

Our Webinar Will Begin Shortly

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My speaking language: English ›

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Q&A

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Record

More

Meet the Trainer!



Alejandra Cordova



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

Visit Maintenance

February 2026

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Visit Review and Maintenance



This training will assist providers with an overview of the Visit Maintenance module and how to resolve the top visit exceptions in Sandata EVV.

Who should take this training?

Anyone who will be managing visit data in the Sandata EVV Portal.

Alt EVV providers will perform Visit Maintenance in their Alt EVV system. This information is sent to Sandata EVV. Please log in to the Sandata Aggregator to confirm that visits are in a verified status prior to submitting claims. For additional support on resolving visit maintenance exceptions, please contact your Alt EVV vendor.

Objectives of Today's Training

You will be able to:

- Locate visit data.
- Identify and resolve visit exceptions.
- Manually create visits.



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 (DSP)
- Service Provider
- Participant-directed provider

- Attendant
- Caregiver
- Non-Agency or Independent Provider (IP)
- Direct Care Worker (DCW)

AGENCY / PROVIDER

- Financial Management Service Agency (FMSA)
- Vendor

- Program Provider
- Non-Agency or Independent Provider (IP)
- Participant-directed Providers

- AGE-certified provider
- Agency provider

COORDINATOR

- Care Coordinator
- Case Coordinator

- Service Coordinator
- Care Types

- Case manager

UNITY NUMBER

- Enterprise Master Patient Index (EMPI)
- Master Patient Number

- Shared Patient Number

SECONDARY IDENTIFIER

- Master Patient Index (MPI)
- Promise Code

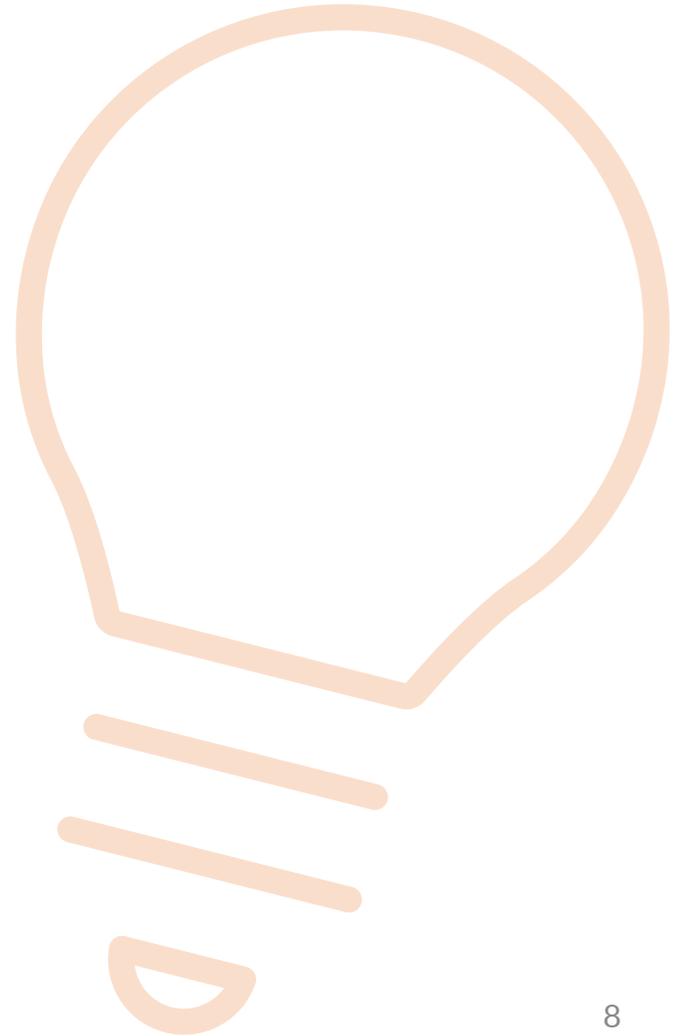
Knowledge Checks

You'll see these throughout the presentation!



