



Pennsylvania Department of Human Services Electronic Visit Verification (EVV)

Agency Provider Participant Guide

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v 1.3



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About this Course

This Instructor-led Training (ILT) course introduces Sandata Electronic Visit Verification (EVV) and is designed to facilitate training on the use of the system. The instructor will use this guide to lead each lesson with an overview of the topic in question, followed by a demonstration and hands-on practice of the skills required to execute activities within Sandata EVV.

Course Duration





The estimated time for this course is 1 day to cover the core EVV modules. Optional modules such as Scheduling and Billing will be available as self-paced learning topics in Sandata's Learning Management System (LMS).

Performance Objectives

- Navigate Sandata EVV
- Use the Security module to:
 - Create and modify users
 - Assign and modify roles/privileges to users
 - Delete/Reactivate users
 - Reset user passwords
 - Create roles and assign privileges
 - Change a password
- Use *Data Entry* to:
 - Manually input and maintain both clients and employees
 - Delete/Reactivate clients and employees
- Manually input and maintain both clients and employees
- Delete/Reactivate clients and employees

- Explain the purpose and basic functionality of Sandata Mobile Connect (SMC) and Telephonic Visit Verification (TVV)
- Use the Dashboard module to view real-time exceptions
- Use the Visit Maintenance module to manage, correct visit exceptions and add manual visit, as necessary
- Know the difference between Daily and Date Range reports
- Run both Daily and Date Range reports

Conventions Used in this Document

Convention	Description
<p>Bold Text</p>	<p>Used to alert a selection to be made or name of a field.</p>
	<p>Used to indicate an external tool or support (e.g. reference information) for instructors or participants.</p>
	<p>Used to indicate workflow.</p>
	<p>Use to highlight any risk management points.</p>
	<p>Used to highlight a key point of which the user should take notice.</p>
	<p>Used to indicate a tip and/or shortcut.</p>
	<p>Used to indicate instructor demonstration.</p>
	<p>Used to indicate participant should follow along with the instructor.</p>
	<p>Used to indicate participant should perform exercise independently.</p>

Course Agenda

Minutes	Module
10	Course Introduction
15	Program Overview
15	System Overview <ul style="list-style-type: none"> • Log in to Sandata EVV • Navigation • Common Functionality
30	Security (Office Staff) <ul style="list-style-type: none"> • Manage Users • Creating Users • Manage Roles
45	Client Module <ul style="list-style-type: none"> • Client Entry and Edit
30	Employee Module <ul style="list-style-type: none"> • Employee Entry and Edit
30	SMC / TVV <ul style="list-style-type: none"> • Device Call-In/Call-Out • Telephony Call-In/Call-Out
75	Visit Maintenance <ul style="list-style-type: none"> • Accessing Visit Maintenance • Understanding Filter and Sort Options • Understanding Visit Exceptions • Reviewing and Resolving Visit Exceptions
60	Group Visits <ul style="list-style-type: none"> • SMC/TVV • Visit Maintenance
20	Reports <ul style="list-style-type: none"> • Accessing Reports • Reviewing Report Types • Exporting Report Types
30	Wrap-up <ul style="list-style-type: none"> • Assessment & Evaluation • Wrap-up Assessment • Training Evaluation • Next Steps
90	Lunch and Breaks
450	Total Course Time

Overview/Objectives

This training guide is an in-depth review of the Sandata EVV environment pointing out features, structure and requirements. It covers the following topics:

- Accessing and Logging on and off Sandata EVV
- Using features and functions to navigate Sandata EVV
- User Set-up and Security
- Data Input into Sandata EVV – Clients and Employees
- Scheduling – creating and editing schedules
- SMC and TVV
- Digital Dashboard and Visit Maintenance
- Billing
- Accessing reports

The goal of this training is to present the functionality of Sandata EVV and to focus on the concepts of how Sandata EVV lends support in doing visit activities.

This class will be a combination of classroom instruction, handouts and practice exercises. At the end of the session, you will be asked to complete a Training Assessment exercise to reinforce the skills learned today, as well as an online training evaluation.

For the training exercises, we'll use a database that is designed specifically for training. We will not use real clients; therefore, the data cannot be harmed. The training database is a close copy of the production system, but clients and examples have been added to use during classes.

1 Program Overview

Module Time

15 minutes

This lesson introduces the Electronic Visit Verification (EVV) program. It provides an overview of the benefits and its core functionality.

Module Objectives

After completing this lesson, you will be able to:

- describe the 21st Century Cures Act; and
- describe the program objectives and the services under the program.

Key Terminology

Term/Acronym	Definition
Aggregator	Central data store for Sandata EVV and alternate data collection EVV systems
Alternate EVV System	Any EVV system that is not Sandata’s
EVV	Electronic Visit Verification
Fee-for-Service (FFS)	A payment model under which a provider is paid for every Medicaid eligible service rendered to the recipient.
Sandata Mobile Connect (SMC)	Sandata’s mobile visit verification application
Sandata EVV	Sandata Technologies Electronic Visit Verification system
Telephonic Visit Verification (TVV)	System used to record visit data and verification when SMC is not available

Introduction

Congress established a January 1ST, 2020 requirement for all states to use an EVV system, in accordance with the 21st Century Cures Act.

EVV is an electronic system that verifies when provider visits occur and documents the precise time services begin and end. The Sandata EVV system is provided free-of-charge for all providers.

Program Objectives

- Promote quality outcomes for clients (Quality of Care)
 - Ensure the health and welfare of clients choosing to receive long-term services and support where they live, or otherwise receive care in the community
- Reduce billing errors and contain costs (Program Integrity)
 - Improved payment accuracy by using technology to match data on claims with data in service documentation (e.g., time and duration of visit)

2 System Overview

Module Time

15 minutes

This lesson demonstrates how to log in to Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- access and log in to Sandata EVV;
- reset passwords;
- navigate Sandata EVV (with/without Americans Disabilities Act (ADA) support); and
- define common functions within Sandata EVV.

Key Terminology

Term	Definition
Americans with Disabilities Act (ADA)	The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability.
Job Access With Speech (JAWS)	Job Access With Speech is a computer screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or by a refreshable Braille display

Introduction

This document details the functionality of Sandata EVV. It is a web-based system accessed via Internet Explorer, Mozilla Firefox or Google Chrome web browsers. It allows for client/employee data entry, paperless review/approval of visits and reporting.

Browser Requirements

Sandata supports the current and prior major releases of Microsoft Internet Explorer, Mozilla Firefox and Google Chrome on a rolling basis. We then discontinue support for the third-most recent major release. This policy to support modern browsers allows us to take advantage of the most recent efficiencies in the browsers to maximize the user experience and also ensure our solutions are running on the most recent security and performance updates.

Overview

Sandata EVV consists of ten (10) sections. This document is divided into the following major sections:

- *Navigate Modules*
- *Security*
- *Clients*
- *Employees*
- *Scheduling*
- *SMC/TVV*
- *Dashboard*
- *Visit Maintenance*
- *Billing*
- *Reports*

Log-in Screen

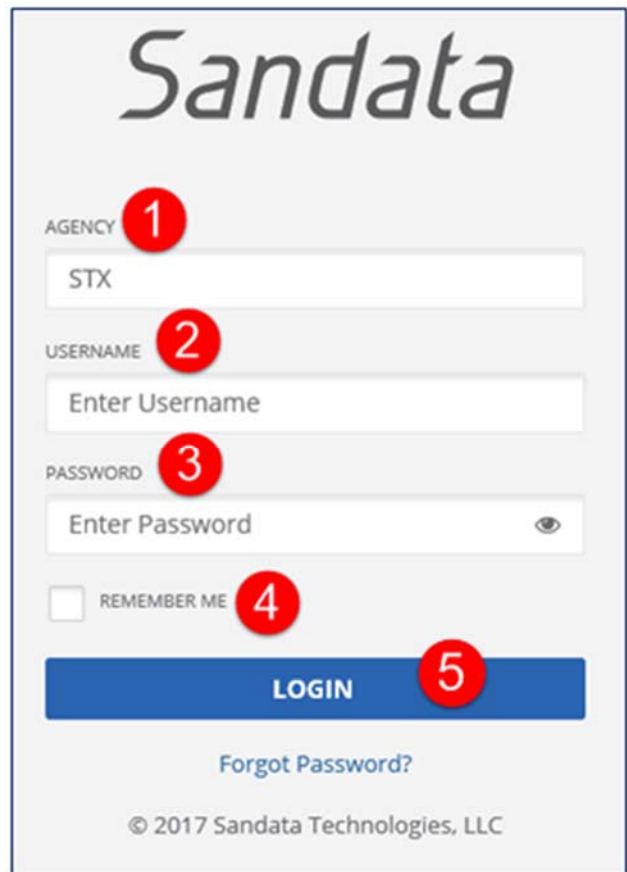
How to Log In

System security requires that you log on using the URL provided in the Welcome Kit. The Welcome Kit is provided upon completion of training.

Follow the steps below to log in to Sandata EVV for the first time:

- Agency EVV Security Administrator – use the credentials received in the Welcome Kit and click **LOGIN**
- All other Users – enter the credentials provided by the Agency EVV Security Administrator and click **LOGIN**

1. **AGENCY** – Example: STX##### (##### = account number)
2. **USERNAME** – The username is the email address used when creating a system user (username is not case sensitive).
3. **PASSWORD** – Must be at least twelve characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (@#\$%^). The password is case sensitive.
4. **REMEMBER ME** – When enabled, this checkbox will preserve the last Agency and Username entered.
5. **LOGIN** – gain access to Sandata EVV.



The image shows the Sandata login interface. At the top is the Sandata logo. Below it are five input fields and a button, each with a red circle containing a number from 1 to 5. 1. AGENCY: A text box containing 'STX'. 2. USERNAME: A text box with the placeholder 'Enter Username'. 3. PASSWORD: A text box with the placeholder 'Enter Password' and a small eye icon to its right. 4. REMEMBER ME: A checkbox followed by the text 'REMEMBER ME'. 5. LOGIN: A large blue button with the text 'LOGIN' in white. Below the button is a link that says 'Forgot Password?'. At the bottom of the form is the copyright notice '© 2017 Sandata Technologies, LLC'.



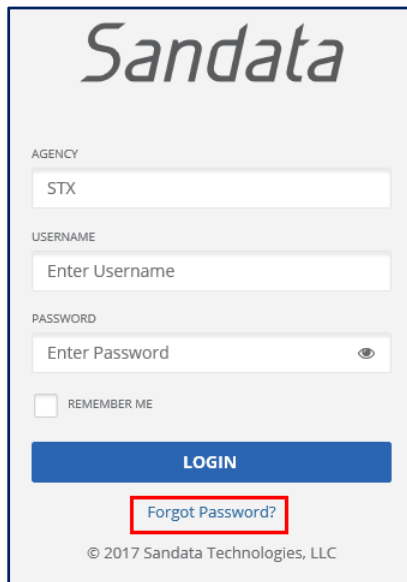
REMEMBER ME – When checked, preserves the last username entered.

How to Reset a Forgotten Password

Passwords need to be reset at regular intervals, based on EVV Program requirements. A user will begin receiving prompts 10 days before their password expiration date to reset the password.

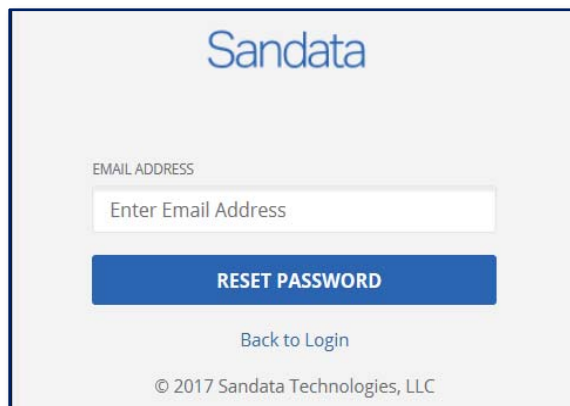
There can be times when a password is forgotten and it is necessary to reset the password (e.g., a new user forgets what they set as their password during the initial login process).

1. Click **Forgot Password?** A window opens to enter the email address to receive a temporary password.



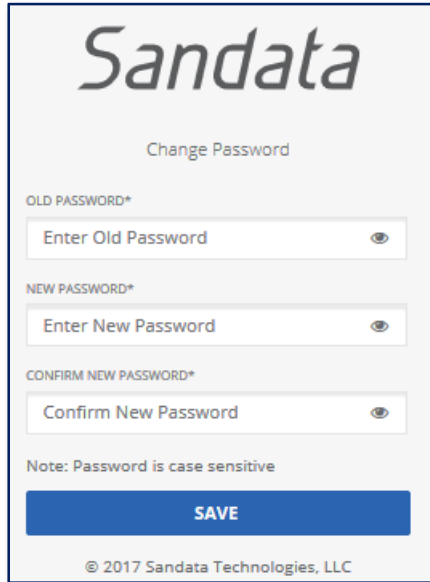
The image shows the Sandata login interface. At the top is the Sandata logo. Below it are three input fields: 'AGENCY' with 'STX' entered, 'USERNAME' with 'Enter Username' as a placeholder, and 'PASSWORD' with 'Enter Password' as a placeholder and a visibility icon. Below the password field is a 'REMEMBER ME' checkbox. A blue 'LOGIN' button is centered below the fields. A red box highlights the 'Forgot Password?' link below the login button. At the bottom is the copyright notice '© 2017 Sandata Technologies, LLC'.

2. Enter the **EMAIL ADDRESS** (username) used to log in.



The image shows the Sandata forgot password interface. At the top is the Sandata logo. Below it is an 'EMAIL ADDRESS' input field with 'Enter Email Address' as a placeholder. Below the input field is a blue 'RESET PASSWORD' button. Below the button is a 'Back to Login' link. At the bottom is the copyright notice '© 2017 Sandata Technologies, LLC'.

3. Click **RESET PASSWORD**. The system sends an email with a temporary password.
4. Click **Back to Login**. The *Login* screen displays.

