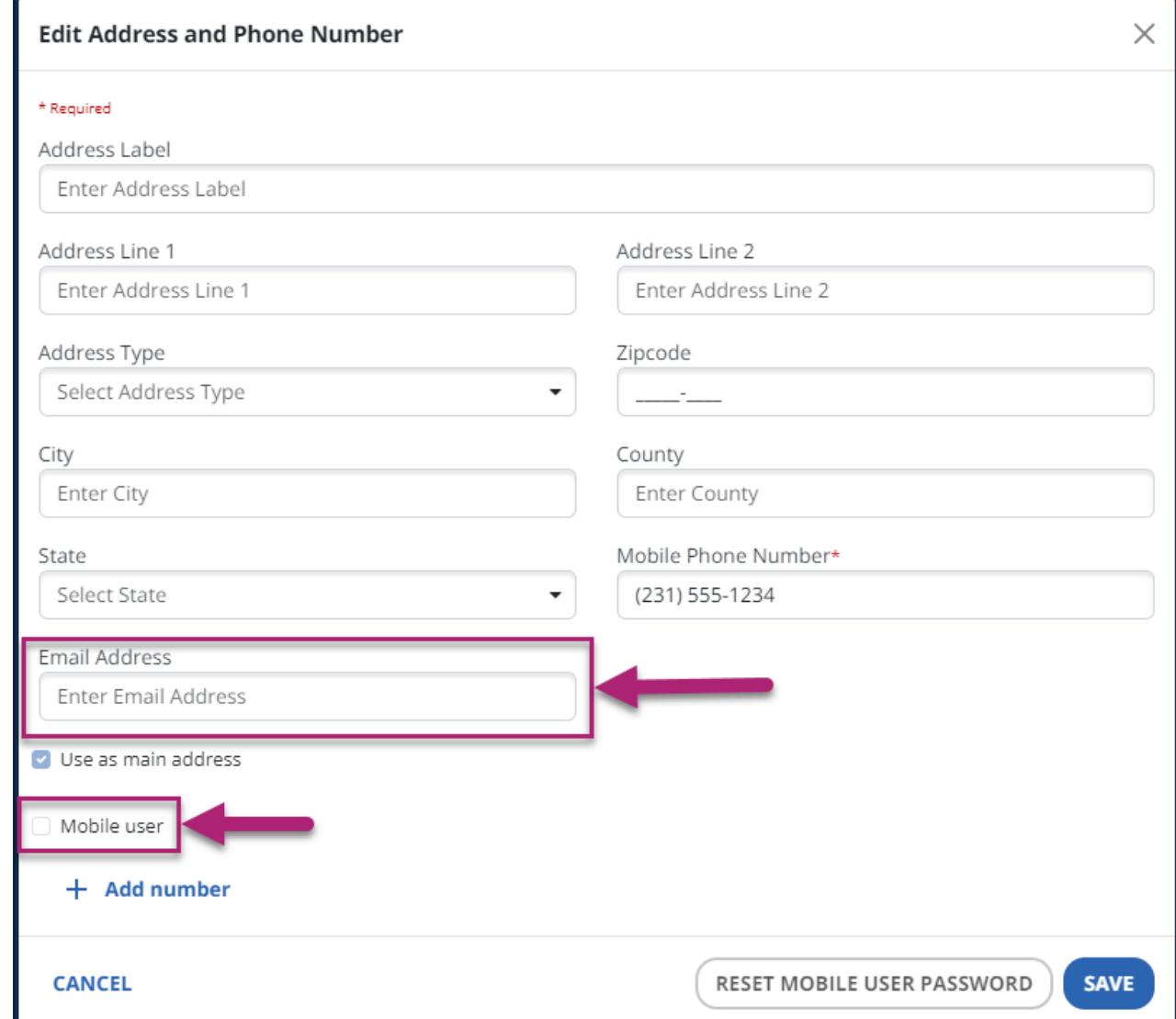
Email Address

Use as main address

Mobile user

[+ Add number](#)