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

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





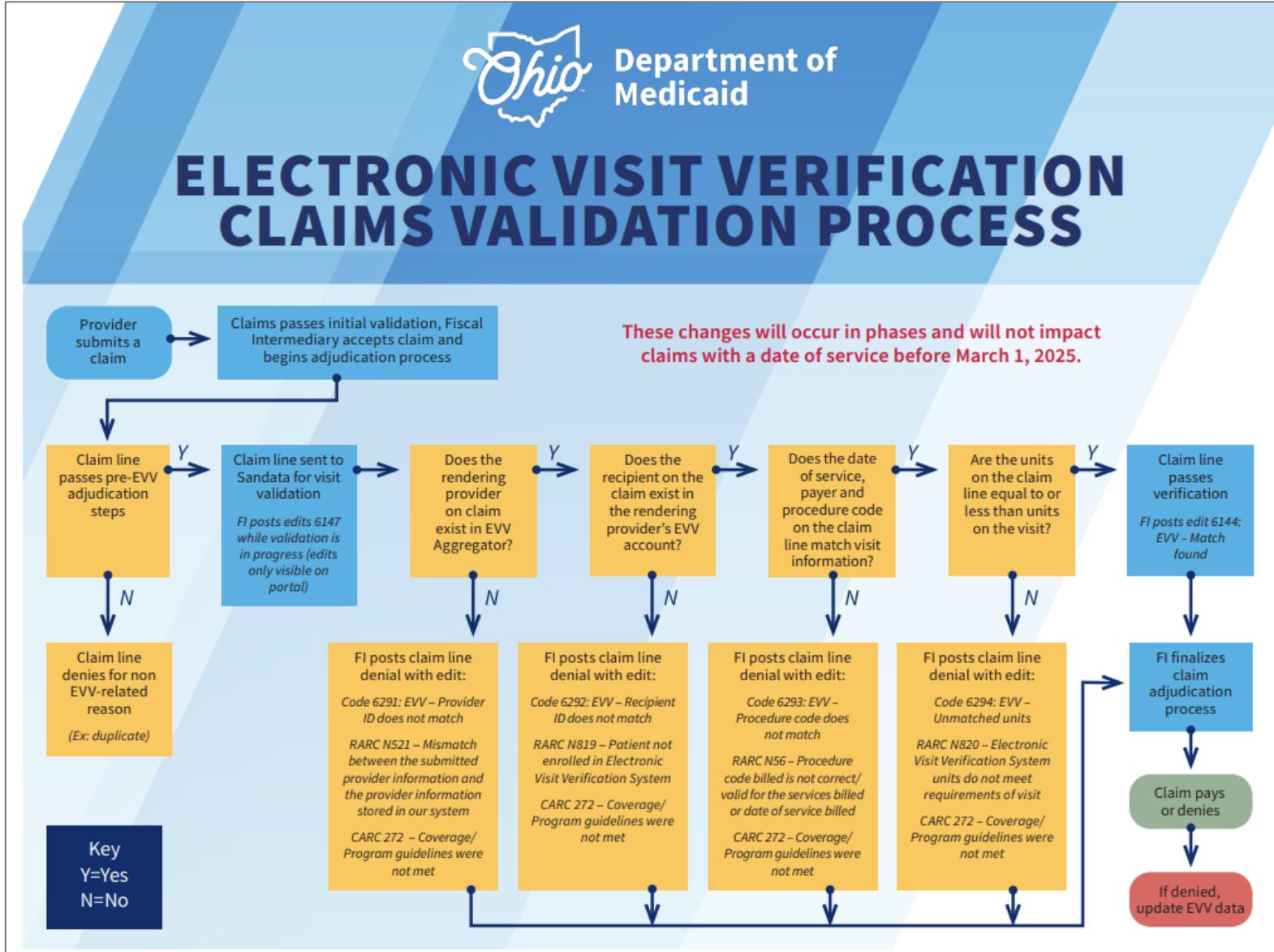
EVV Claims Adjudication Phases



 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	Billed to MyCare
HOME HEALTH SERVICES	PRIVATE DUTY NURSING, NURSE ASSESSMENT AND CONSULT	HOME HEALTH SERVICES	PRIVATE DUTY NURSING NURSE ASSESSMENT AND CONSULT	10, 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

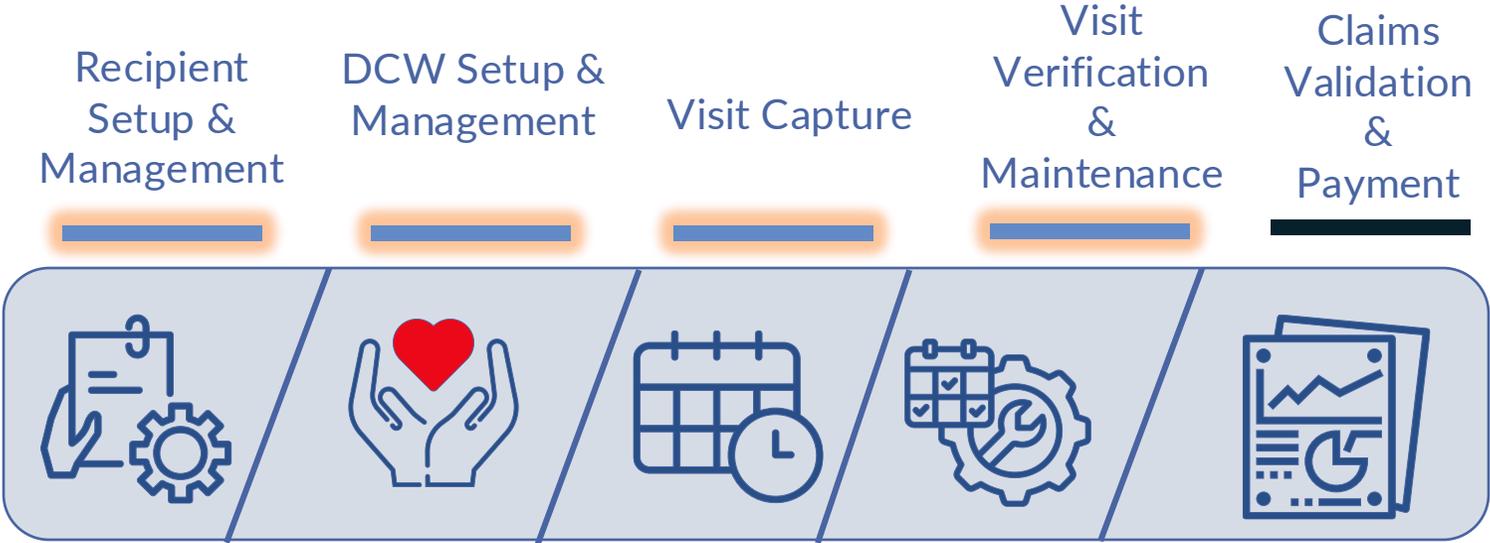


- G0151
- G0152
- G0153
- G0156
- G0299
- G0300
- T1000
- T1001
- T1001_U9
- S5125
- T1002
- T1003
- T1019
- T2025
- ECL

Link to list of Services: [ODM EVV Covered Programs and Services.pdf](#)



EWV Tracker





Agenda

- Visit Maintenance Overview
- How to Create a Manual Visit
- How to Resolve Missing Medicaid ID
- Key Takeaways
- How to Resolve Unknown Client Exception
- Support Resources
- How to Resolve Missing Call In/Out Exception
- Questions
- How to Resolve Unauthorized Service Exception

Visit Maintenance Overview

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What Happens During the Claims Validation Process?