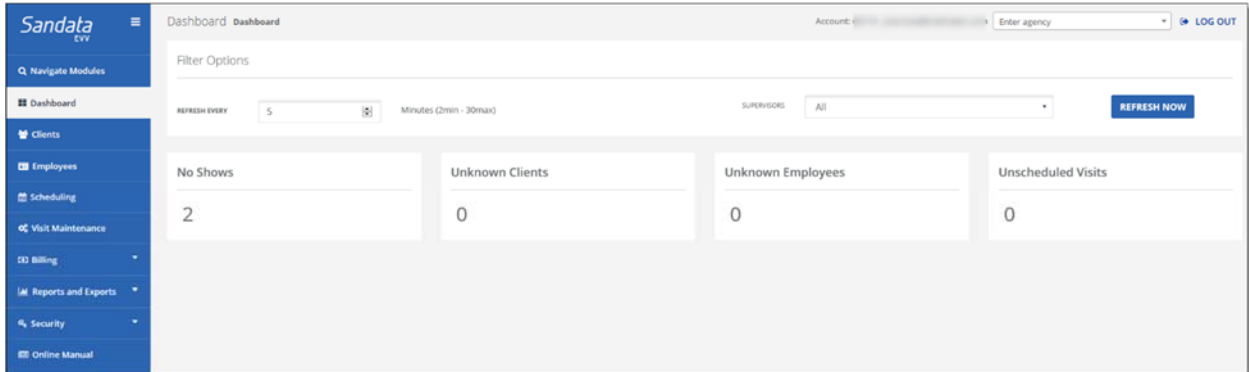


The screenshot shows a web form titled "Sandata Change Password". It contains three password input fields: "OLD PASSWORD*", "NEW PASSWORD*", and "CONFIRM NEW PASSWORD*", each with a placeholder text and a toggle icon. Below the fields is a note: "Note: Password is case sensitive". At the bottom is a blue "SAVE" button and a copyright notice: "© 2017 Sandata Technologies, LLC".

5. Enter the temporary password in the **OLD PASSWORD*** field.
6. Create and enter a new password in the **NEW PASSWORD*** field.
7. Re-enter the password in the **CONFIRM NEW PASSWORD*** field.
8. Click **SAVE**.

Navigating Sandata EVV

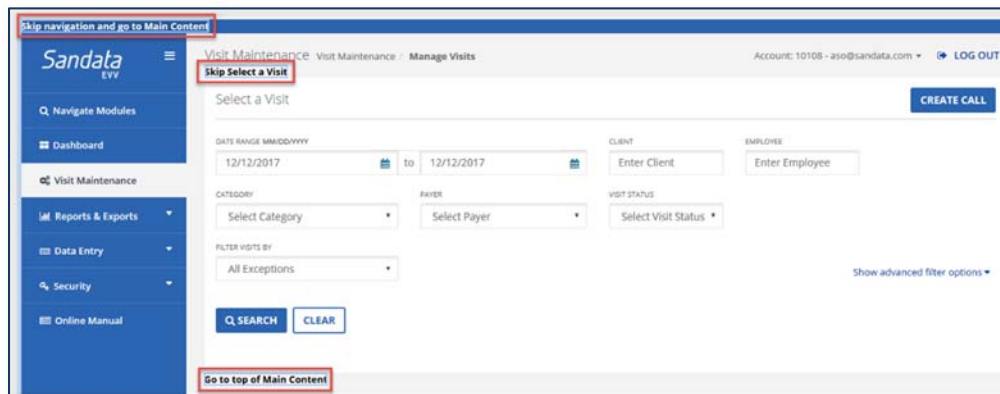
After successful login, the *Dashboard* screen displays.



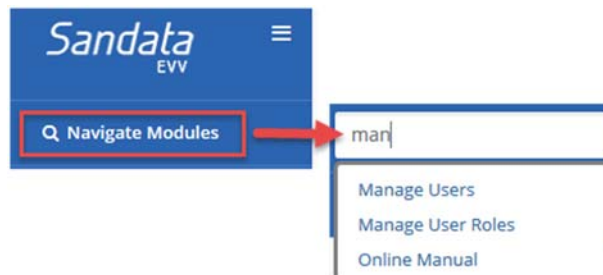
ADA Navigation Support

Sandata EVV can be navigated using only the keyboard. It is also Job Access With Speech (JAWS) Reader compliant. Below is the *Visit Maintenance* screen. The *Visit Maintenance* screen displays immediately after log in.

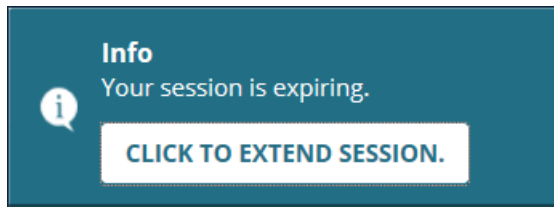
1. Using the <Tab> key to move through the system, the links below display individually. They allow you to skip the navigation options and begin with the main content.



2. Clicking **Navigate Modules** on the *Navigation* panel opens the **Navigate Modules** field. This allows users to jump between screens by typing the name of the screen in the field. A link to the screen displays below the field. Click the link to navigate to the page.

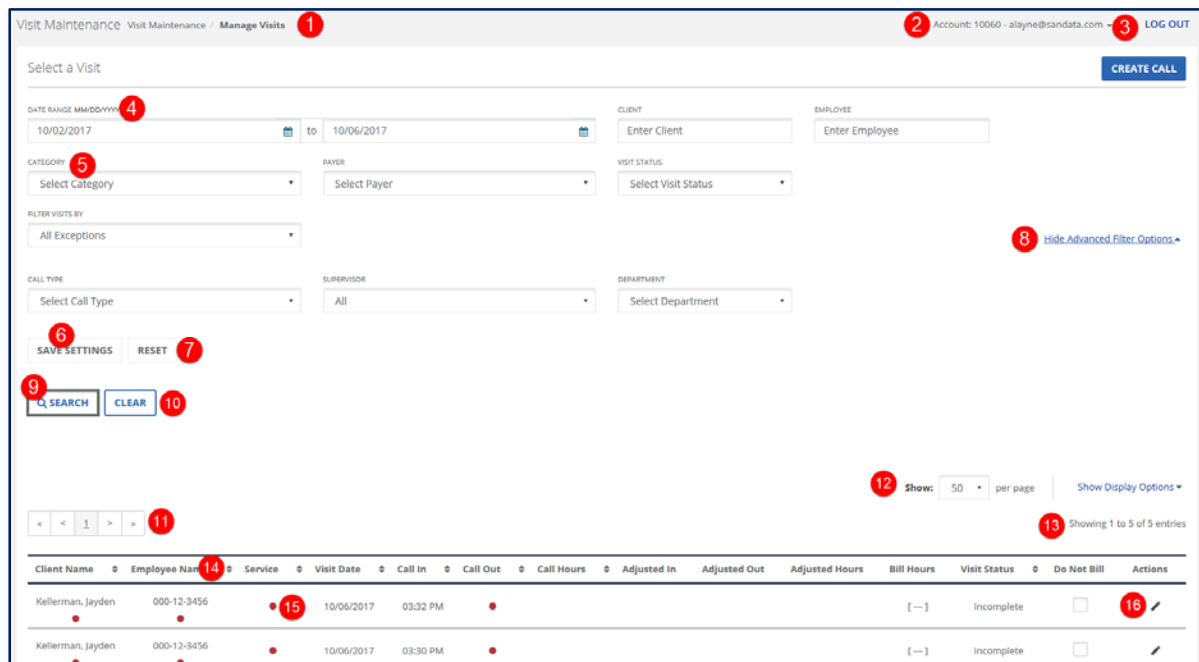


- To accommodate users that require more time, when a user remains idle for specified period of time, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 (two) minutes, Sandata EVV automatically times out.



Common Functions of Sandata EVV

This section describes common functions within Sandata EVV. Here is an example with the different items that are typically displayed.







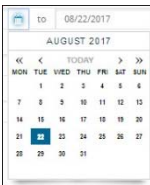
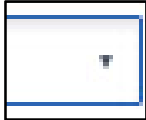
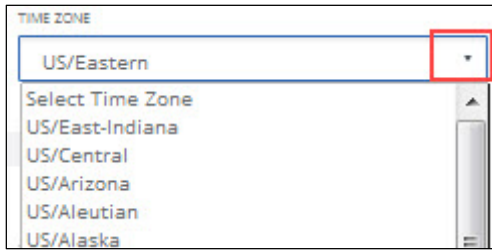
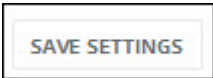
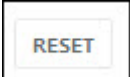
The screenshot shows the 'Manage Visits' interface with the following numbered callouts:

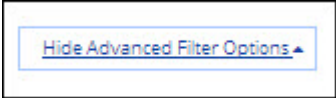


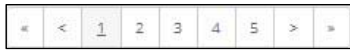





- 1: Manage Visits breadcrumb
- 2: Account: 10060 - alayne@sandata.com
- 3: LOG OUT button
- 4: DATE RANGE MM/DD/YYYY (10/02/2017 to 10/06/2017)
- 5: CATEGORY dropdown
- 6: SAVE SETTINGS button
- 7: RESET button
- 8: Hide Advanced Filter Options link
- 9: SEARCH button
- 10: CLEAR button
- 11: Page navigation (1)
- 12: Show: 50 per page
- 13: Showing 1 to 5 of 5 entries
- 14: Employee Name (000-12-3456)
- 15: Service (red dot)
- 16: Actions (edit/delete icons)

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Kellerman, Jayden	000-12-3456	•	10/06/2017	03:32 PM	•					[--]	Incomplete	<input type="checkbox"/>	
Kellerman, Jayden	000-12-3456	•	10/06/2017	03:30 PM	•					[--]	Incomplete	<input type="checkbox"/>	

Common Functions in Sandata EVV



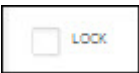

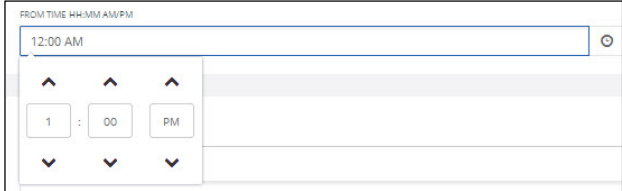





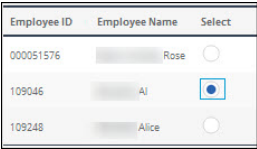



Here is a list of items commonly found in Sandata EVV.





	Item	Name	Description
1.		Navigation Path	System and which screen is displayed.
2.		Account and User Display	Displays the account the user is logged into and the username/email address of the user currently logged in. For more about these fields, see the section Sandata Header.
3.		Log Out Button	Logs the user out of the system and displays the log-in screen.
4.		Calendar Icon	Clicking this icon displays a calendar from which the user selects a date. 
5.		Show List Icon	Located in list fields, clicking this icon displays the list. 
6.		Save Settings Button	When advanced filter settings are displayed, this button will save selected search fields so that they will be displayed again at the next user login.
7.		Reset Button	If search settings have been saved, this button will clear them.

	Item	Name	Description
8.		Show/Hide Advanced Filter Options	On screens enabled for searches, clicking this link shows or hides any advanced filters that are available.
9.		Search Button	Executes a search.
10.		Clear Button	Clears a search field or series of search fields.
11.		Page Listing	This provides a button to go to the start and end of a list, along with the ability to display any individual page of the list.
12.		Number of Items per Page Setting	This setting allows users to select how many rows of a list are displayed on each page.
13.		Page Contents	This results display is shown on pages on which there are either lists or search results. Located at the top and bottom of each page, the results display shows the list entries displayed on each page, as well as the total number of rows in the list.
14.		List Sorting Icon	Located in lists and reports, users can sort the contents of a list by any column that has this icon in its header. Click to sort in ascending or descending order.
15.		Exception Indicator	When viewing search results for visits, any field marked by a red dot indicates data that is missing.
16.		Edit Button	Opens an individual record with its fields in an editable state.

Additional Buttons and Icons

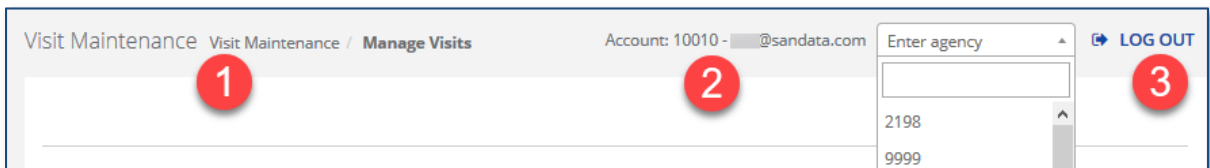
The following buttons are frequently displayed throughout the Sandata system:


Button	Function	Description
	Add Button	Clicking this button adds another row to a listing.
	Cancel Button	Cancels an operation and closes the screen.
	Check Box	Filling a check box enables a feature, clearing it disables it.
	Clock Icon	In fields that require a time to be entered, clicking this icon allows the user to select a time. 
	Create Button	Creates a new item in any list.
	Delete/Terminate Button	Moves an item/user to “Inactive” status. The User is prompted to confirm.
	Finish Button	Completes and terminates a task.
	Lock Icon	Displays the password to help with log-in and password entry.
	Play Icon	Starts a playback of the client Voice Verification recording.
	Radio Button	Radio buttons allow the user to select one or more items from a list.
	Reactivate Button	Moves and item/user to “Active’ status. User is prompted to confirm.
	Record Button	Pressing this button begins the client voice recording during the SMC call-out process.
	Refresh Button	Refreshes one or several fields on a screen, usually search fields.

Button	Function	Description
	Save Button	Located in <i>Data Entry</i> fields, this button saves the information that has been entered.
	Show Information Icon	Clicking this icon displays additional information about a system field. For example, at the login screen clicking this icon displays a password being typed in. <div data-bbox="824 625 1464 730" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> NEW PASSWORD <input type="password" value="1970MonteCarlo@"/> </div>
	Stop recording Button	Pressing this button stops the client voice recording during the SMC call-out process.
	Terminate Button	This button moves either a client record or an employee record to “Terminated” status.

Sandata Header

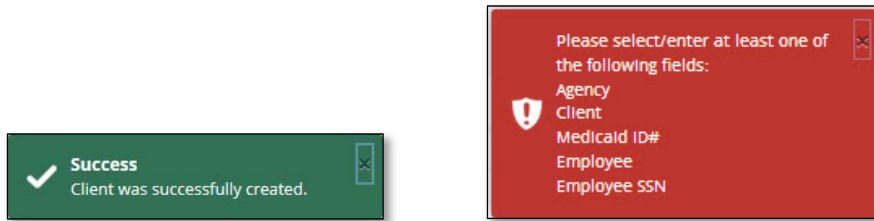
This header is located at the top of every screen in the Sandata EVV. It displays key information about each screen along with functionality to navigate between modules or to log out of the system.



	Function	Description
1.	Navigation Path	This field shows a user the exact location in the system and the current screen.
2.	Account and User Display	<p>Displays the account the user is logged into and the username/email of the user currently logged in.</p> <p><u>Moving Between Multiple Accounts</u></p> <p>Click the small arrow icon alongside the user name to display a list of accounts for which the user is authorized to access. Selecting the account number moves the user to that account without having to log out and log in again.</p> <hr/> <p> A user must have permissions to log into more than one account and the username must be the same across all accounts</p> <hr/> <p>The account the user is currently logged into is indicated by a check box.</p>
3.	Log Out	Logs the user out of the system and displays the login screen.