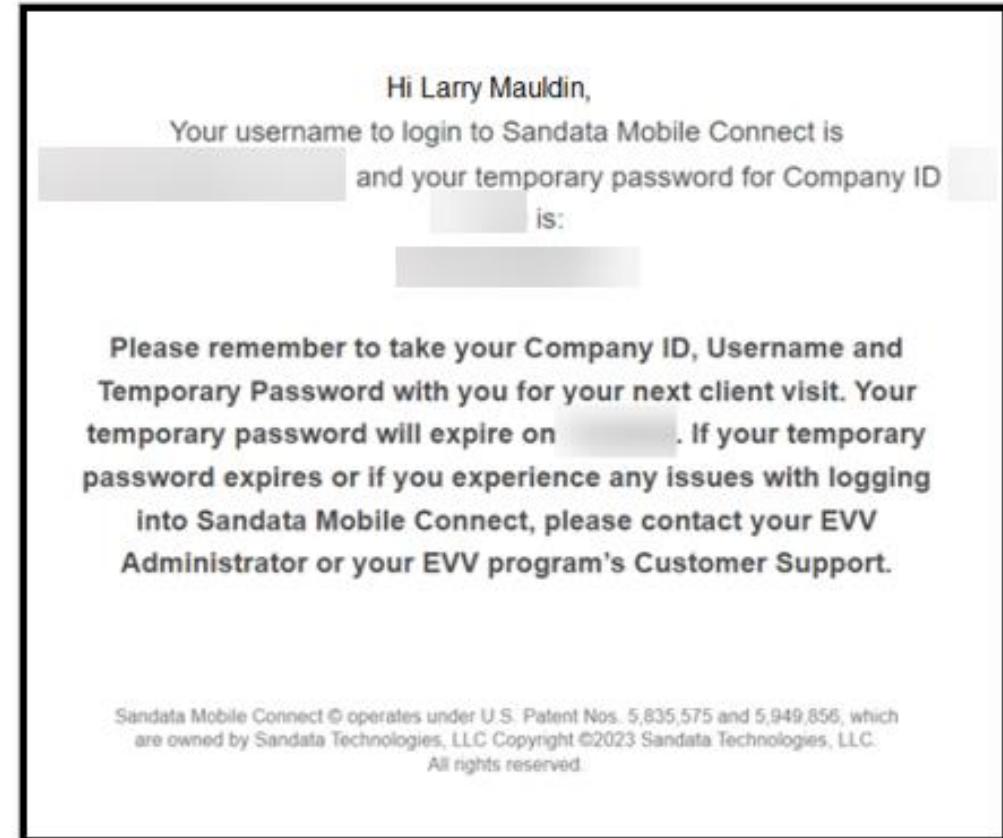
[CANCEL](#) [RESET MOBILE USER PASSWORD](#) SAVE





## Email Confirmation to DCW/Employee

- Once set up, the DCW/Employee will receive an email that includes:
  - Username
  - Temporary password
  - Company ID

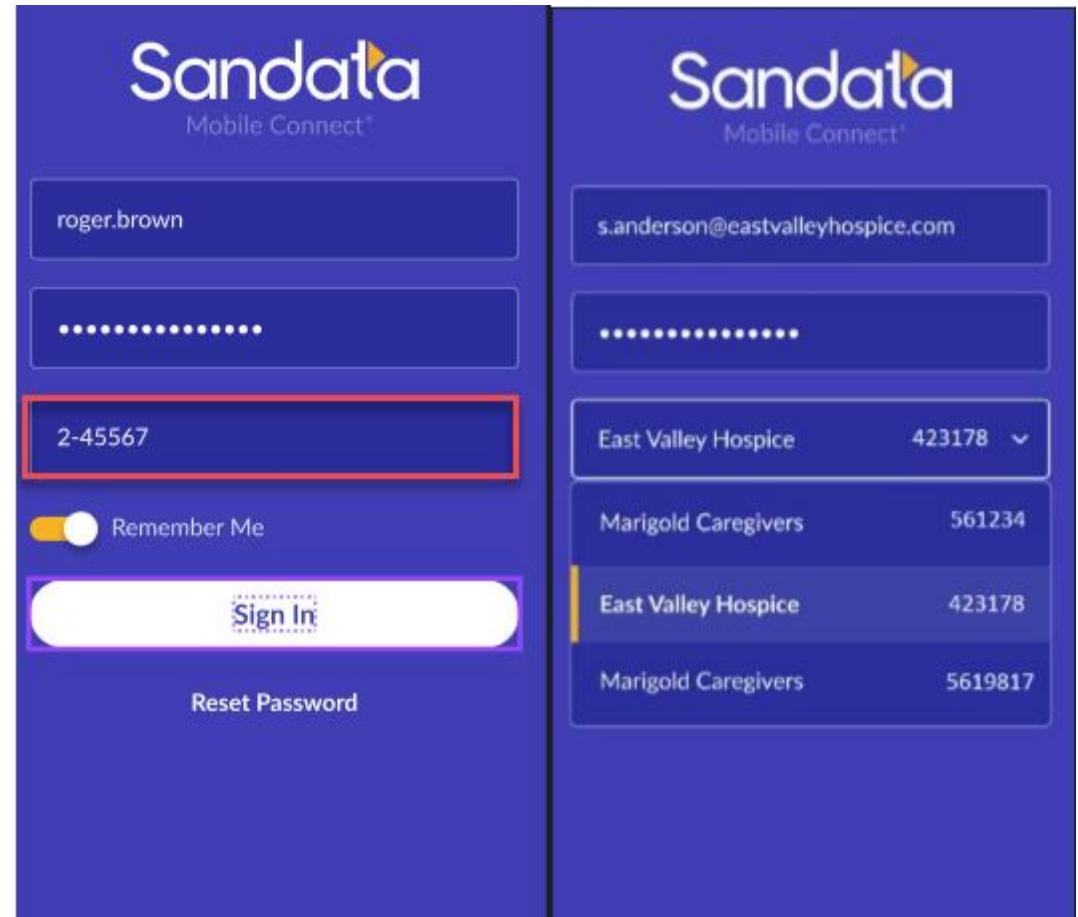




## First Time Log In



Once the DCW/Employee downloads and opens app, they will enter in the information provided in the email to start their visits.