Step 1: DCW or Independent Provider captures the visit, or the provider manually creates the visit in Sandata EVV system.



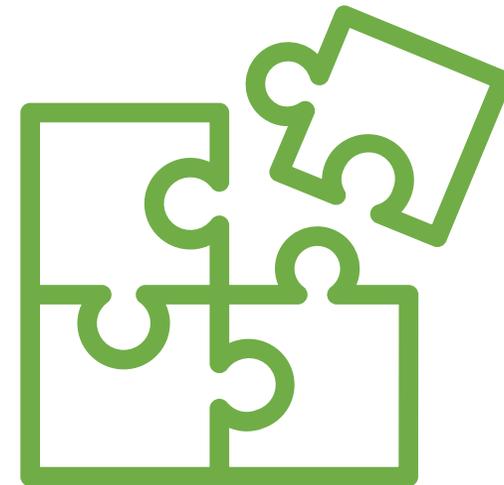
➤ What Happens During the Claims Validation Process?.



Step 2: Provider performs visit maintenance and resolves any visit exceptions in their Sandata EVV system. Provider confirms visits are in a verified status prior to submitting claims.



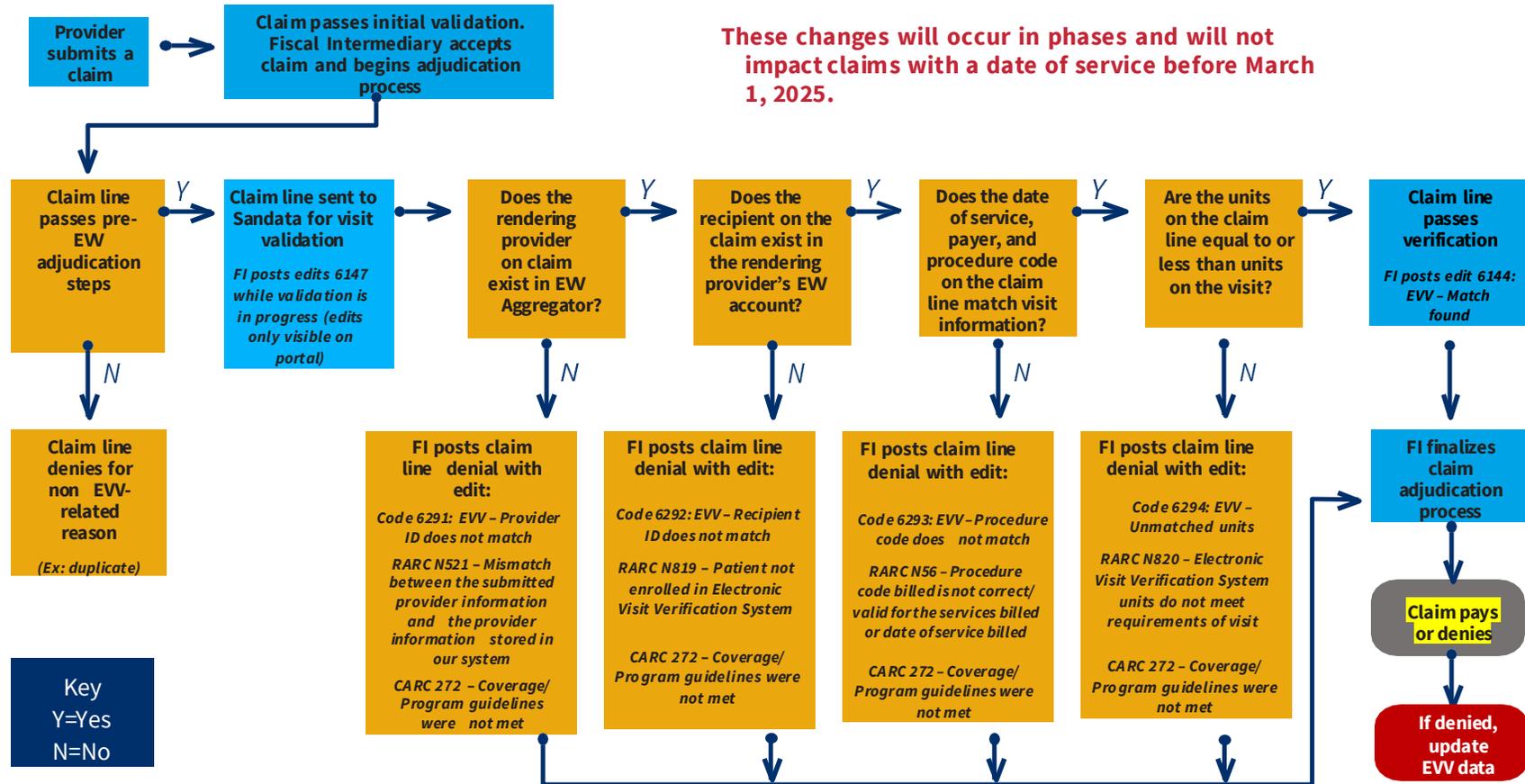
Step 3: Payer can now match claims to EVV visits.



Electronic Visit Verification Claims Validation Process.



ELECTRONIC VISIT VERIFICATION PROCESS





What is an Exception?



An exception occurs when one of the required EVV elements is missing or incorrect, such as the Recipient ID, DCW or Independent Provider ID, Service, Location, Date or Start and End time of service.