Confirmation and Error Messages

Confirmation and error messages are displayed at the top, center of the screen.



Assignment Buttons

These buttons are displayed whenever a screen has settings that require moving items between **Available** and **Assigned** fields, for example in the Security settings. The buttons allow single or multiple items to be added or removed.

Button	Function	Description
	Add All	This button moves all items from the Available field to the Assigned field.
	Add Item(s)	This button moves single or multiple items from the Available field to the Assigned field. Click on multiple items to add them together, if necessary.
	Remove Item(s)	This button moves single or multiple items from the Assigned field to the Available field. Click on multiple items to add them together, if necessary.
	Remove All	This button moves all Items from the Assigned field to the Available field.

3 Security (User Set-up)

Module Time

40 minutes

This lesson teaches how to set-up, create and maintain system users.

Module Objectives

After completing this lesson, you will be able to:

- define key terminology;
- access the security module;
- create and manage users;
- create and manage user roles; and
- change your password.

Key Terminology

Term	Definition
Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Client	A person who receives services through the Medicaid program.
Privilege	A single permission.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV.
Security	The module in Sandata EVV where users (office staff) are set up to use the system.
User	A person with a unique login and password to Sandata EVV.
Username	The user's email address.

Introduction

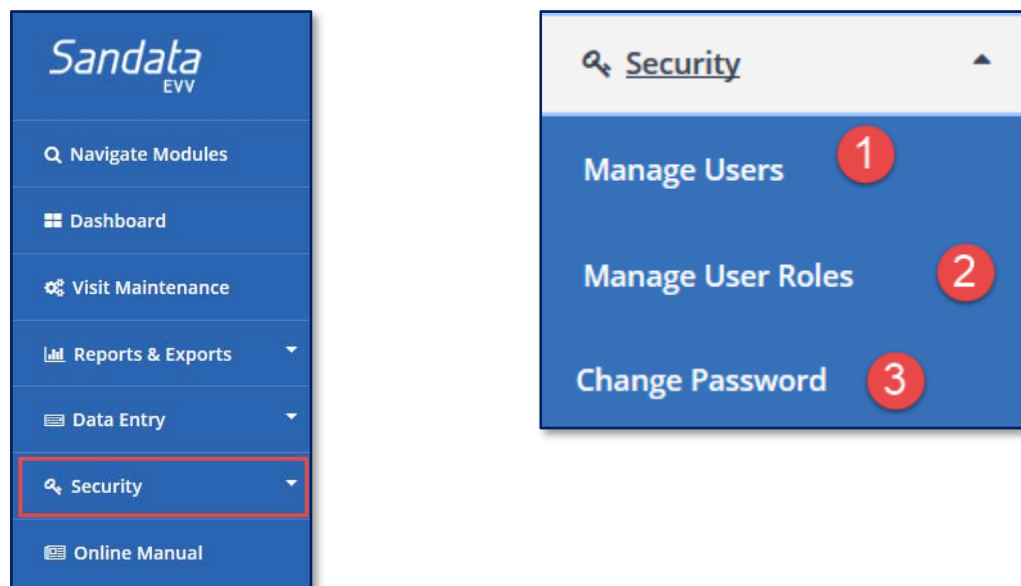
Sandata EVV Security Settings

The Security settings in Sandata EVV allow Administrators to to:

- assign user roles to specific users;
- create user roles and assign system privileges to those roles;
- assign system privileges;
- grant and revoke system privileges;
- reset user passwords; and
- reset own password.

Accessing Sandata EVV Security

From the Sandata EVV Main Menu click **Security**. The *Security* panel expands and displays three sections of security settings.



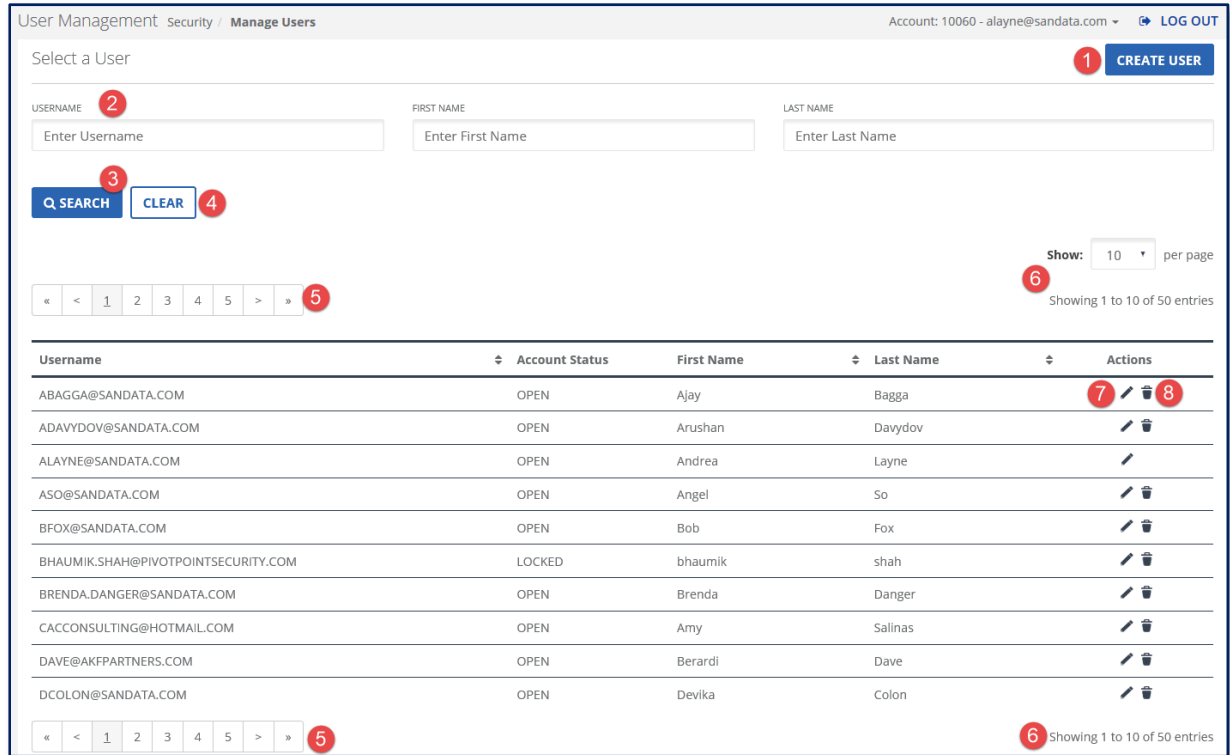
The security settings of Santrax EVV are divided into three sections:

1. **Manage Users** – This section allows the user to create and maintain users.
2. **Manage User Roles** – Roles allow the system administrator to group privileges and assign them to users of the EVV system.
3. **Change Password** – This section allows the logged in user to change his/her password.

Manage Users Screen Overview

This function allows the creation and management of users' access to Sandata EVV. Users are staff members that are authorized to use Sandata EVV. Their records can be searched, created

and deactivated. Attributes—user information, roles and privileges—can be edited. User accounts can also be locked and/or unlocked and, if necessary, a password can be reset.



The screenshot shows the 'User Management' interface with the following components:

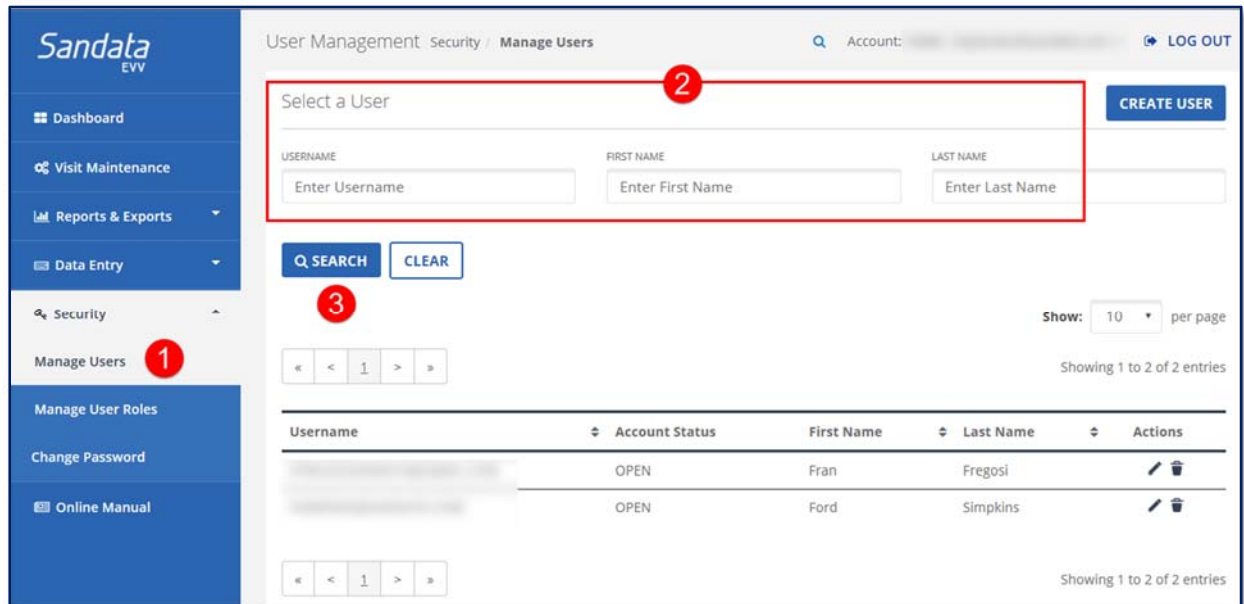
- 1. CREATE USER**: A button in the top right corner.
- 2. FILTERS**: Three input fields for 'USERNAME', 'FIRST NAME', and 'LAST NAME'.
- 3. SEARCH**: A button with a magnifying glass icon.
- 4. CLEAR**: A button to reset the filter fields.
- 5. PAGE NAVIGATION**: A set of arrows and page numbers (1-5) for navigating the list.
- 6. SHOW**: A dropdown menu set to '10 per page' and a text label 'Showing 1 to 10 of 50 entries'.
- 7. EDIT**: A pencil icon in the 'Actions' column for the first user.
- 8. DELETE**: A trash can icon in the 'Actions' column for the first user.

Username	Account Status	First Name	Last Name	Actions
ABAGGA@SANDATA.COM	OPEN	Ajay	Bagga	
ADAVYDOV@SANDATA.COM	OPEN	Arushan	Davydov	
ALAYNE@SANDATA.COM	OPEN	Andrea	Layne	
ASO@SANDATA.COM	OPEN	Angel	So	
BFOX@SANDATA.COM	OPEN	Bob	Fox	
BHAUMIK.SHAH@PIVOTPOINTSECURITY.COM	LOCKED	bhaumik	shah	
BRENDA.DANGER@SANDATA.COM	OPEN	Brenda	Danger	
CACCONSULTING@HOTMAIL.COM	OPEN	Amy	Salinas	
DAVE@AKFPARTNERS.COM	OPEN	Berardi	Dave	
DCOLON@SANDATA.COM	OPEN	Devika	Colon	

- 1. CREATE USER** – Used to create a new user profile.
- 2. Filters** – Allows for a search by either **USERNAME**, **FIRST NAME** or **LAST NAME** or a combination of the three.
- 3. SEARCH** – Retrieves the related information based upon the filters used.
- 4. CLEAR** – Deletes the information from the filter fields to allow for additional searches with new criteria.
- 5. Page Navigation** – Allows for navigating through the list using page numbers or arrows. The number of pages displayed is dependent upon the number of results.
- 6. Show** – Allows for input of how many entries are shown per page and displays the total number of results returned.
- 7. Edit** – Edit a user.
- 8. Delete** – Inactivate a user.

Searching for Users

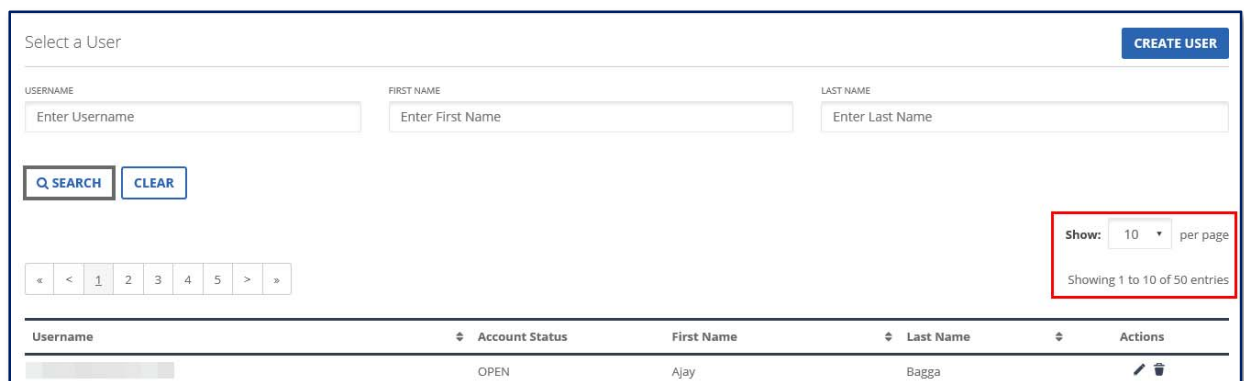
Search for users from the *Manage Users* screen.



1. Click **Security>Manage Users**.
2. Input the appropriate criteria (user name, first name or their last name) in the appropriate fields to filter the results.
3. Press **<Enter>** (on the keyboard) or click **SEARCH**.

If the user is found, their information displays. Depending on the criteria entered, multiple entries can display.


A search can be conducted with no criteria added, resulting in a complete list of users. Press **<Enter>** (on the keyboard) or click **SEARCH**.



Perform additional searches by clicking **CLEAR** and entering new search criteria.