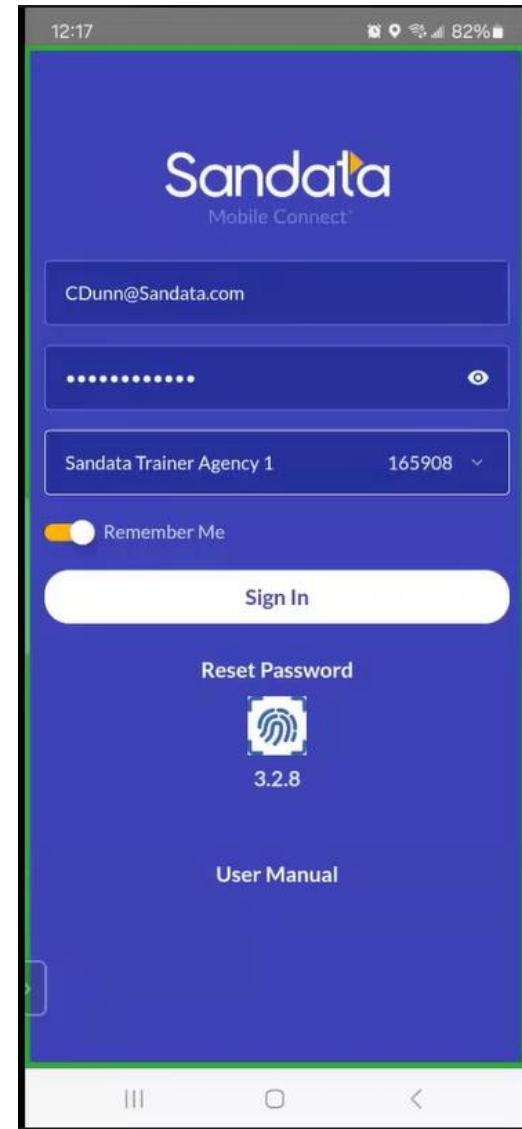




# First Time Log In Demo



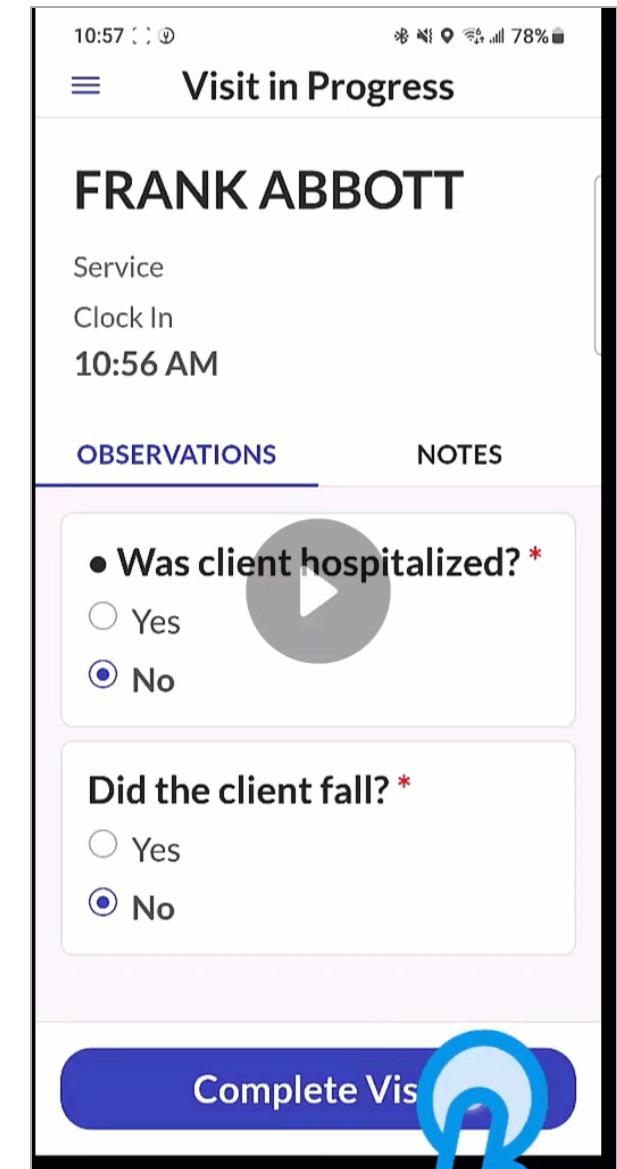
1. From Email, fill in:
  - **Username** (email)
  - **Temporary password**
  - **Company ID**
2. Tap **Sign In**.
3. Create a password using the requirements; tap **Continue**.





## Sandata Mobile Connect (SMC)

- SMC can be used from a cell phone or Wi-Fi-enabled device to clock in and out of visits.
- Can work in an 'offline' mode. Visit data will appear once DCW/Employee's device has reconnected to cellular service or Wi-Fi.





# Telephony Visit Verification (TVV)



## TVV Overview



- Available as an alternate to the mobile Sandata Mobile Connect App (SMC) call in/call out process.
- When using TVV, the DCW/Employee can call in/call out from any authorized phone number listed in the Recipient record.



# Locating DCW/Employee Passcode



If a DCW will be utilizing TVV for EVV capture, make sure to provide the employee with Santrax ID to successfully call in and call out.

**Navigate to DCW/Employee Record > Personal Tab**

**Note (Independent Providers):**

Passcode is equivalent to the TVV Pin.