Exception Legend in Visit Maintenance



Legend [X]

Highlight colors

- Exception
- Multiple Recipient with the same phone
- Visit Created Manually
- Task(s) Exist for Visit
- FWV Device Indicator

Icons/Acronyms

- GPS R - GPS Distance Within Range
- GPS E - GPS Distance Exception
- GPS U - GPS Distance Unknown
- MC - Manual Call
- VRC - Recipient Voice Recording
- MRC - Missing Reason Code

CLOSE

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE
[REDACTED]	[REDACTED]	SPHH Nsg - LPN (G0300)	02/19/2025
[REDACTED]	[REDACTED]	SPHH Nsg - RN (G0299)	02/18/2025
[REDACTED]	[REDACTED]	Passport - PCA (T1019)	02/14/2025
[REDACTED]	[REDACTED]	[REDACTED]	02/13/2025
[REDACTED]	[REDACTED]	[REDACTED]	02/10/2025
[REDACTED]	[REDACTED]	Passport - PCA (T1019)	02/09/2025
[REDACTED]	[REDACTED]	Passport -	

Note: This is mock data that is used only for training purposes.

Steps to Locate Visit Maintenance



1. Navigate to the Visit Maintenance module
2. You will see exceptions from the current day.

Note: Use the filter button to change date range.

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIC
HHAeXchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM		00:41	Verified	<input type="checkbox"/>	3	
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete	<input type="checkbox"/>	1	
Sandata, Sandy	Dowdrick, Eric	SPHH Nsg - RN (G0299)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM		01:00	Verified	<input type="checkbox"/>	4	
Sandata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025				08:27 AM	09:00 AM	00:33	08:27 AM	09:30 AM	01:03	01:03	Verified	<input type="checkbox"/>	5	
(772)237-9616	Doe, Joey		10/20/2025				11:56 AM			11:56 AM			[--]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Doe, Joey		10/20/2025				08:00 AM			08:00 AM			[--]	Incomplete	<input type="checkbox"/>	0	
(772)237-9616	Doe, Joey		10/17/2025				04:12 PM			04:12 PM			[--]	Incomplete	<input type="checkbox"/>	0	

Note: This is mock data that is used only for training purposes.

Select Reason Code for an Exception



Select the **Reason Code** for the exception and add an optional **Reason Note** to explain the reason for the exception.

* indicates required field

Reason Code *

Select Reason Code

Select Reason Code

99 Documentation on file supports manual change

Reason Note

DCW forgot to clock in - verified time with rec...

SAVE

Note: This is mock data that is used only for training purposes.



Visit Maintenance Overview Demo

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





Knowledge Check – Visit Maintenance Overview



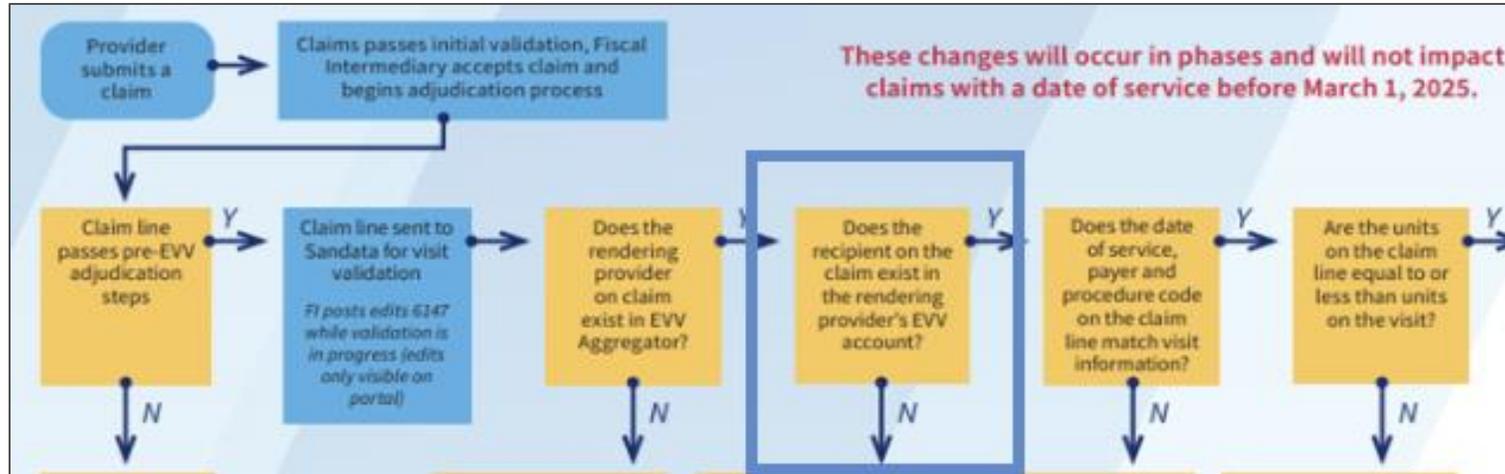
I'm trying to locate my visits from last week, but when I navigate to the Visit Maintenance screen, no data appears. What should I do to make sure this information is visible?

- A. Ensure Filters have been updated to reflect the proper Date range.
- B. Only exceptions appear on this screen; this means there are no exceptions.
- C. Recipient status needs to be in an active status for the visit data to show up.
- D. Select **Export Data** for the information to appear.

How to Resolve for Missing Medicaid ID

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Why is the Medicaid ID important?



The **Recipient ID** is automatically generated when you created a Recipient in Sandata EVV. The **Medicaid ID** is a required field on the Recipient record and is needed upon Recipient creation.

- In some instances (such as with a newborn) there may not be a Medicaid ID available when creating the Recipient.
- Visits missing the Medicaid ID prevents the visit from being verified.
- **Note:** There is no visible exception – use Filters to locate missing Medicaid ID when performing visit maintenance.