Creating a New User

Create User Screen Overview



The screenshot shows the 'Create User' interface with the following elements and callouts:

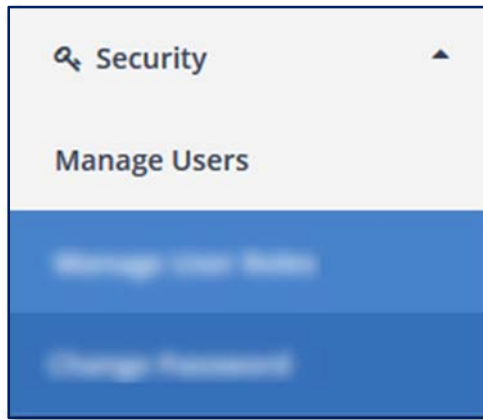
- 1**: USERNAME/EMAIL * input field
- 2**: LAST NAME * input field
- 3**: FIRST NAME * input field
- 4**: LOCKED checkbox
- 5**: AVAILABLE ROLES list (ASST_COOR, COORDINATOR, SECURITY_ADMIN)
- 6**: Role assignment buttons (» > < «)
- 7**: ASSIGNED ROLES list
- 8**: AVAILABLE PRIVILEGES list (Contract/Payer - Add Contract, Dashboard - Access Module, Email Address - Add, Email Address - Delete, Email Address - Update, Exports - Access Module, Holiday - Add, Holiday - Delete, Holiday - Update, Password - Update Expiration Setting, Privilege - Assign Privilege, Privilege - Revoke Privilege)
- 9**: ASSIGNED PRIVILEGES list
- 10**: Assign Supervisors to section, including SEARCH SUPERVISORS, Assign Supervisors to User (checked), ALL, and ASSIGNMENT buttons (> <)
- 11**: CREATE USER button

1. **USERNAME/EMAIL** – This field is to enter a user’s email address, which is also their username.
2. **LAST NAME** – User’s last name.
3. **FIRST NAME** – User’s first name.
4. **LOCKED** – If selected, prevents the user from logging into the system. It is unchecked by default.
5. **AVAILABLE ROLES** – The roles in this field are available for assignment.
6. **Assignment Buttons** – These buttons move items between the **AVAILABLE** and **ASSIGNED** fields.
7. **ASSIGNED ROLES** – The roles in this field are assigned to the user.
8. **AVAILABLE PRIVILEGES** – The privileges in this field are available for assignment.
9. **ASSIGNED PRIVILEGES** – The privileges in this field are assigned to the user.
10. **SUPERVISOR** – This functionality is available if clients are grouped by supervisor/coordinators.
11. **CREATE USER** – Creates the user and adds them in the system.

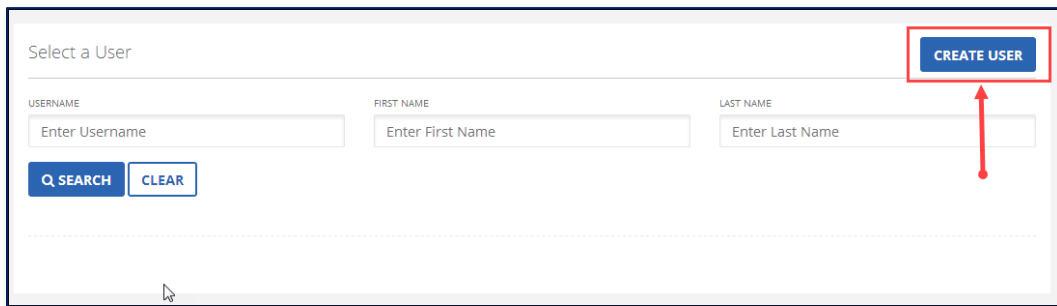


Follow along with the instructor to create a user.

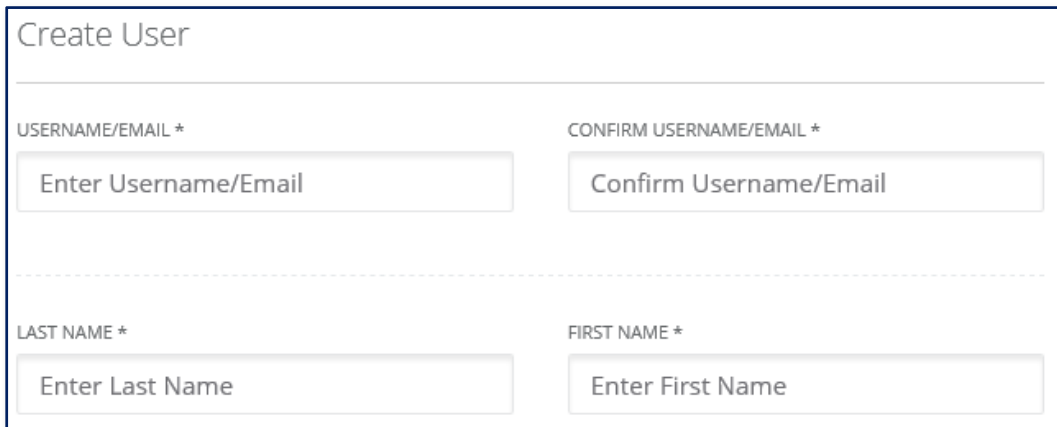
1. Click **Security>Manage Users** from the *Navigation* panel. The *Manage Users* screen displays.



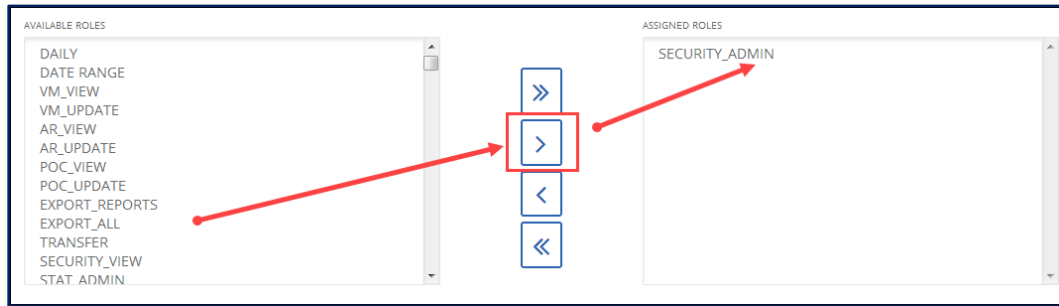
2. Click **CREATE USER**. The *Create User* screen opens.



3. Enter/Confirm the user's email address and their **LAST NAME** and **FIRST NAME**.



- The **LOCKED** checkbox prevents the user from logging into the system. Leave this field unchecked to allow the user to log in.
- Click the appropriate item in the **AVAILABLE ROLES** field and click the > button to move it into the **ASSIGNED ROLES** field. All user privileges assigned to the roles selected are granted to the user. Multiple roles can be assigned to a user, as necessary.



- Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.
- Click **CREATE USER**. A successful confirmation message displays.



If a user also provides care to a client, they must be added as an employee in Sandata EVV.







If any of the required fields are not filled out correctly or left blank, a tool tip message displays above the field to be completed.








Exercise: Create a User

Creating A New User as a Security Admin	
Task	Description
1.	Click the <i>Security Module</i> on the navigation panel and then click the <i>Manage Users</i> .
2.	Click the  button in the upper-right corner of the screen.
3.	Enter a username (Use the email extension of “@mailinator.com”. For example: <i>jsmith@mailinator.com</i>). Re-enter the username to confirm.
4.	Enter a Last Name and a First Name into the appropriate fields.
5.	Click the SECURITY_ADMIN role in the <i>Available Roles</i> box to highlight the role.
6.	Click the right pointer  to assign the Role the user.
7.	Click the double right pointer  under the Privileges section to assign all privileges to the Security Admin user.
8.	Click  in upper or lower right corners of the screen. A success screen appears at the top of the screen indicating the user was successfully created.

9.	<p>Open another web browser window and type in the URL: www.mailinator.com</p> <ol style="list-style-type: none"> a. Click in the Check Any Inbox! field and enter the first part of the email address you created (Using the example in step 3 above, you would enter <i>jsmith</i>) for the new user and click GO. b. Click on the <i>Sandata.evv Temporary Password</i> email displayed. c. Copy the temporary password and click the Login button. d. Enter your assigned training agency number e. Enter the email address for your new user f. Enter the temporary password you just copied and click LOGIN g. Enter the temporary password in the OLD PASSWORD* field (click the “eye” icon to display the password information) h. Enter a new password and re-enter the password to confirm i. Click SAVE <p>You are now logged in to Sandata EVV under the user new account.</p>
----	--

Creating A Second User As A Coordinator	
Task	Description
1.	Click the <i>Security Module</i> on the navigation panel and then click the <i>Manage Users</i> .
2.	Click the  button in the upper-right corner of the screen to create another user.
3.	Enter a username (Use the email extension of “@mailinator.com”. For example: <i>jsmith@mailinator.com</i>). Re-enter the username to confirm.
4.	Enter a Last Name and a First Name into the appropriate fields.
5.	Click the COORDINATOR role in the <i>Available Roles</i> box to highlight the role.
6.	Click the right pointer  to assign the role the user.
7.	Click the  button in upper or lower right corners of the screen. A Success pop-up appears at the top of the screen indicating the user was successfully created.


8.	<p>Open another web browser window and type in the URL: www.mailinator.com</p> <ul style="list-style-type: none">j. Click in the Check Any Inbox! field and enter the first part of the email address you created (Using the example in step 3 above, you would enter <i>jsmith</i>) for the new user and click GO.k. Click on the <i>Sandata.evv Temporary Password</i> email displayed.l. Copy the temporary password and click the Login button.m. Enter your assigned training agency numbern. Enter the email address for your new usero. Enter the temporary password you just copied and click LOGINp. Enter the temporary password in the OLD PASSWORD* field (click the “eye” icon to display the password information)q. Enter a new password and re-enter the password to confirmr. Click SAVE <p>You are now logged in to Sandata EVV under the user new account.</p>
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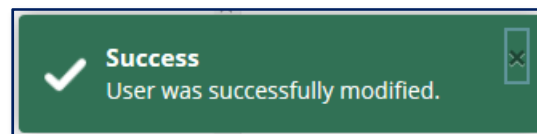
Modify a User



Follow along with the instructor to modify a user.


Modify User Roles/Privileges

1. Perform a user search.
2. Click **Edit**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Add/Remove any of the roles/privileges to modify the user account.
4. Click **MODIFY USER**. A successful confirmation message displays.



Lock/Unlock a User

If a user attempts to log in three (3) times in sequence with an incorrect password, they will be locked out. Follow these steps to unlock the user.


1. Perform a user search.
2. Click **Edit**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Check/Uncheck the **LOCKED** checkbox, as required.
4. Click **MODIFY USER**. A successful confirmation message displays.

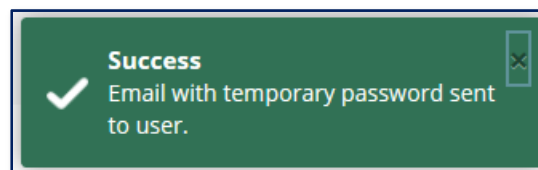
Resetting a User's Password

In addition to the ability to modify a user's information and privileges, the Administrator also has the ability to reset a user's password.



Follow along with the instructor to reset a user's password.


1. Perform a user search.
2. Click **Edit**  in the *Actions* column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Click **RESET PASSWORD**. A message displays indicating a temporary password has been sent to the user.

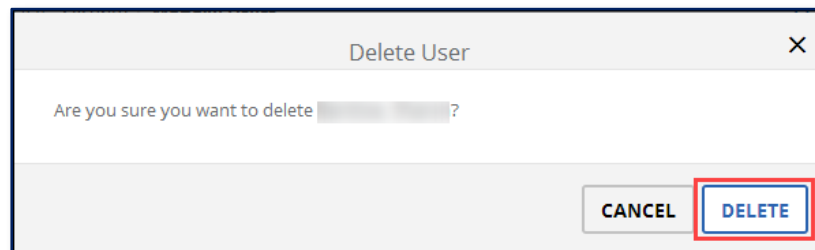


Deleting a User



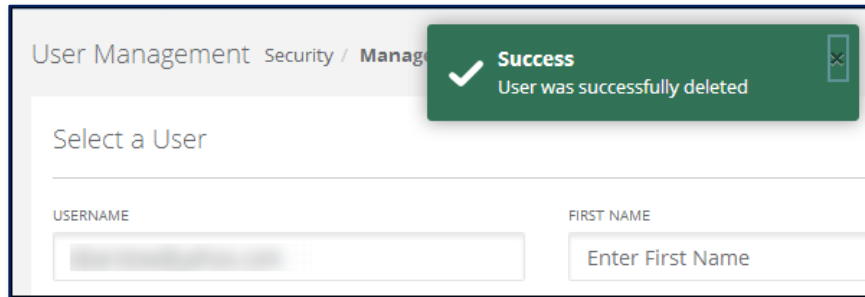
Follow along with the instructor to delete a user.

1. Perform a user search.
2. Click **Delete**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Delete User* confirmation box displays.



Remember that deleting does not remove the user from Sandata EVV, but inactivates the record.

3. Click **Delete**. A successful confirmation box displays.



Manage User Roles

The use of roles allows Administrators to tailor a set of system functions for each job title in the organization to make maintenance of user access easier. Whenever a role is edited, it affects **all** users who have been assigned to that role.

Sandata EVV includes a standard set of roles across all agencies. The roles are:

Default Role	Description
ASST_COOR (Assistant Coordinator)	Sandata EVV generalist that supports visit verification and visit reporting.
COORDINATOR	Intake/manage clients, intake/manage employees.
SECURITY_ADMIN	Agency set up, create and manage all EVV users.