DCW/Employees / Edit DCW/Employee

[◀ BACK](#) [Personal, Preferences](#)

DCW/Employee ID: 990000000 | Phone No: (██████████) | Email Address: ██████████ | Main Emergency Contact: --

[Personal](#) [Schedules](#)

Identifiers	
SSN	-
Passcode	████████
Status	Active
Effective Date	Jun 27, 2024
DCW/Employee ID	990000000
Position	CGV- Caregiver
Hire Date	-
Supervisor	-
National Provider ID	Santrax ID 839205



## Locating Recipient ID/Phone Line

Providers can locate the Recipient ID and phone number in the Recipient profile to provide to DCW/Employee's for calling in and calling out.

**Identifiers**

Recipient ID	748558	Medicaid ID	299
SSN	-	Agency ID	299

**Addresses | Phone Numbers**

400 ANYWHERE	(501) 444-4444	Main Address
--------------	----------------	--------------

# Demo Video- EVV Checkpoints



Sodata Home Care

Microsoft Search (Alt+Q)  
Just start typing here to bring features to your fingertips and get help.

Visit Counts By Exceptions Visit Counts By Status

Date Range Today

Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day

Exception Count

11/11

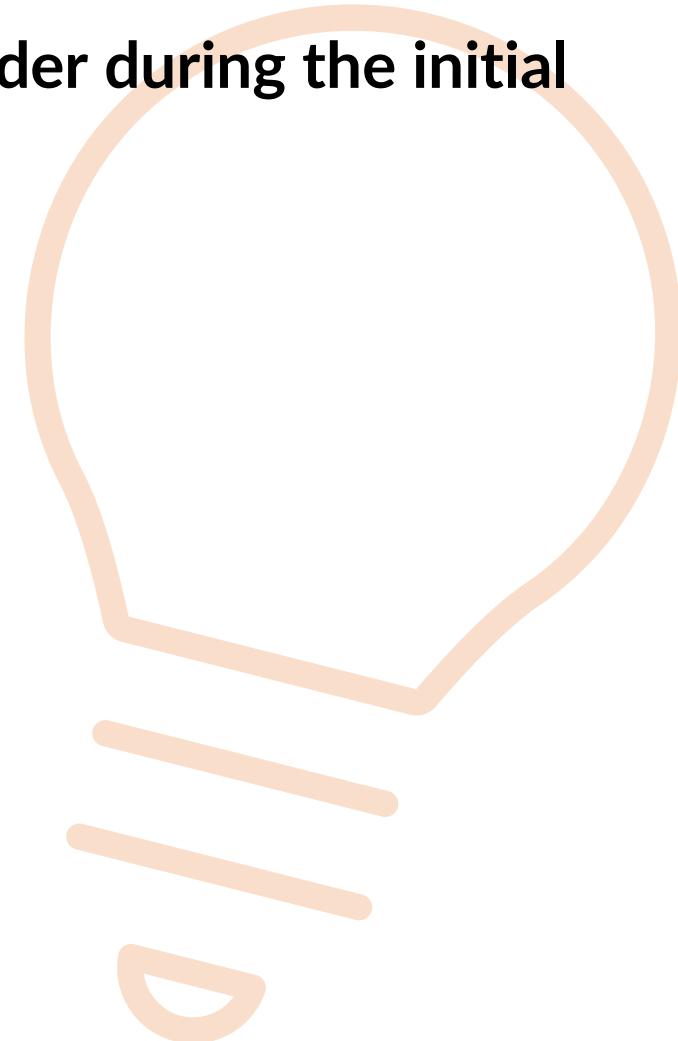
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## Knowledge Check- SMC User



**What is NOT needed for the DCW/Independent Provider during the initial log in to Sandata Mobile Connect App (SMC)?**

- A. Temporary Password
- B. Recipient ID
- C. Company ID
- D. Username





# Visit Capture using SMC or TVV



# Starting a Visit via SMC App

## Option 1: Searching for Recipient ID



- Displays a list of the recipient's authorized services to choose from.
- Less room for visit errors.

## Option 2: Start Unknown Visit



- More room for error.
- No specific services in scope.
- Will cause a visit exception.