How can I locate visits where the Medicaid ID is missing?

1. Navigate to **Visit Maintenance** > select the **Filter** icon.
2. Select **Exception Types** in **Visits by Field**.
3. Select **Missing Medicaid ID** in **Exception Types** field.
4. Select **Apply Filters** to review results.

The screenshot displays the Sandata Home Care Visit Maintenance interface. The main area shows a table of visits with columns for Recipient Name, DCW/Employee Name, Service, Visit Date, Scheduled Time In/Out, Scheduled Hours, Call In/Out, Call Hours, Adjusted In/Out, and Adjusted Hours. The table contains four rows of data, with a total call time of 02:22. The filters sidebar on the right is open, showing various filter options. The 'Filter Visits By' dropdown is set to 'Exception Types', and the 'Exception Types' dropdown is set to 'Missing Medicaid ID'. Other filter options include From Date, To Date, Recipient, DCW/Employee, Payer, Program, Service, Category, Visit Status, Recipient Medicaid ID, Call Type, DCW/Employee Other ID, Supervisors, Department, and Group Visit.

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT
HHAExchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM
Sandata, Sandy	Dowdrick, Eric	SPHH Nsg - RN (G0299)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM
Sandata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025				08:27 AM	09:00 AM	00:33	08:27 AM	09:30 AM



Recipient Medicaid ID

1. Navigate to **Recipients > Recipient Management**.
2. **Filter** to the name of the Recipient that is incorrect; select their **Status** to open the Recipient record.
3. Navigate to the **Program** tab > navigate to **Status**.
4. Select **Discharged** from dropdown options.
5. Create a New Recipient record with the correct or updated Medicaid ID.
6. **Note:** ODA or Newborn recipient profiles, add Medicaid ID in Payer Details.

The screenshot displays the 'Recipient Management' interface. The 'Payer Details' section includes fields for Payer Name (ODM), Rank (1), Recipient Payer ID (-), Start Date (-), Medicaid ID (redacted), Group Number (-), and End Date (-). A dropdown menu is open, showing status options: Active, Pending, Active, On Hold, Discharged (highlighted with a blue border), and Cancelled. The 'Authorization Details' section features toggle switches for 'Voided Auth.' and 'Expired Auth.', an 'ADD AUTHORIZATION' button, and fields for Payer (ODM), Service (T1019), Event Code (NONE- None), Start Date (11/08/2024), Comment (-), Total Maximum (0), Total Used (0), Authorization No. (redacted), Modifiers (-), Format (Units), End Date (10/03/2050), Total Missed (0), and Total Remaining (0).

[Creating a New Recipient](#)

How to Resolve for Unknown Recipient Exception

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Unknown Recipient Exception



Cause: Visit occurred where the Recipient ID was not entered in the call.

Example: DCW did not know Recipient's ID number and recorded the Recipient name in the Memo section.

Resolution: Search for a Recipient and add them to the visit.

Creating A New Recipient

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
(213)205-0998	Employee, Translator	●	02/13/2025				07:37 PM	●		07:37 PM			Incomplete	<input type="checkbox"/>		

Unknown Recipients

Note: This is mock data that is used only for training purposes.



Steps to Resolve Unknown Recipient Exception



1. Navigate to **Visit Maintenance** and locate the visit.
2. Select the red dot under the **Service** column.
3. Navigate to the **Memo** tab and verify if recipient name is listed.
Note: Contact DCW to confirm recipient name if this record is not available.
4. In **Find Recipient** section, use filters to enter Recipient name and select **Apply Filters**.
5. Locate and select the Recipient.
6. Select **Reason Code**, enter reason note (optional), and select **Save**.



How to Resolve Unknown Recipient Exception Demo

- Navigate Modules
- Dashboard
- Recipients
- DCW/Employees
- Scheduling
- Visit Maintenance
- Reports
- XREF
- Security
- Messaging

CREATE VISIT

CREATE CALL

FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

APPROVE ALL

DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTION
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete	<input type="checkbox"/>	1	
(772)237-9616	Doe, Joey		10/20/2025				11:56 AM			11:56 AM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Doe, Joey		10/20/2025				08:00 AM			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	0	
(772)237-9616	Doe, Joey		10/17/2025				04:12 PM			04:12 PM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Doe, Joey		10/17/2025				03:36 PM			03:36 PM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, Jane	Doe, Jay		10/17/2025				08:00 AM			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Test, TestOne	MyCare - Waiver Choices HCAS (T2025)	10/17/2025	06:00 AM	07:00 AM	01:00							[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Test, TestOne	MyCare - Waiver Choices HCAS (T2025)	10/10/2025	06:00 AM	07:00 AM	01:00							[---]	Incomplete	<input type="checkbox"/>	0	
		MyCare -															



How to Resolve Missing Call In/Outs

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Visit Missing In/Out Calls



Cause: A visit that is recorded without an in and/or out call.

Example: A DCW clocks in for visit but does not clock out (or vice versa).

Resolution: Confirm time with Recipient and DCW and manually enter time of completion (either call in or out).

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete
Doe, Jane	Doe, Joey		10/20/2025				11:56 AM			11:56 AM			[---]	Incomplete

Steps to Resolve Missing In/Outs



1. Navigate to Visit Maintenance and locate the visit.
2. Select the red dot under the Call In or Call Out column.
3. In the **Add Manual Call** section, enter the **Call Date**, **Call Time**, **Service**, and **Location** of the visit.
4. Select **Reason Code**, enter reason note (optional), and select **Save**.