Screen Overview































Manage User Roles

1 [CREATE USER ROLE](#)

3 Show: per page

Showing 11 to 20 of 23 entries

« < 1 2 3 > » 2

Role Name	Role Description	Actions
ASST_COOR	Assigned users can run SCHEDULING application	  
SECURITY_VIEW	Assigned users can run SECURITY application	 5  
SECURITY_ADMIN	Assigned users can run SECURITY application	4   6 
STAT_ADMIN	Assigned users can run STAT application	  
VM_UPDATE	Assigned users can run Visit Maintenance	  
VM_VIEW	Assigned users can run Visit Maintenance (view only)	  
SV_EMP_ADMIN_ROLE	Assigned users can start Employ Speaker Verification module	  
ACTUALS_ADMIN_ROLE	Assigned users can start Setup_Actuals module	  
FVV_ADMIN_ROLE	Assigned users can start Setup_FOB module	  
GPS_ADMIN_ROLE	Assigned users can start Setup_GPS_Phone module	  

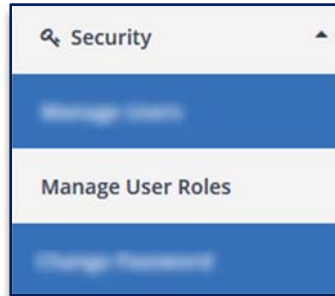
Showing 11 to 20 of 23 entries

« < 1 2 3 > » 2

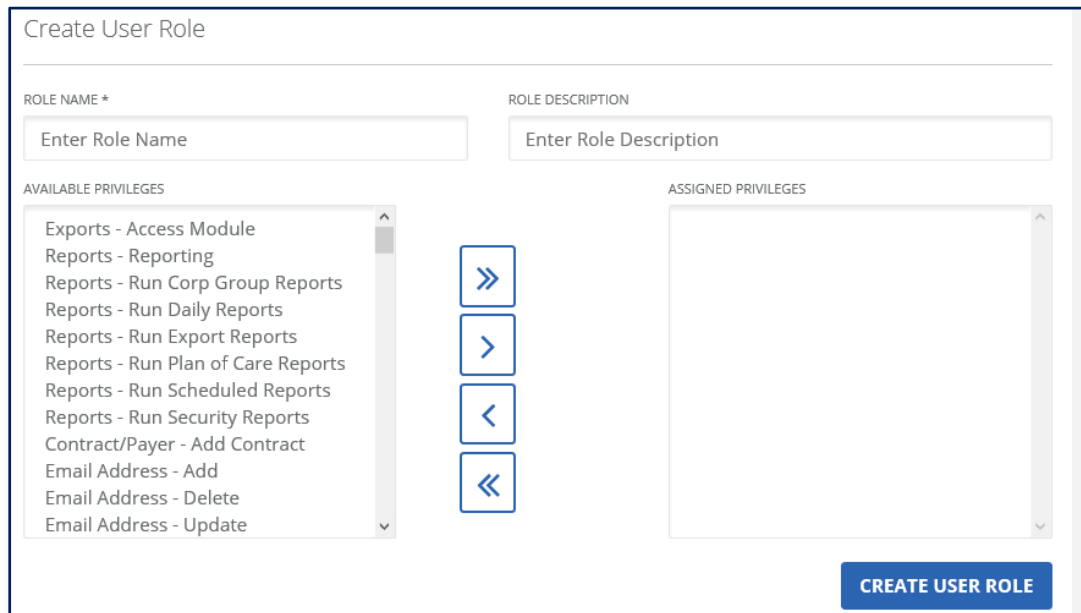
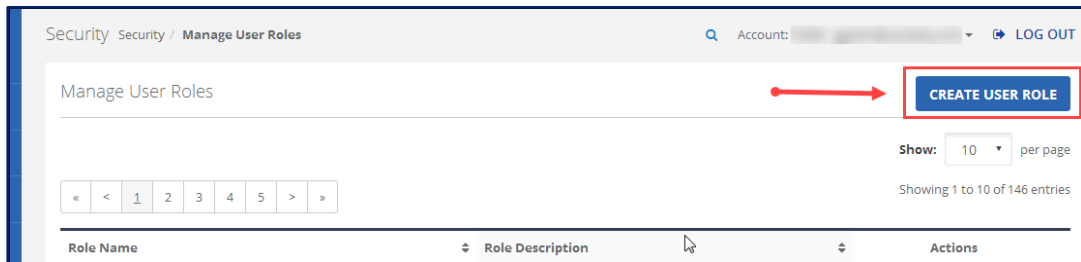
1. **Create User Role** – Used to create a new user role.
2. **Page Navigation** – Dependent upon the number of results, there can be 1 or multiple pages.
3. **Show** – Allows for input of how many entries are shown per page and displays the total number of results returned.
4. **Edit** – Edit a user.
5. **Delete icon** – Delete a user.
6. **Lock** – Allows the user to lock a role so that no other users can modify the user role.

Creating New User Role

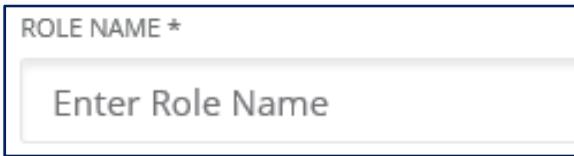
1. Click **Manage User Roles**. The *Manage User Roles* screen displays.



2. Click **CREATE USER ROLE**. The Create User Role screen opens.



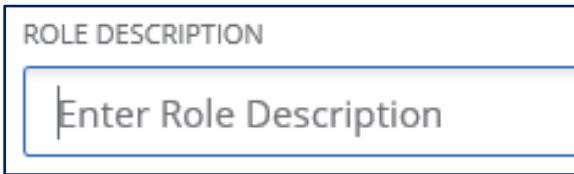
3. Enter a name for the new role in the **ROLE NAME*** field.



ROLE NAME *

Enter Role Name

4. Enter a brief description in the **ROLE DESCRIPTION** field.




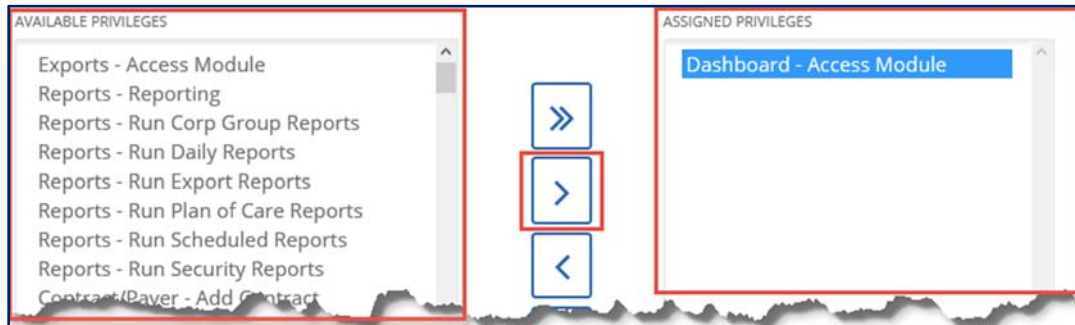
ROLE DESCRIPTION

Enter Role Description

5. Click **CREATE USER ROLE**. A successful confirmation message displays.



6. Click **Manage User Roles** from the *Navigation* panel.
7. Click **Edit**  on the newly created role.
8. Select the privilege(s) to be assigned to the new role in the **AVAILABLE PRIVILEGES** field.

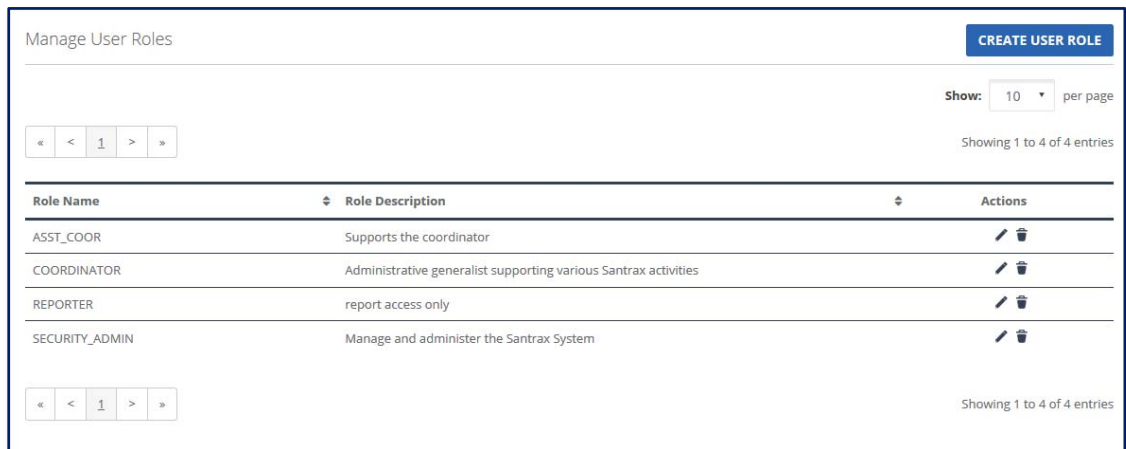



9. Click **MODIFY USER ROLE** to save the assigned privileges.

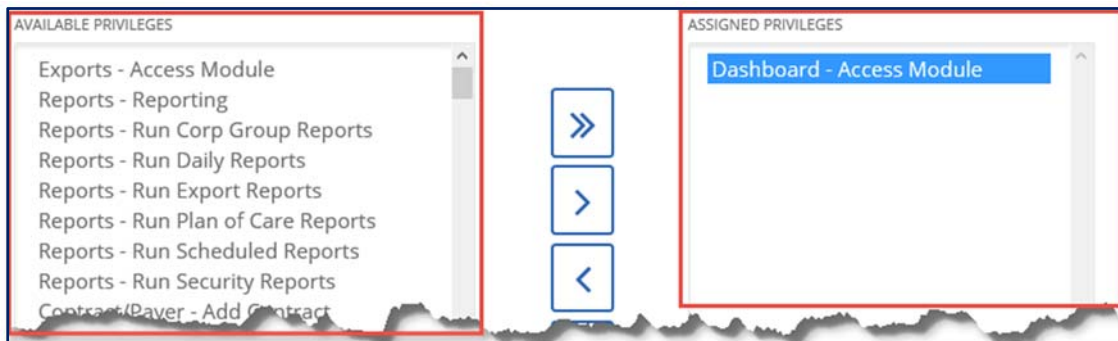
Modifying Roles

Making changes to a role impacts all users with that role assignment the next time they log in to the system.

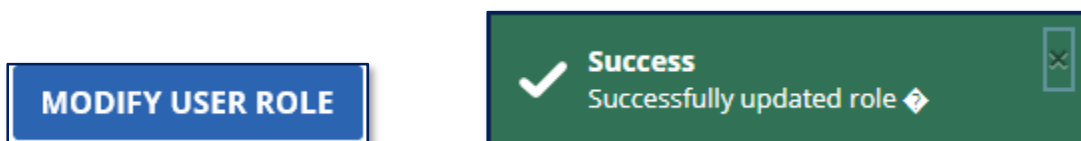
1. Scroll through the list of roles and find the role to be edited.



2. Click **Edit**  in the **Actions** column on the right-hand side of the screen of the role to be modified. The *Modify User Role* screen opens.
3. Add (**AVAILABLE PRIVILEGES**) or remove (**ASSIGNED PRIVILEGES**), as necessary.

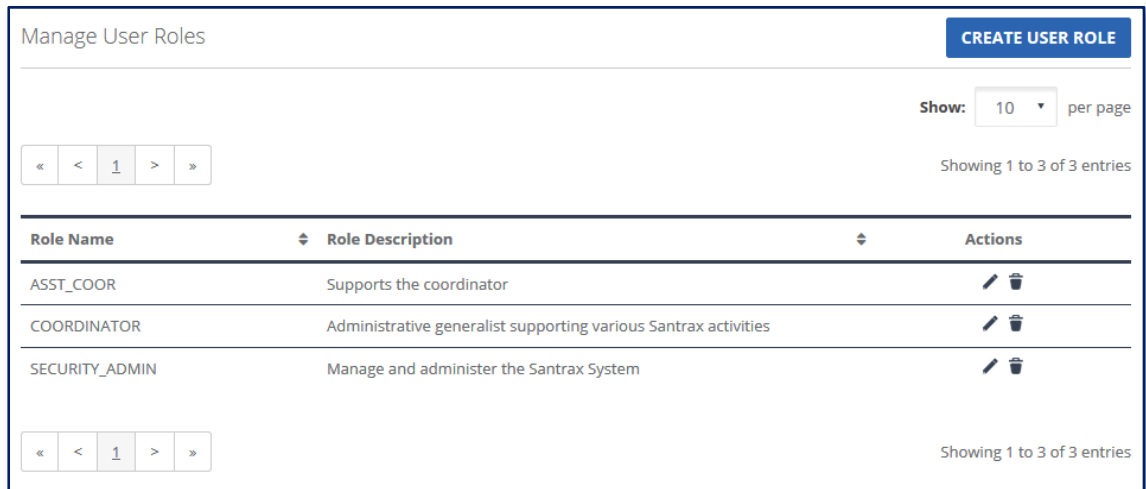


4. Click **MODIFY USER ROLE**. If successful, a confirmation message displays.



Deleting Roles







1. Scroll through the list of roles and find the role to be deleted.




Manage User Roles CREATE USER ROLE

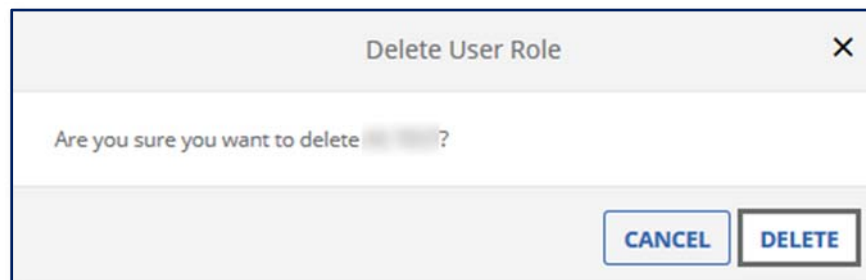
Show: 10 per page

Showing 1 to 3 of 3 entries

Role Name	Role Description	Actions
ASST_COOR	Supports the coordinator	 
COORDINATOR	Administrative generalist supporting various Santrax activities	 
SECURITY_ADMIN	Manage and administer the Santrax System	 

Showing 1 to 3 of 3 entries

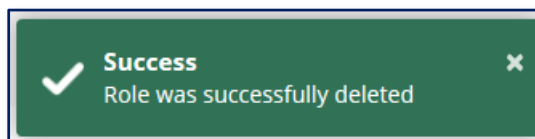
2. Click **DELETE**  in the **Actions** column on the right-hand side of the screen of the appropriate role. The *Delete User Role* confirmation box displays.




Delete User Role ✕

Are you sure you want to delete [role name]?

3. Click **DELETE**. A successful confirmation box displays.




Success ✕
 Role was successfully deleted

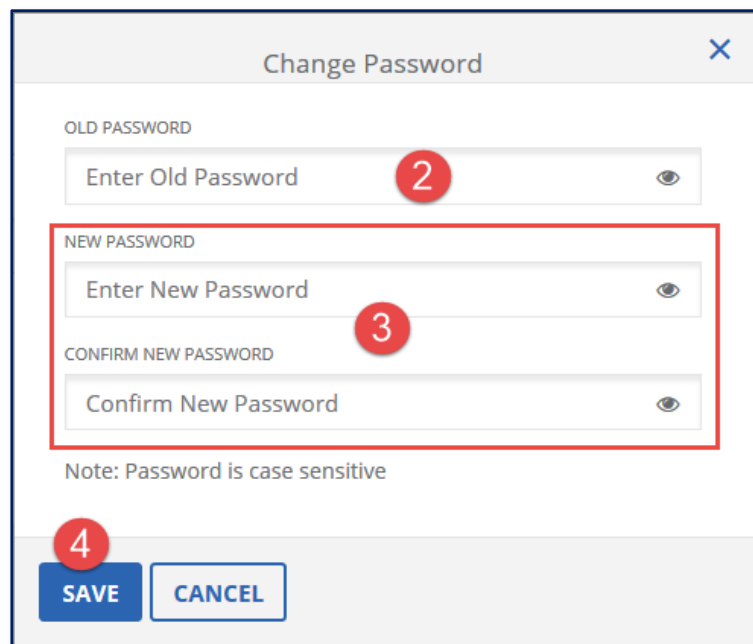
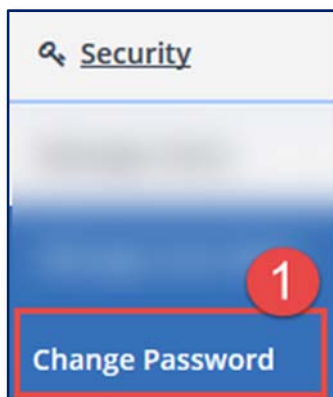
Change Password

Resetting Your Own Password

Change Password allows the logged in user to change his/her password.