## Starting a Visit with Recipient ID



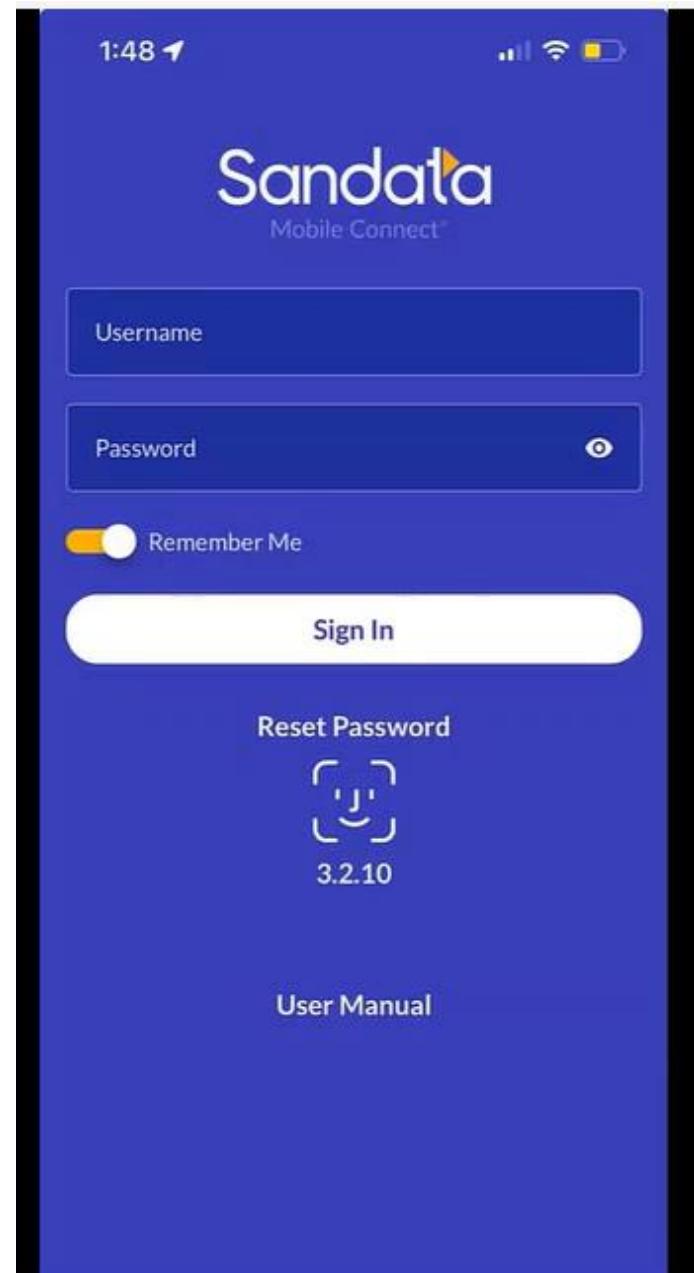
Your DCW arrives at the home of a recipient authorized to receive services. This DCW opted to start her visit by searching for the Recipient ID in the SMC app. This method is preferable as it ensures that all the right details (Recipient ID, Service) are linked to the visit, reducing the chances of visit exceptions and helping the visit to match a claim.



## Starting a Visit with Recipient ID Steps

1. Log in to SMC app.
2. Tap the hamburger icon (≡) > Recipients.
3. Enter Recipient ID in the Search bar; tap Search.
4. Tap Start Visit.
5. Select Service; tap Continue.
6. Select Location; tap Continue.
7. Tap Yes to start visit.

[OH-SMC Video Resource](#)





## Start an Unknown Visit

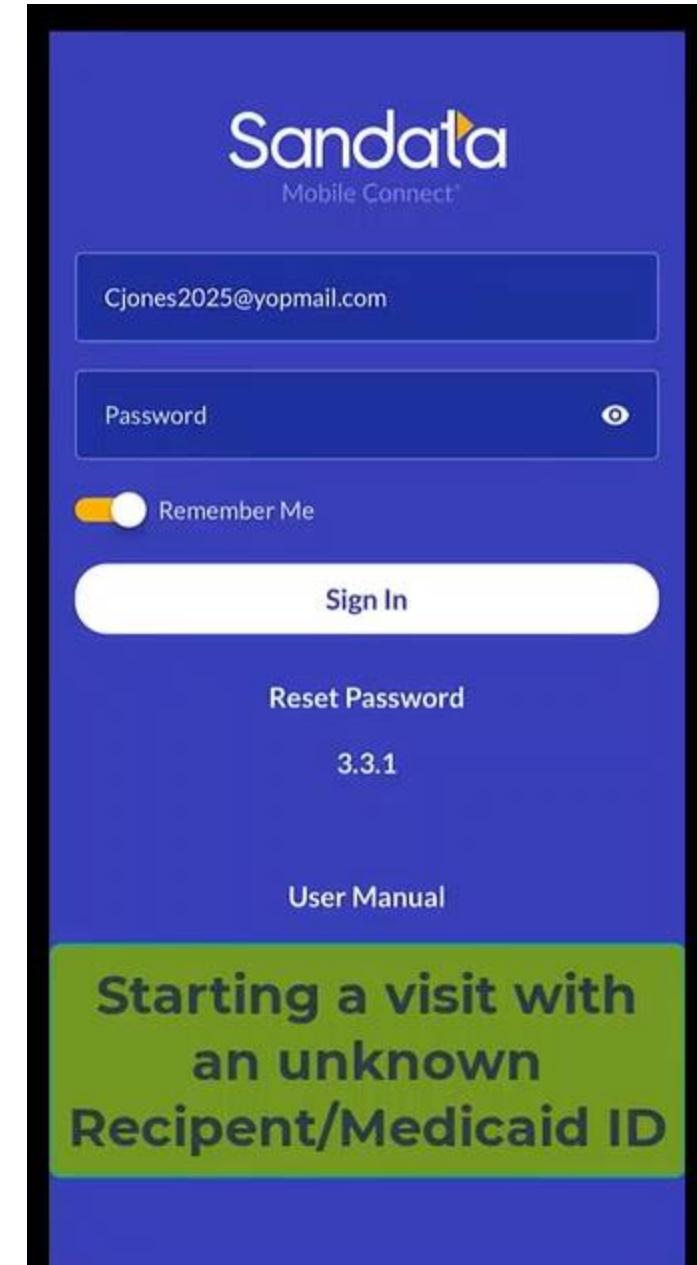
An DCW was called in to cover a visit for another DCW who called out unexpectedly. When they arrived at the recipient's home, they logged in to the SMC app and enter the Recipient ID provided to them by the office; however, it's not working, or the recipient doesn't appear in the search. Since they are unable to start the visit through the standard method, and services still need to be delivered on time, the DCW decided to use the **Start Unknown Visit** option in the app to clock in and begin care.