How to Resolve Missing Call In/Out Demo

CREATE VISIT

CREATE CALL

FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

APPROVE ALL

DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTION
HHAExchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM		00:41	Verified	<input type="checkbox"/>	3	
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete	<input type="checkbox"/>	1	
Sandata, Sandy	Dowdrick, Eric	SPHH Nsg - RN (G0299)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM		01:00	Verified	<input type="checkbox"/>	4	
Sandata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025				08:27 AM	09:00 AM	00:33	08:27 AM	09:30 AM	01:03	01:03	Verified	<input type="checkbox"/>	5	
Doe, Jane	Doe, Joey		10/20/2025				11:56 AM			11:56 AM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Doe, Joey	MyCare - PCA (T1019)	10/20/2025				08:00 AM			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	0	
(772)237-9616	Doe, Joey		10/17/2025				04:12 PM			04:12 PM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Doe, Joey		10/17/2025				03:36 PM			03:36 PM			[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Doe, Joey	MyCare - Waiver Choices HCAS (T2025)	10/17/2025				02:00 PM	02:21 PM	00:21	02:00 PM	02:21 PM		00:21	Verified	<input type="checkbox"/>	2	
Doe, John	Doe, Joey		10/17/2025				08:00			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	0	

How to Resolve Unauthorized Service Exception

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Unauthorized Service Exception



Cause: This error could be caused by a variety of issues including:

- Missing, incorrect or expired EVV authorization
- Missing or incorrect service code
- Missing or incorrect Payer and/or Program

Example: DCW selects the incorrect service during an unknown visit.

Resolution: Verify the authorization on the Recipient is entered and correct. If authorization is correct, update the service on the call to match.

RECIPIENT NAME	DCW/EMPLOYEE NAME	PAYER	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS
Bull, Elaine	Trainer, OHIOProvider		MyCare - PCA (T1019)	12/16/2024				● 03:27 PM				03:27 PM		[---]	Incomplete	<input type="checkbox"/>	



Steps to Resolve Unauthorized Service Exception



1. Navigate to **Visit Maintenance** and locate visit.
2. Select the red dot under the **Service** column
3. Review the **Recipient name, Payer, Program, and Service** associated to this visit.
4. Navigate to **Recipient > Recipient Management** and locate the Recipient using Quick Search or Filters.
5. Select **Recipient Name** to view their record; select the **Program** tab.
6. Confirm that the **Payer, Program, Service and Authorizations** are entered and correct. If not, make required changes.
7. If the information is correct, return to Visit Maintenance; on the **General** tab of the visit, make necessary corrections to the **Payer, Program, and Service**.
8. Select **Reason Code**, enter reason note (optional), and select **Save**.



How to Resolve Unauthorized Service Exception Demo

Sandata Home Care

- Navigate Modules
- Dashboard
- Recipients
- DCW/Employees
- Scheduling
- Visit Maintenance**
- Reports
- XREF
- Security
- Messaging

Visit Maintenance / Manage Visits

CREATE VISIT **CREATE CALL**

FILTERS **SHOW DISPLAY OPTIONS** **EXPORT DATA**

APPROVE ALL **DISAPPROVE ALL**

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	AI H
HHAExchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM	
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM	
Sandata, Sandy	Dowdrick, Eric	RN Consultation (T1001)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM	
Sandata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025				08:27 AM	09:00 AM	00:33	08:27 AM	09:00 AM	
									Total: 02:22			

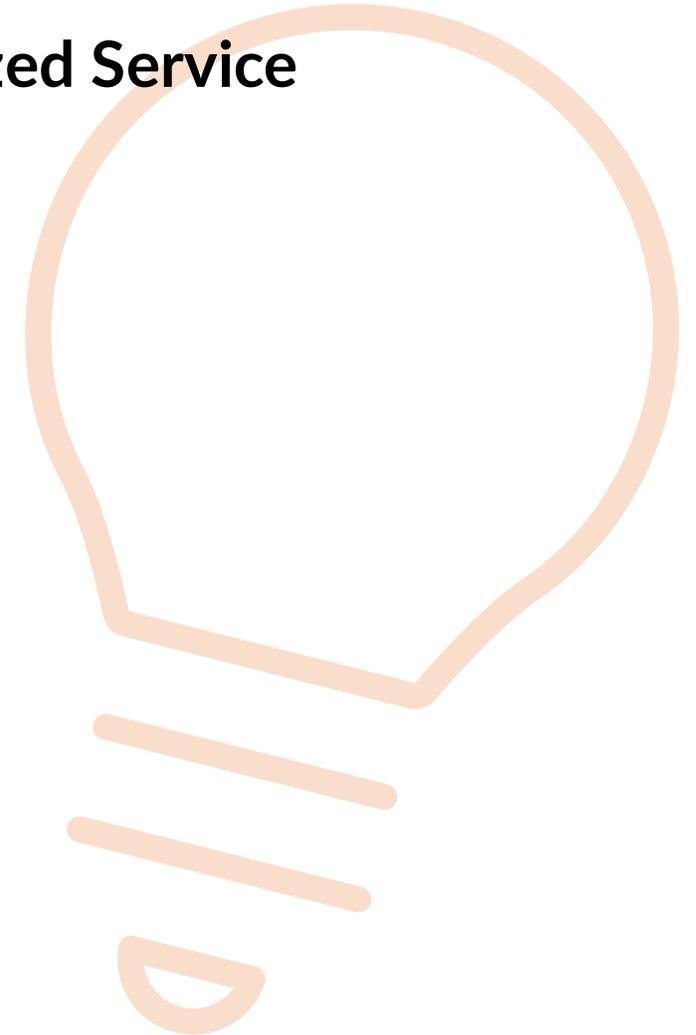


Knowledge Check – Unauthorized Service Exception



Which of the following does NOT cause an Unauthorized Service exception? Select one.