To change another user's password, see the sub-section on this topic in the **Modifying a User** section of this document.



A screenshot of the 'Change Password' dialog box. It contains three password input fields: 'OLD PASSWORD', 'NEW PASSWORD', and 'CONFIRM NEW PASSWORD'. The 'NEW PASSWORD' field is highlighted with a red box and a red circle with the number '3' next to it. The 'OLD PASSWORD' field has a red circle with the number '2' next to it. At the bottom, there are 'SAVE' and 'CANCEL' buttons, with a red circle and the number '4' next to the 'SAVE' button. A note below the fields states: 'Note: Password is case sensitive'.

1. Click **Change Password** from the main **Security** menu. The *Change Password* panel opens.
2. Enter your current password in the **OLD PASSWORD** field.
3. Enter your new password in the **NEW PASSWORD** field; type it again in the **CONFIRM NEW PASSWORD** field.
4. Click **SAVE**.

4 Client Module

Module Time

45 minutes

This lesson introduces the process of how clients and employees are input and maintained in Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- Search for a client's record;
- Add a client record;
- Update a client record;
- Discharging/Reactivating a client record;

Key Terminology

Term/Acronym	Definition
Client	A person who receives services through the Medicaid program
Employee	A person who is employed by an agency provider to provide care to one or more clients

Introduction

The Clients module allows system users to maintain client records.



Take note that 'Clients' is what is seen in the EVV system. This can translate to Individual, Consumer or however the person/people for whom care is provided is termed for the program.

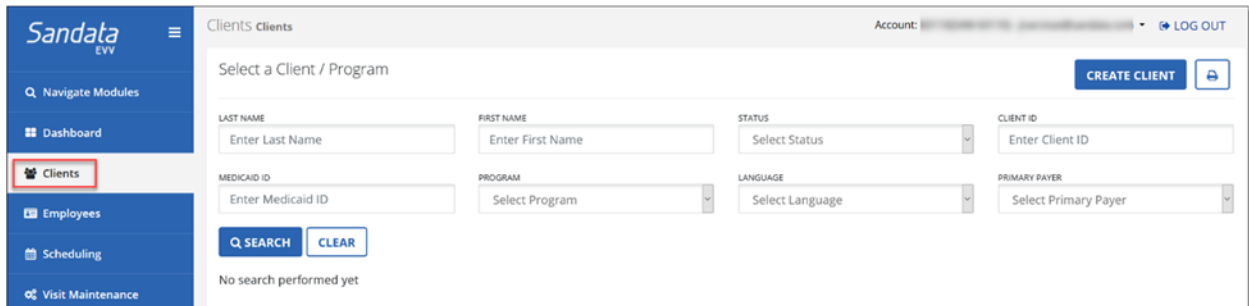
Accessing Clients

A system user with the appropriate permissions will see the **Clients** link listed in the Navigation panel on the left side of the screen. Clicking on the link will bring you to the Select a Client/Program screen.

Client Data

Search for a Client

Best practice is to perform a search to see if the client exists in the EVV system prior to creating/adding a new client.



Demonstration: How to search for a client

1. Click Clients from the Navigation panel. The search screen displays
2. Enter values either in the FIRST NAME, LAST NAME, or STATUS fields.
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.


Viewing a Client Record

Clients and authorization information will be received into Sandata EVV via an inbound data file from PA-DHS. Most client information will be view only but users will have the ability to add additional phone numbers and address information.



Demonstration: How to view a Client Record

1. Click the **EDIT** icon to the left of a client record. The client record screen opens.

Select a Client / Program As of: 10:06 AM [CREATE CLIENT](#) 

LAST NAME

FIRST NAME

STATUS

CLIENT ID

MEDICAID ID

PROGRAM




LANGUAGE

PRIMARY PAYER

[SEARCH](#) [CLEAR](#)

Show: 10 per page

Showing 1-1 of 1 entries

Name	Program	Status	Supervisor	Medicaid ID	As Of	SOC	EOC	Services
   <input type="text" value="Leslie Hopkins"/>	P1	● Active			6/19/19	6/19/19		1021Z

Showing 1-1 of 1 entries

2. The client record screen displays the *Personal* screen for review and data entry of other address information and other phone numbers to associated with the client. Navigate through the tabs to review the necessary information.

[GO BACK](#) Client: Leslie, Hopkins (670464) [HISTORY](#) [NOTES](#)

[Personal](#) *
 [Program](#) *
 [Diagnosis](#) *
 [Schedules](#)
[Recurring Schedule Templates](#)
[Invoices](#)

Personal


TITLE

FIRST NAME


MIDDLE INITIAL

LAST NAME

SUFFIX

SSN 

GENDER

BIRTH DATE 

PRIMARY SPOKEN LANGUAGE

Addresses (1)

(Current) [ADD NEW ADDRESS](#)

NAME

ADDRESS LINE 1

ADDRESS LINE 2

APT

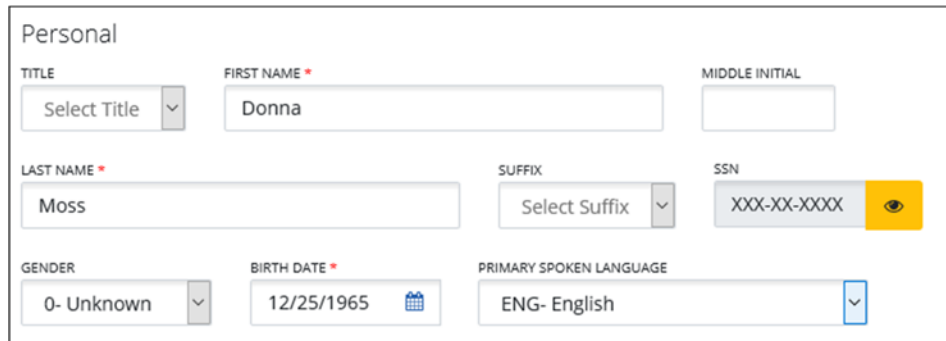
ZIPCODE

CITY

COUNTY

[Personal](#)

Personal



Personal

TITLE	FIRST NAME *	MIDDLE INITIAL
Select Title	Donna	
LAST NAME *	SUFFIX	SSN
Moss	Select Suffix	XXX-XX-XXXX
GENDER	BIRTH DATE *	PRIMARY SPOKEN LANGUAGE
0- Unknown	12/25/1965	ENG- English

Here is the information that can be found in the Personal section:

- **TITLE**
- **FIRST NAME***: First name will be entered from Member Feed
- **MIDDLE INITIAL**
- **LAST NAME***: Last name will be entered from Member Feed
- **SUFFIX**
- **SSN**
- **GENDER**
- **BIRTH DATE***: Birth Date will be entered from Member Feed
- **PRIMARY SPOKEN LANGUAGE**: Primary Language will be filled in from Member Feed



During the telephony call process, you will be prompted to enter a client ID to identify the client. This number can be found within the client record next to the client's name in parenthesis.

[← GO BACK](#) Client: Leslie, Hopkins (670464)

Address

Addresses (1)

555 Main St HO- Home (Current) ▼

ADD NEW ADDRESS

NAME	ADDRESS LINE 1 *		
	555 Main St		
ADDRESS LINE 2	APT	ZIPCODE *	
		11050-__	
CITY *	COUNTY *		
Port Washington	Nassau		
STATE *	ADDRESS TYPE *		
New York ▼	HO- Home ▼		

Here is the information that can be found in the Addresses section:

- **NAME** (Name for the address)
- **ADDRESS LINE 1***: Address Line 1 will be entered from Member Feed
- **ADDRESS LINE 2** (Optional)
- **APT** (Optional)
- **ZIP CODE***: Zip code will be entered from Member Feed
- **ADDRESS TYPE***: Address type will be entered from Member Feed

Phone Numbers, etc.

Phone Numbers, Etc

PHONE 1 *	PHONE 2	PHONE 3	PHONE 4
() _-__	() _-__	() _-__	() _-__
EMAIL			<input checked="" type="checkbox"/> ACTIVE

Here is the information that displays in the Phone Numbers section

- **PHONE 1**: Phone 1 will be entered from Member Feed
- **PHONE 2**: Enter any additional phone number associated with the client
- **PHONE 3**: Enter any additional phone number associated with the client
- **PHONE 4**: Enter any additional phone number associated with the client
- **EMAIL**: Personal email address
- **Active** (This checkbox will be checked if the address is Active)

Agency

Agency
OTHER ID
380214

- **OTHER ID:** Unique system assigned ID number.

Contacts

Contacts +				
Name	Home Phone	Mobile Phone	Work Phone	Actions

- Click the plus (+) sign to add a contact.
 - **FIRST NAME, LAST NAME, ADDRESS NAME, ADDRESS LINE 1, ZIP CODE, CITY, COUNTY and STATE** are required.
- Repeat the above step to add additional contacts for the client

Contact for client Alterations, Evelyn

Personal

TITLE ▼
Select Title

FIRST NAME *

MIDDLE INITIAL

LAST NAME *

SUFFIX ▼ GENDER ▼
Select Suffix Select Gender

BIRTH DATE

PRIMARY SPOKEN LANGUAGE ▼
Select Primary Spoken Language

Other Information

RELATION ▼
Select Relation

TYPE ▼
Select Type

Addresses (1) ADD NEW ADDRESS

NAME

ADDRESS LINE 1 *

ADDRESS LINE 2 APT

ZIPCODE * CITY *

COUNTY *

STATE * ▼
Select State

ADDRESS TYPE * ▼
Select Address Type


Phone Numbers, Etc

PHONE 1 PHONE 2

PHONE 3 PHONE 4

EMAIL

SAVE
CANCEL

 Program

Client Status

Client Status

STATUS *

EFFECTIVE DATE *

REASON FOR CHANGE

The Client Status section displays the following information:

- **STATUS:** New clients are *Pending* by default. Set status to *Active*.
- **EFFECTIVE DATE:** Effective date of the client
- **REASON FOR CHANGE**

Program Details

Program Details

PROGRAM *

SUPERVISOR

CREATED DATE *

SOC DATE

EOC DATE

- **PROGRAM*:** Program will be entered from Member Feed
- **SUPERVISOR:** Select from the drop-down. Used to group clients to supervising office staff.
- **CREATED DATE*:** Created Date will be entered from Member Feed
- **SOC DATE:** Start of Care date. This field is disabled if the client status is *Pending*.
- **EOC DATE:** End of Care date. This field is disabled if the client status is *Pending* or *Active*.

Services

Click the Service link to view Service information.

Services * +

Code	Description	Began	Ended
W1724	COMPANION 13	8/14/19	
W1793	PERSONAL ASSISTANCE SRVCS	8/14/19	

Service for client x

SERVICE *

W1724- Companion 13

BEGAN DATE *

08/14/2019

ENDED DATE

mm/dd/yyyy

DELETE
SAVE
CANCEL

- **SERVICE***: Service will be entered from Member Feed
- **BEGIN DATE***: Begin date of the service will be entered from Member Feed
- **END DATE**: End date of the service

Click **SAVE** to save the Service information.

Payers

This section indicates who is paying for the client visits. If there are multiple payers, the payers should be listed (ranked) in the order of responsibility.

1. Click the **MEDICAID ID** link to review the payer information.

Payers +		
Rank	Payer	Medicaid ID
1	PAODP	789456123

Payer Information for client: [REDACTED]

General

PAYER *
PAODP

RATE PLAN *
Default

RANK
1

SEND BILL TO
Select Send Bill To

PERCENT
100

Numbers, Etc.

CLIENT PAYER ID *
[REDACTED]

MEDICAID ID *
[REDACTED]

GROUP NO.
[REDACTED]

REFERRAL NO.
[REDACTED]

BEGINS DATE
mm/dd/yyyy

ENDS DATE
mm/dd/yyyy

Options

CAPPED RATES TRANSITION TO NEXT PAYER

SUPPRESS IN ELECTRONIC FILE

RESPONSIBLE FOR COPAY

REQUIRES PRE-DENIAL

MSP TYPE
Select MSP Type

Authorizations

Authorizations +

Hide Outdated Auths Hide Voided Auths

Service	Ref No	Format	Max	Begin	End
W1724- Companion 13	[REDACTED]	Hours	0.00	8/1/19	9/30/19

DELETE
SAVE
CLOSE

- **PAYER***: Payer name will be entered from Member Feed
- **RATE PLAN***: Rate Plan will be entered from Member Feed
- **RANK**: Rank will automatically be set in the order that the client payers are entered. The first payer added is rank 1 and the second payer added is rank 2.
- **SEND BILL TO**: Contact that will receive billing invoices for services for this payer. For example, invoices can be sent to the address of client’s Guarantor contact.
- **PERCENT**: If there is cost share between two payers, it can be split by percentage.
- **MEDICAID ID***: Unique ID number assigned to the client by Medicaid. Entered from Member Feed.
- **GROUP NO.**: Identification number used for invoicing. Entered from Member Feed.
- **REFERRAL NO.**: Identification number used for invoicing. Entered from Member Feed.
- **BEGIN DATE**: Begin date of payer coverage. Entered from Member Feed.
- **END DATE**: End date of payer coverage. Entered from Member Feed.
- **Capped Rates Transition to Next Payer**: This checkbox may be checked to ensure if bill hours extend past the rate’s Cap amount, to transition any other rates to the Rank 2 payer.
- **Suppress in Electronic File**

- **Responsible for Copay**
- **Requires Pre-Denial**
- **MSP TYPE:** MSP (Medicare Secondary Payer) Code

2. Click **SAVE** to save the Payer information.

Authorizations

1. Click the Authorization link to view authorization details

Service	Ref No	Begin	End	Source
W1724- Companion 13	A7845121	8/1/19	9/30/19	PAODP

Authorization Details x


<p>General Info</p> <p>SERVICE * W1724- Companion 13</p> <p>EVENT CODE * DEF- Default</p> <p>REF. NO. * A7845121</p> <p>FORMAT * Hours</p> <p><input type="checkbox"/> VOIDED?</p> <p>MAXIMUM 0 0 = Unlimited Used: 15.00 Missed: 0</p> <p>Date Range</p> <p>BEGIN DATE * 08/01/2019 <input type="text"/></p> <p>END DATE * 09/30/2019 <input type="text"/></p> <p>AUTHORIZATION COMMENTS <input style="width: 100%; height: 40px;" type="text"/></p> <p>Limitations</p> <p>LIMIT BY None</p>	<p>Modifiers</p> <p>1 <input type="text"/></p> <p>2 <input type="text"/></p> <p>3 <input type="text"/></p> <p>4 <input type="text"/></p>
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2. The Authorization Details screen shows the following information:

- **SERVICE***: Service will be selected from Member Feed
- **EVENT CODE***: Event Code will be selected from Member Feed

- **FORMAT***: Format will be selected from Member Feed
- **VOIDED?**: This checkbox will be checked if the authorization has been voided.
- **MAXIMUM**: Maximum amount of units, hours, visits that the auth can be used for. 0 = Unlimited.
- **BEGIN DATE***: Begin date will be entered from Member Feed
- **END DATE***: Begin date will be entered from Member Feed
- **AUTHORIZATION COMMENTS**: Enter any applicable comments for the authorization here.
- **LIMIT BY**: Entered by Member Feed
 - None: no limitations on service.
 - Day: this option indicates that service can only be provided on selected days of the week.
 - Week: this option indicates that service can be only be provided within a specific number of weeks.