A visit exception will be created and will need to be resolved later by the agency administrator.



## Start an Unknown Visit

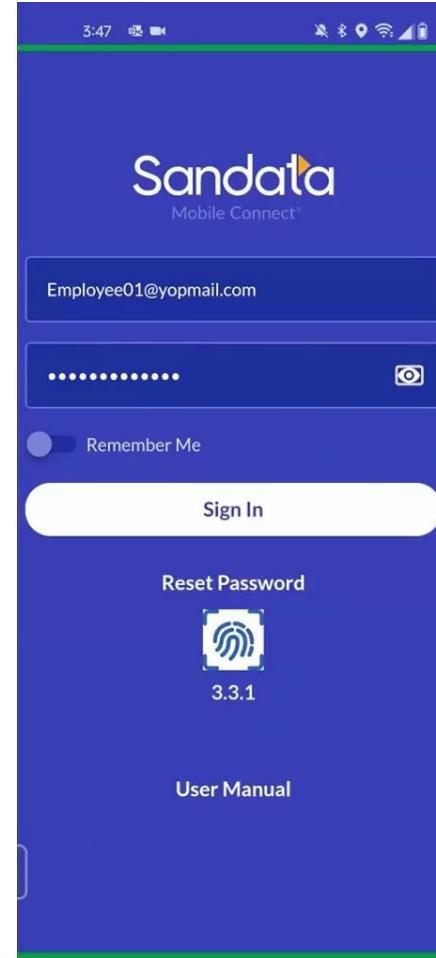
1. Log in to SMC app.
2. Tap the **hamburger icon (≡ )** > **Recipients**.
3. Tap **Start Unknown Visit**.
4. Enter **First** and **Last** name of recipient.
5. Tap **Start Visit**.
6. Select from the list of **Services**.
  - **Note:** this displays all services codes identified by the state that are in scope.
7. Tap **Continue**.
8. Select **Location**; tap **Continue**.
9. Tap **Yes** to start visit.





# Ending a Visit

1. **Log in to SMC app.**
2. **Tap on the Visit In Progress.**
3. **Tap Complete Visit.**
  - **Note:** Please defer to your Provider on where to document visit notes (not in app).
4. **Select Location; tap Continue.**
5. **Tap Confirm to end visit.**





## Why Would You Need to Abandon a Visit?



Kayla, a DCW, arrives at Mr. Ramirez's home to provide a scheduled morning visit. She opens the SMC app and successfully starts the visit. After completing personal care services, Kayla quickly packs up and heads to her next scheduled recipient, thinking she's on time.

At her next stop, Ms. Chen's house, she attempts to start the visit in the SMC app but receives a message that states that she's unable to start a visit because a previous visit is still opened. She quickly realizes that she forgot to end Mr. Ramirez's visit before leaving.

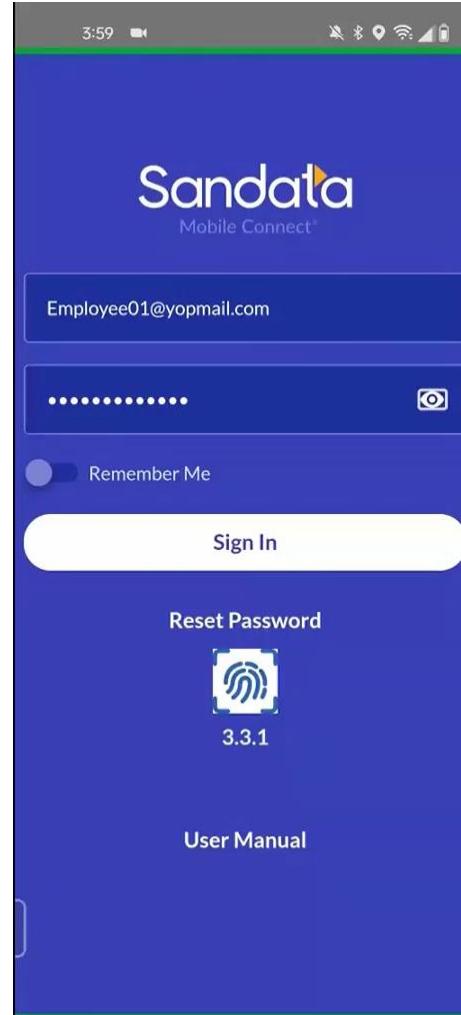
**Note:** If a DCW forgets to clock out and 24 hours has elapsed the system will automatically abandon the visit.



# Abandoning a Visit



1. Log in to SMC app.
2. Tap on the **Visit In Progress**.
3. Tap the **Trash Can** icon.
  - **Note:** This does not delete the visit record.
4. Tap **Yes** to abandon visit.





## Overnight Visits



Sandata will automatically split overnight visits to appropriately identify the number of units per calendar day as required by DODD OAC billing.

Example:

Recipient receives 13 units daily.