- A. Authorization is missing.
- B. Incorrect Recipient on visit.
- C. Incorrect Service Code on visit.
- D. Authorization is incorrect.



Creating a Manual Visit

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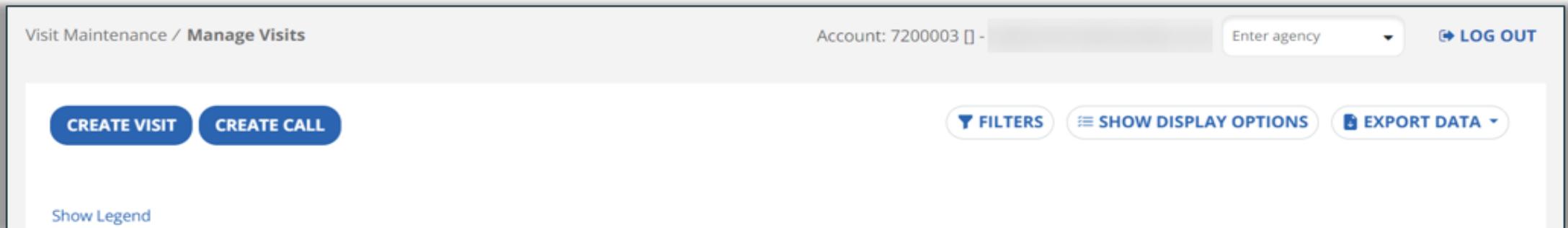
What if I Need to Create a Visit?



Cause: DCW should capture all visits, but sometimes circumstances arise, such as the phone's battery has died, or rushing between visits.

Example: DCW does not clock in/out for a visit.

Create Visit: Create a manual visit using **Create Visit** button.



Steps to Creating a Manual Visit



1. Navigate to Visit Maintenance and select **Create Visit**.
2. Use the filters icon to locate the recipient; once recipient is found and selected, select **Next**.
3. Use the filters icon to locate DCW; once DCW is found and selected, select **Next**.
4. Enter the visit details, which includes **Call Date, Call In Time, Call Out Time, Location, Service**.
5. Select **Reason Code**, enter **Reason Note** (optional), and select **Save**.



Creating a Manual Visit Demo

- Q Navigate Modules
- Dashboard
- Recipients
- DCW/Employees
- Scheduling
- Visit Maintenance**
- Reports
- XREF
- Security
- Messaging

CREATE VISIT **CREATE CALL**

FILTERS

There are no records matching the provided search criteria



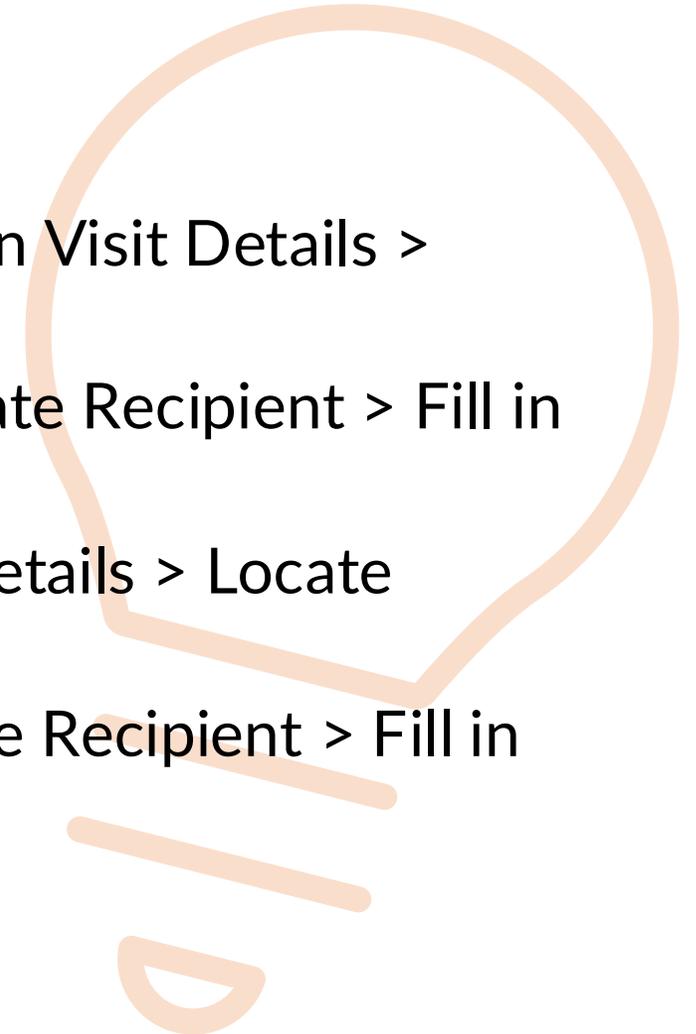
Need some guidance? Use this ^x
OH User Training Guide!

Knowledge Check – Creating a Manual Visit



What are the steps to creating a manual visit?

- A. Navigate to Visit Maintenance > Create Visit > Fill in Visit Details > Locate Recipient.
- B. Navigate to Visit Maintenance > Create Visit > Locate Recipient > Fill in Visit Details.
- C. Navigate to Recipient > Create Visit > Fill in Visit Details > Locate Recipient.
- D. Navigate to DCW/Employee > Create Visit > Locate Recipient > Fill in Visit Details.