3. Click **SAVE** when done.

 **Diagnosis**

Diagnosis
+

No diagnosis

Click the (+) sign to add a Diagnosis.

Diagnosis
x

CODE *

SEARCH
 ADMITTING DIAGNOSES

DESCRIPTION

ONSET DATE *

EXACERBATION

RANK *

SEVERITY

VERSION *

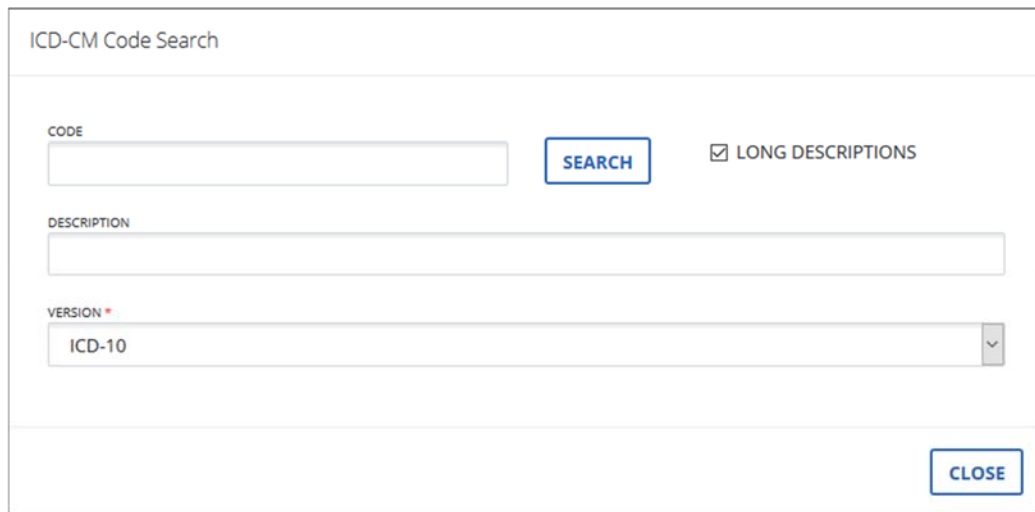
[Go to ICD10Data.com](#)

SAVE
CLOSE

1. Enter the necessary information
 - **CODE**: Enter or search for the diagnosis code
 - **DESCRIPTION**: Shows the description of the diagnosis

- **ONSET DATE:** Enter the date when the condition was diagnosed. If the diagnosis is an exacerbation of the condition, click the Exacerbation check box.
- **RANK:** This field will indicate the level or status of the diagnosis.
- **SEVERITY:** Enter the severity of the diagnosis.
- **VERSION:** Indicates the ICD version used.

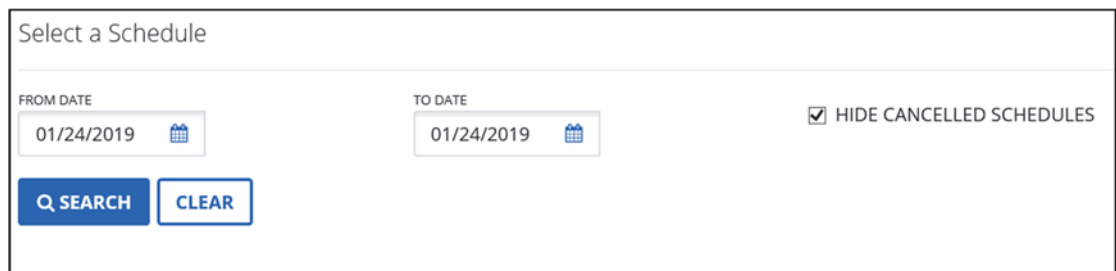
2. To search for an ICD Code, click the **SEARCH** button.



The form is titled "ICD-CM Code Search". It contains the following fields and controls:

- CODE:** A text input field.
- SEARCH:** A blue button.
- LONG DESCRIPTIONS**
- DESCRIPTION:** A text input field.
- VERSION *:** A dropdown menu with "ICD-10" selected.
- CLOSE:** A blue button in the bottom right corner.

[Schedules](#)



The form is titled "Select a Schedule". It contains the following fields and controls:

- FROM DATE:** A date input field with "01/24/2019" and a calendar icon.
- TO DATE:** A date input field with "01/24/2019" and a calendar icon.
- HIDE CANCELLED SCHEDULES**
- SEARCH:** A blue button with a magnifying glass icon.
- CLEAR:** A blue button.

Viewing Client Schedules

1. To view a client’s schedule, specify the dates of service (From Date, To Date).
2. Uncheck the Hide Cancelled Schedules check box, if applicable. This will include cancelled schedules in your results.
3. Click **SEARCH**.
4. The schedules matching the search criteria entered will appear in the Results area.

Select a Schedule

FROM DATE: 01/24/2019

TO DATE: 01/24/2019

HIDE CANCELLED SCHEDULES

Show: 10 per page
 Showing 1-1 of 1 entries

Actions	Schedule Date	Program	Employee	Employee Supervisor	Service	Event Code	Sch In	Sch Out	Hrs In	Out	Hrs	Schedule Status	Comments
	1/24/19	P1	Testy, Firsty		1021Z	DEF	12:00 PM	04:00 PM	4.00		4.00	01-Pending	

Recurring Schedule Templates

Schedule Templates

A recurring schedule template is a template that will be copied over from week to week. It is particularly useful given that it allows you to schedule staff members to a particular case according to the authorizations received.

Schedule Templates

Generated through: Never generated

GENERATE THROUGH DATE: 02/09/2019

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1							


[Invoices](#)

Invoices 

Show: 10 per page
Showing 1-4 of 4 entries

Invoice Date	Program	Medicaid ID	Invoice No	Items	Amount	Balance	Status	Comments
 1/8/19	P1	256642	2	2	\$0.00	\$0.00	07- Bill Paid	
 1/8/19	P1	256642	4	1	\$80.00	\$80.00	06- Bill Sent	
 1/11/19	P1	256642	8	1	\$40.00	\$40.00	06- Bill Sent	
 3/26/19	P1	256642	15	1	\$50.00	\$50.00	06- Bill Sent	

Showing 1-4 of 4 entries

Sent and Paid invoices for the client can be found here. To edit an Invoice, click the  icon.

[←GO BACK](#) Edit Billing Invoice

Client Info



CLIENT | PROGRAM (MEDICAID ID)
 Thawne, Edward | P1 (256642)


PAYER
 Payer P

RATE PLAN

Dates and Status

Dates of Service

FROM DATE: 01/01/2019  TO DATE: 01/08/2019 

INVOICED ON DATE: 01/08/2019 

STATUS
 07- Bill Paid

ORIG AMOUNT
 \$0.00

Reference Codes

ALTH# 999999 REF#

PROVIDER# BILL CODE 121 CS CODE 30

Mark Invoice As

ADJUSTMENT DEFAULT CODE
 Select Default Code

LATE CHARGES

VOID RESUBMITTED

[Payments & Credits](#) [Line Items](#) [Supplemental Codes](#) [Exports](#) [Admission Payer History](#)




No Payments and Credits found



Enter additional phone numbers if the individual has more than one phone line (home, mobile or phone at additional address) with which the employee can clock-in and clock-out from.



Exercise: Viewing a Client Record

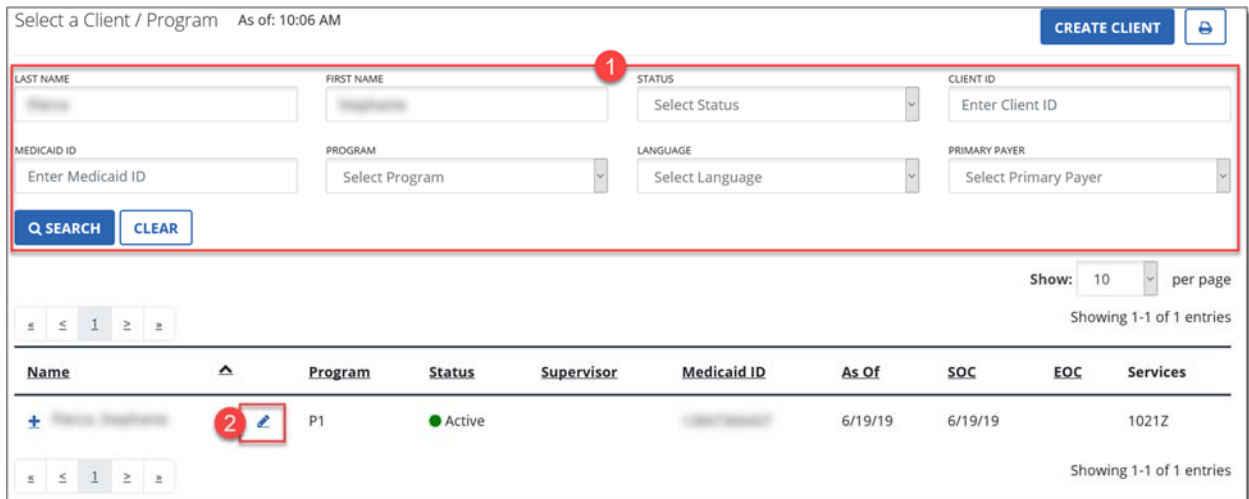
Task	Description
1.	Use the filters on the <i>Search a Client</i> screen to locate the clients you want to view.
2.	Click  .
3.	In the search results, click the  icon to the left of the client's record.
4.	Review the information within the client record and navigate to the different tabs
5.	Click  .


Modifying Client Data

Modifying a client’s data will allow you to update their information as necessary.

Any updates made for the client will be effective from the time the change was made. The information previously available will continue to be in effect for all calls and visits prior to the change. In other words, changes are not retroactive.

1. Search for the Client
2. Click the **EDIT** icon





































Select a Client / Program As of: 10:06 AM CREATE CLIENT 

LAST NAME: FIRST NAME: STATUS: Select Status CLIENT ID: Enter Client ID

MEDICAID ID: Enter Medicaid ID PROGRAM: Select Program LANGUAGE: Select Language PRIMARY PAYER: Select Primary Payer

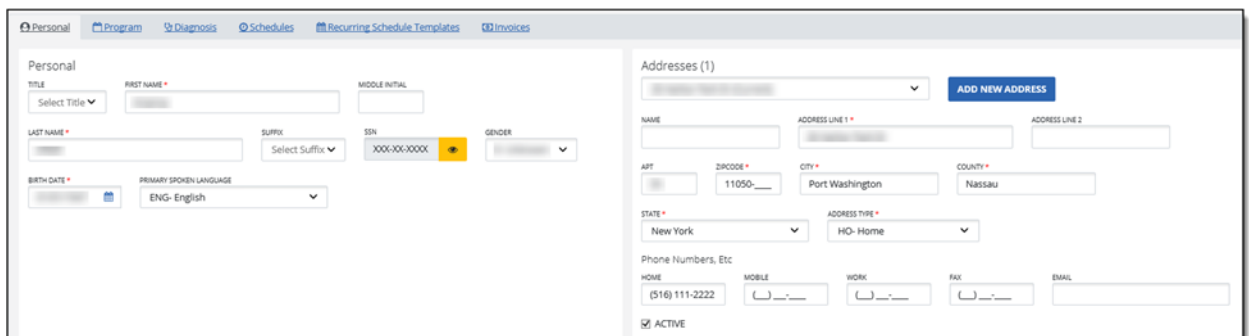
Show: 10 per page

Showing 1-1 of 1 entries

Name	Program	Status	Supervisor	Medicaid ID	As Of	SOC	EOC	Services
                                 	P1	Active			6/19/19	6/19/19		1021Z

Showing 1-1 of 1 entries

3. Make all necessary updates to the address and phone number information.



Personal

TITLE: Select Title FIRST NAME: MIDDLE INITIAL:

LAST NAME: SUFFIX: Select Suffix SSN: XXX-XX-XXXX GENDER:

BIRTH DATE: PRIMARY SPOKEN LANGUAGE: ENG-English

Addresses (1)

NAME: ADDRESS LINE 1: ADDRESS LINE 2:

APT: ZIPCODE: 11050 CITY: Port Washington COUNTY: Nassau

STATE: New York ADDRESS TYPE: HO-Home

Phone Numbers, Etc

HOME: (516) 111-2222 MOBILE: WORK: FAX: EMAIL:

ACTIVE

4. SAVE & CLOSE



Deactivating Clients

Use the Inactive status when provider services are no longer required. Deactivating a client really does not delete them from the system but rather prevents the client from being scheduled for services going forward. Any information already captured will continue to reference the client's information. However, any new activity will not use any clients that were discharged. In other words, discharge is not retroactive.