Shift: 8:45 pm – 12:30 am

- 13 units day 1 (8:45pm-11:59pm)
- 2 units day 2 (12am-12:30 am)

GENERAL	PAYER	PROGRAM	SERVICE
RECIPIENT	DODD	DD	Residential Respite (RR)
<hr/>			
DCW/EMPLOYEE	VISIT 1 - 07/27/2025		
CALL LOG	FROM TIME	TO TIME	BILL HOURS
SPLIT DETAILS	08:47 PM	12:00 AM	03:13
EXCEPTIONS	<hr/>		
GPS	VISIT 2 - 07/28/2025		
	FROM TIME	TO TIME	BILL HOURS
	12:00 AM	12:30 AM	00:30
	<hr/>		

[Unit Conversion Table](#)



# Telephonic Visit Verification (TVV) Information



# Service List



**Sandata**

**Ohio Service List**

Write your Santrax ID above for easy reference. This ID is required to be entered when creating a telephony visit.

English toll-free number. Please refer to your Call Reference Guide for additional languages.

Service ID	Description	Service ID	Description
<b>PASSPORT Waiver</b>		<b>Level One, Individual Options, and Self Waiver</b>	
515	PASSPORT Waiver Nursing RN (T1002)	535	IO Waiver Nursing RN (T1002)
616	PASSPORT Waiver Nursing LPN (T1003)	636	IO Waiver Nursing LPN (T1003)
717	PASSPORT Waiver Home Care Attendant Nursing (S5125)	838	Homemaker or Personal Care (HPC)
727	PASSPORT Waiver Choices HCAS (T2025)	842	Participant-Directed Homemaker or Personal Care (HPCPD)
747	PASSPORT Waiver Consumer Directed Personal Care (T1019)	927	Nursing Delegation RN (G0493)
777	PASSPORT Waiver Home Care Attendant Personal Care (S5125)	928	Nursing Delegation RN Per Visit (G0493_U9)
818	PASSPORT Waiver Personal Care (T1019)	929	Nursing Delegation LPN (G0494)
931	PASSPORT Waiver Enhanced Community Living (ECL)	930	Residential Respite (RR)
<b>Ohio Home Care Waiver</b>		<b>State Plan</b>	

**Pro-Tip:** Keep this printed sheet in an easily accessible location at the recipient's home.

Ensure that the Santrax ID and toll-free number is printed at the top for easy reference.

Write down the Recipient ID in the folder.

Highlight applicable service codes for the recipient.

Scan the QR code for this OH service list.





## Prepare for the Call



Ensure this information is available before calling:

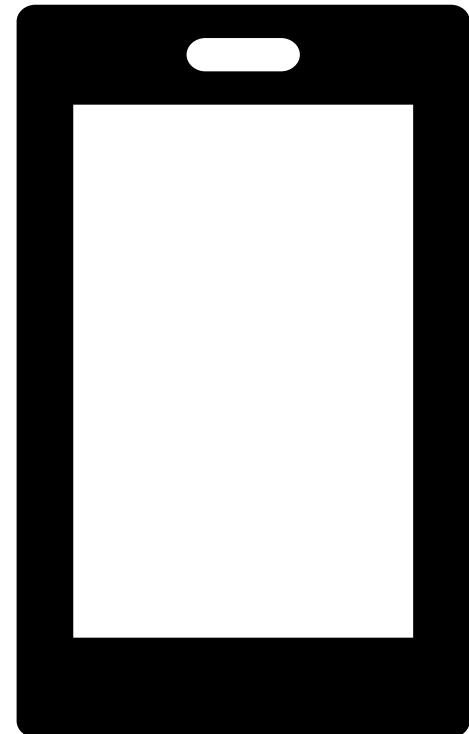
- Santrax ID
- TVV Pin or also known as Passcode for (Independent Providers)
- Recipient ID
- Toll-free number for your agency



## Calling In to Start a Visit



1. Dial the assigned toll-free number from client's landline.
2. Select your language.
3. Enter your Santrax ID.
4. Indicate if this is a group visit (Press 1 for Yes; 2 for No).
5. Select Location (Press 1 for Home, 2 for Community).
6. Press 1 to Call In.
7. Enter Client ID.
8. Hang up.

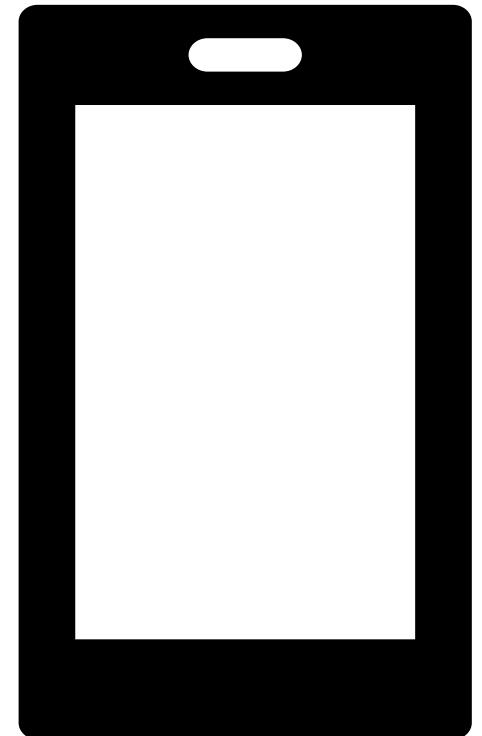




## Calling In to End a Visit



1. Dial the assigned toll-free number from client's landline.
2. Select your language.
3. Enter your Santrax ID.
4. Indicate if this is a group visit (Press 1 for Yes; 2 for No).
5. Select Location (Press 1 for Home, 2 for Community).
6. Press 2 to Call Out.
7. Enter Client ID.
8. Enter and Accept Service ID.
9. Hang up.