Reminder: 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: 8:45 pm – 12:30 am

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

GENERAL
RECIPIENT
DCW/EMPLOYEE
CALL LOG
SPLIT DETAILS
EXCEPTIONS
GPS

PAYER	PROGRAM	SERVICE	
DODD	DD	Residential Respite (RR)	
VISIT 1 - 07/27/2025			
FROM TIME	TO TIME	BILL HOURS	UNITS
08:47 PM	12:00 AM	03:13	13
VISIT 2 - 07/28/2025			
FROM TIME	TO TIME	BILL HOURS	UNITS
12:00 AM	12:30 AM	00:30	2

[Unit Conversion Table](#)



Key Takeaways

Key Takeaways:



- Ensure that all visits are in a verified status prior to submitting claims.
- Perform Visit Maintenance regularly; resolve exceptions. Independent Providers will also need to perform visit maintenance regularly in Sandata EVV Portal.
- Create missing visits manually prior to submitting claims.
- **Reminder:** Alt EVV providers will perform Visit Maintenance in their Alt EVV system. This information is sent to Sandata EVV. Please log in to the Sandata Aggregator to confirm that visits are in a verified status prior to submitting claims.



Resources



Provider Resources



- [Ohio User Guides](#)

Top Visit Maintenance Errors and How to Resolve:

- [Managing Exceptions](#)
- [Updating an Unknown Recipient](#)
- [Adjusting Call Times and Dates](#)
- [Ohio Claims Validation: Handling Claims Denials- Sandata Technologies](#)

Visit Maintenance:

- [Visit Maintenance](#)

DODD Resources:

- [DODD Workflow](#)
- [Recorded Webinars](#)
- [DODD Webpage](#)

EVV Support



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
- 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

- [Ohio Department of Medicaid Website](#)
- [Electronic Visit Verification](#)

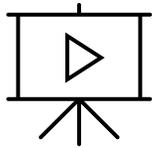


- [Sandata Mobile Connect Documentation](#)
- Documentation on:
 - Downloading and Logging in to mobile app.
 - Starting a visit using the mobile app.
 - [Ohio Service List](#)



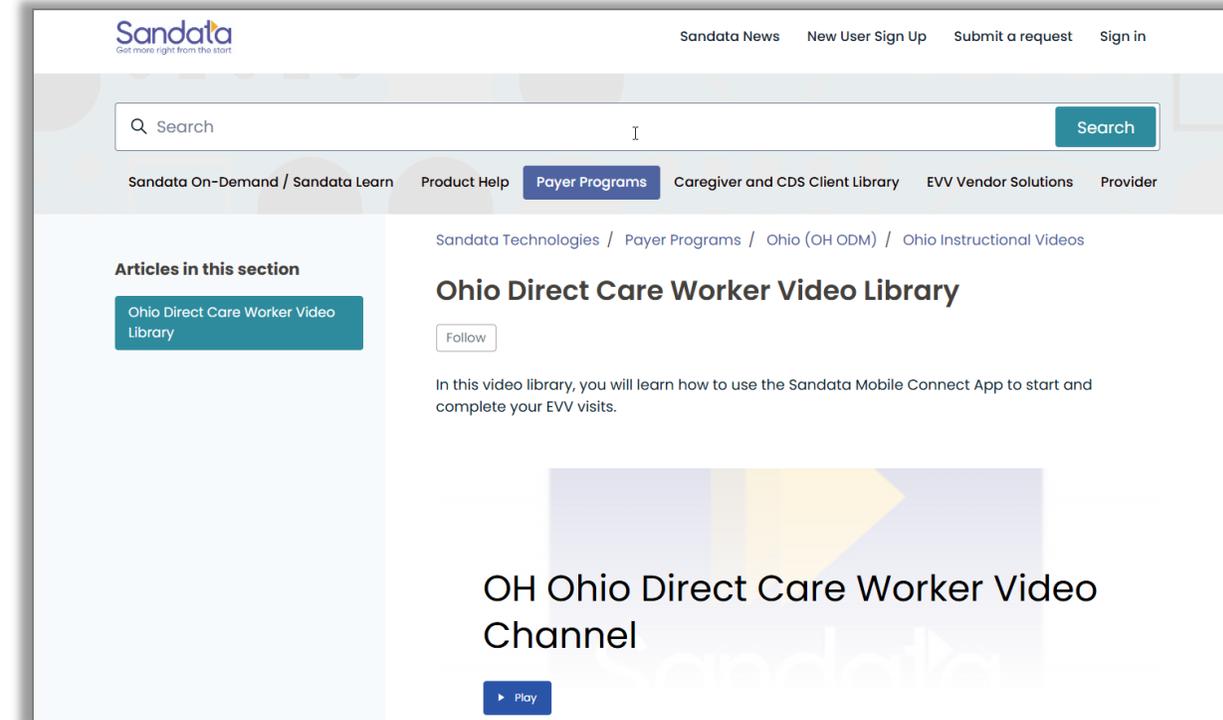
The screenshot shows the Sandata website interface. At the top, there is a search bar and navigation links for Sandata News, New User Sign Up, Submit a request, and Sign in. Below the search bar, there are navigation tabs for Sandata On-Demand / Sandata Learn, Product Help, Payer Programs (which is highlighted), Caregiver and CDS Client Library, EVV Vendor Solutions, and Provider. The main content area displays the breadcrumb trail: Sandata Technologies / Payer Programs / Ohio (OH ODM) / Ohio User Guides / Visit Capture / Sandata Mobile Connect (SMC) English. The title of the page is "Sandata Mobile Connect (SMC) English". Below the title, there is a "Follow" button and a list of links: Sandata Mobile Connect Login, Starting a Scheduled Sandata Mobile Connect Visit, Completing a Sandata Mobile Connect Visit, Starting an Unscheduled Sandata Mobile Connect Visit, and Starting an Unknown Sandata Mobile Connect Visit.

DCW/Employee 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





Questions?



Register for Upcoming Trainings

**THANKS FOR
ATTENDING!**



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