# Preparing your DCW/Employees

# ➤ Preparing DCW

## You should determine...

- How do your DCW/Employee's use technology today?
- What appeals to your DCW/Employee?
- Where they are in the DCW/Employee lifecycle?

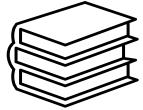
## Training DCW/Employees

1. Require your DCW to download the SMC mobile app during training.
2. Take advantage of EVV training tools and provide documentation.
3. Document the recipient ID and leave it in a folder near the phone in the recipient's home.
4. Set expectations and check in.





# DCW/Independent Training Resource



- [Sandata Mobile Connect Documentation](#)
- Documentation on:
  - Downloading and Logging in to mobile app.
  - Starting a visit using the mobile app.
  - [Ohio Service List](#)



Sandata  
Get more right from the start

Sandata News New User Sign Up Submit a request Sign in

Search

Sandata On-Demand / Sandata Learn Product Help **Payer Programs** Caregiver and CDS Client Library EVV Vendor Solutions Provider

Sandata Technologies / Payer Programs / Ohio (OH ODM) / Ohio User Guides / Visit Capture / Sandata Mobile Connect (SMC) English

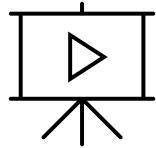
## Sandata Mobile Connect (SMC) English

Follow

- Sandata Mobile Connect Login
- Starting a Scheduled Sandata Mobile Connect Visit
- Completing a Sandata Mobile Connect Visit
- Starting an Unscheduled Sandata Mobile Connect Visit
- Starting an Unknown Sandata Mobile Connect Visit



# DCW/Independent Provider Video Library



- [Ohio Direct Care Worker Video Library](#)
- Videos on:
  - Starting and completing a visit
  - Resetting and changing a password
  - TVV call in and out



The screenshot shows the Sandata website interface. At the top, there is a navigation bar with links for 'Sadata News', 'New User Sign Up', 'Submit a request', and 'Sign in'. Below the navigation bar, there is a search bar with a magnifying glass icon and a 'Search' button. The main content area features the 'Sadata' logo and the tagline 'Get more right from the start'. A 'Search' bar is present. Below the search bar, there are several navigation links: 'Sandata On-Demand / Sandata Learn', 'Product Help', 'Payer Programs' (which is highlighted in blue), 'Caregiver and CDS Client Library', 'EVV Vendor Solutions', and 'Provider'. A 'Follow' button is also visible. The main content area is titled 'Ohio Direct Care Worker Video Library' and includes a sub-section titled 'Ohio (OH ODM) / Ohio Instructional Videos'. A descriptive text states: 'In this video library, you will learn how to use the Sandata Mobile Connect App to start and complete your EVV visits.' Below this text is a video thumbnail with the title 'OH Ohio Direct Care Worker Video Channel' and a 'Play' button.



# Key Takeaways



# Key Takeaways – Data Entry



- Ensure the recipient(s) profile status is set to Active prior to capturing EVV visits.
- Edit and/or add services, authorizations to reduce visit exceptions and EVV claim errors.
- Independent Providers who need to update DCW profiles need to update in PNM system first.
- Ensure that your DCW are enabled to use SMC.
- Provide resources to your DCW for training to reduce visit exceptions.
- Alt EVV Providers – work with your Alt EVV vendor to create Recipient and DCW records to capture visits.



# Resources



## Provider Resources



### Ohio User Guides:

- [Ohio User Guides](#)
- [Recipient User Guide](#)
- [DCW/Employee User Guide](#)
- [Ohio Claims Validation: Handling Claims Denials- Sandata Technologies](#)

### Claims Matching:

- [Get Ready for Claims Matching Recording](#)

## Need Assistance?

- Contact the EVV Provider Hotline at 855-805-3505 [Submit a Zendesk Ticket](#)
  - Ensure that you have your STX (account #) when calling hotline or submitting ticket!
- Attend Daily Office Hours – [Register for ODM EVV Office Hours!](#)

## Alt EVV Providers – need help?

For additional support, please contact the Technical Support Alternate EVV team at either options below:

- Phone: 1-844-289-4246
- Email: [OHALtEVV@Sandata.com](mailto:OHALtEVV@Sandata.com)
- Include the following in the email:
  - ✓ Provider Medicaid ID
  - ✓ Alt EVV Vendor
  - ✓ Include Examples (Universal Unique Identifier, copy of payloads) - **ensure this is sent securely via Zendesk portal if there is PHI data.**

## Ohio Department of Medicaid

- [Electronic Visit Verification](#)
- [Ohio Department of Medicaid](#)
- PASSPORT page – updates coming soon



# Questions?



Register for our Upcoming Trainings

THANKS FOR  
ATTENDING!



*Please provide us your feedback  
after exiting the webinar.*