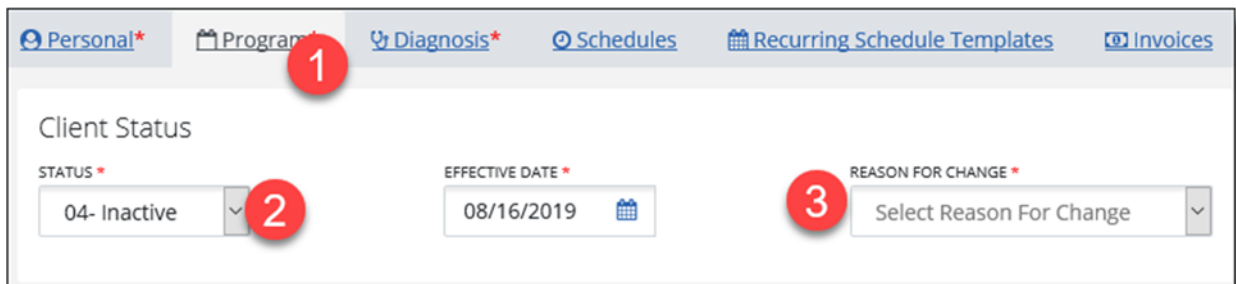
Demonstration: How to deactivate a client

1. Click the Program tab in the client record
2. In the STATUS menu, change the status to 04- Inactive



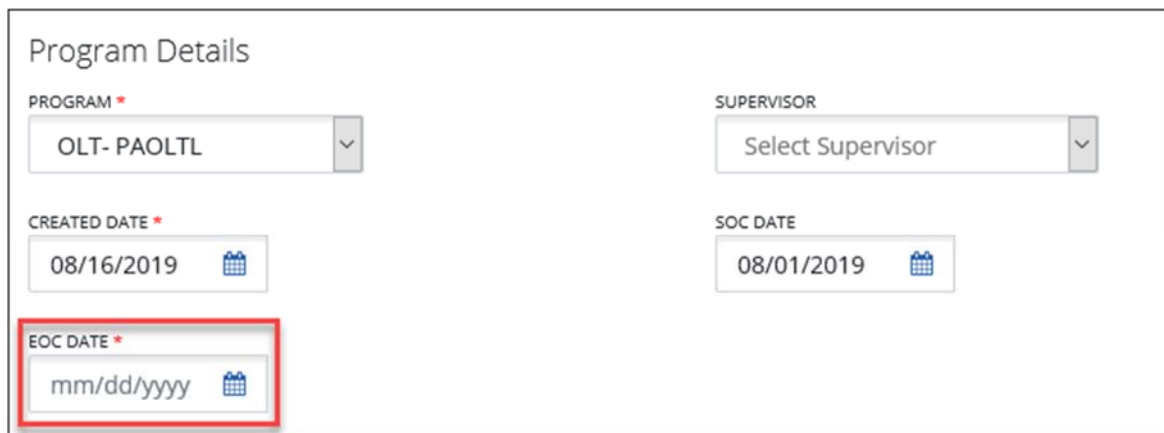
Note that the effective date will default in automatically when you make a status change.

3. From the Reason for Change menu, select a Reason for Change.



The screenshot shows the 'Client Status' form. At the top, there are navigation tabs: Personal*, Program*, Diagnosis*, Schedules, Recurring Schedule Templates, and Invoices. A red circle with the number '1' is placed over the 'Program*' tab. Below the tabs, the form has three main sections: 'STATUS *' with a dropdown menu showing '04- Inactive' and a red circle with '2' next to it; 'EFFECTIVE DATE *' with a date field showing '08/16/2019' and a calendar icon; and 'REASON FOR CHANGE *' with a dropdown menu showing 'Select Reason For Change' and a red circle with '3' next to it.

4. Enter the EOC (End of Care) Date.



The screenshot shows the 'Program Details' form. It contains several fields: 'PROGRAM *' with a dropdown menu showing 'OLT- PAOLTL'; 'SUPERVISOR' with a dropdown menu showing 'Select Supervisor'; 'CREATED DATE *' with a date field showing '08/16/2019' and a calendar icon; and 'SOC DATE' with a date field showing '08/01/2019' and a calendar icon. At the bottom, the 'EOC DATE *' field is highlighted with a red box, showing a date field with the placeholder 'mm/dd/yyyy' and a calendar icon.



Note that when clicking into the EOC DATE field, a pop up will display confirming that you want to change the EOC date.

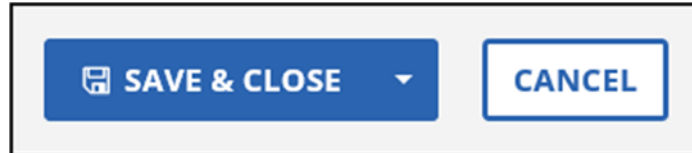


Change Date

Are you sure that you want to change date?

YES NO

5. SAVE & CLOSE.



SAVE & CLOSE CANCEL


Reactivating Clients

A client can also be reactivated. Search for the status of Inactive and click the Edit button to the left of the client’s program and status.




Demonstration: How to Reactivate a Client

1. Search for the status of 04- Inactive

Select a Client / Program As of: 7:26 PM CREATE CLIENT 

LAST NAME Enter Last Name	FIRST NAME Enter First Name	STATUS 04- Inactive	CLIENT ID Enter Client ID
MEDICAID ID Enter Medicaid ID	PROGRAM Select Program	LANGUAGE Select Language	PRIMARY PAYER Select Primary Payer

2. Click the **Edit** icon to the left of the client’s program and status

	Name	Program	Status
	+ Pierce, Sebastian	ODP	● Inactive

« ≤ 1 ≥ »

3. Click the Program tab and change status from 04- Inactive to 02- Active

Personal | Program | Diagnosis | Schedules | Recurring Schedule Te

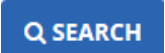


Client Status

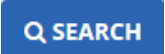


STATUS * 02- Active	EFFECTIVE DATE * 01/22/2019	REASON FOR CHANGE Select Reason For Cl
------------------------	--------------------------------	---

4. SAVE & CLOSE



Exercise: Deactivating/Reactivate a Client

Deactivating A Client	
Task	Description
1.	Use the filters on the <i>Search a Client</i> screen to locate the clients you just created.
2.	Click  .
3.	In the search results, click the  icon to the left of your client's record.
4.	Click the <i>Program</i> tab and change the STATUS* field to 04- Inactive.
5.	From the Reason for Change menu, select a Reason for Change.
6.	Enter the EOC (End of Care)* Date .
7.	Click  .

Reactivating a client	
Task	Description
1.	Use the STATUS filter to search for the client you just deactivated by setting the status to 04- Inactive.
2.	Click  .
3.	In the search results, click the  icon to the left of your client record.
4.	Click the <i>Program</i> tab and change the STATUS* field from 04- Inactive to 02- Active.
5.	Click  .

5 Employee Module

Module Time

30 minutes

This lesson introduces the process of how employees are input and maintained in Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- Search for an employee record;
- Add an employee record;
- Update an employee record;
- Terminate/Reactivate an employee record

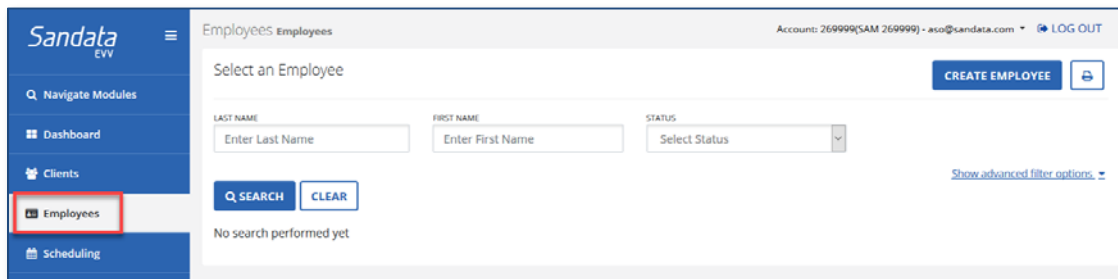
Employee Data

The Employee module allows system users to maintain employee records.



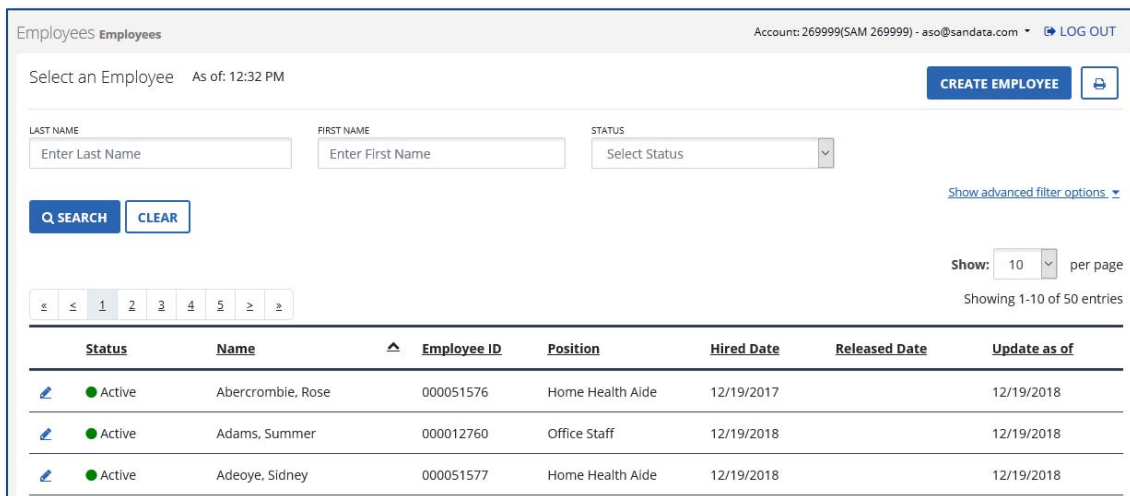
Take note that 'Employee' is the term used in the EVV system. This can translate to however the person/people for whom is providing care is termed for the program.

Search for an Employee




Demonstration: Search for an Employee

1. Click **Employees** from the **Navigation** panel. The Search screen displays.
2. Enter the values either in **LAST NAME**, **FIRST NAME** or **STATUS** field.
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



Status	Name	Employee ID	Position	Hired Date	Released Date	Update as of
Active	Abercrombie, Rose	000051576	Home Health Aide	12/19/2017		12/19/2018
Active	Adams, Summer	000012760	Office Staff	12/19/2018		12/19/2018
Active	Adeoye, Sidney	000051577	Home Health Aide	12/19/2018		12/19/2018

Create New Employee(s)

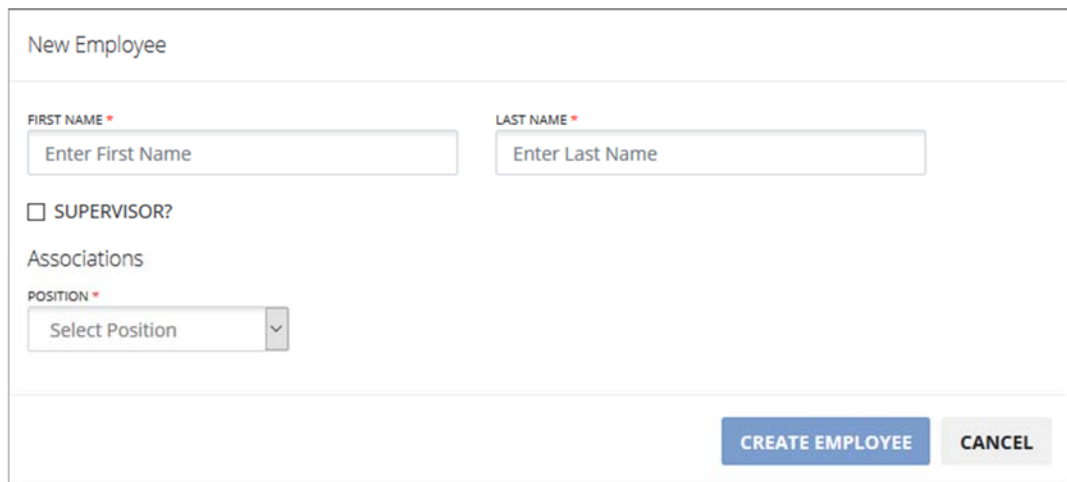
To create a new employee, at a minimum, the last name, first name and position are required to start. Required fields are indicated with an asterisk (*), to the right of the field.



Demonstration: How to Create a New Employee

The employee record is made up of the following sections.

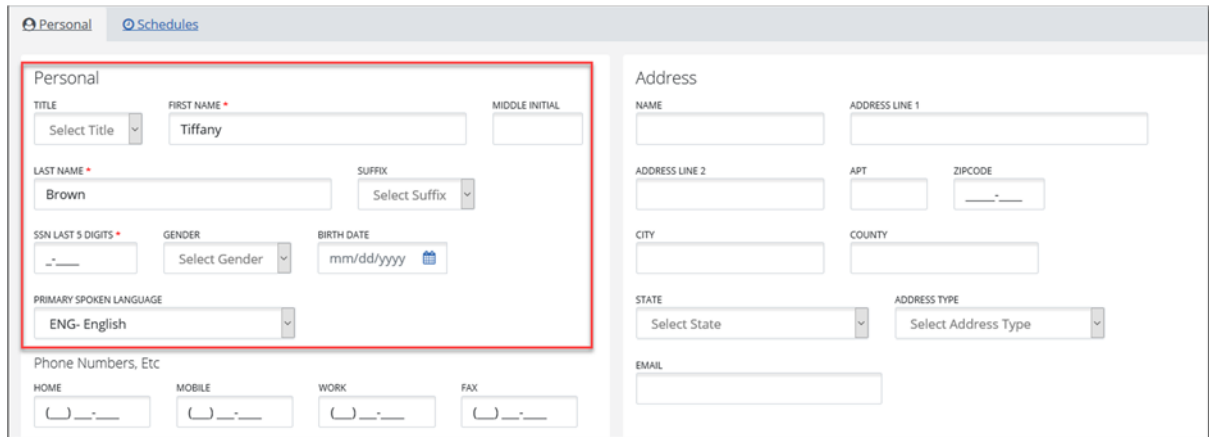
1. Click **Employees>CREATE EMPLOYEE**
2. Enter the employee **FIRST NAME**, **LAST NAME**, and **POSITION**.
3. Click **CREATE EMPLOYEE**.



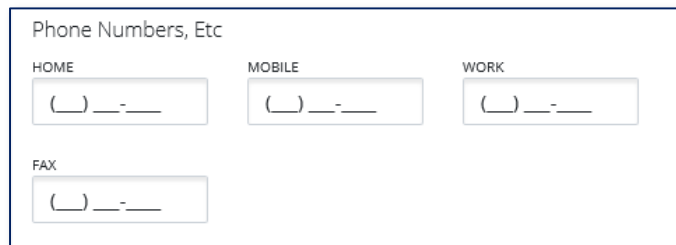
The screenshot shows a web form titled "New Employee". It contains the following fields and controls:

- FIRST NAME ***: A text input field with the placeholder "Enter First Name".
- LAST NAME ***: A text input field with the placeholder "Enter Last Name".
- SUPERVISOR?**: A checkbox.
- Associations**: A section header.
- POSITION ***: A dropdown menu with the placeholder "Select Position".
- CREATE EMPLOYEE**: A blue button.
- CANCEL**: A grey button.

4. **Personal**
 - Enter the last 5 digits of the employee Social Security Number.

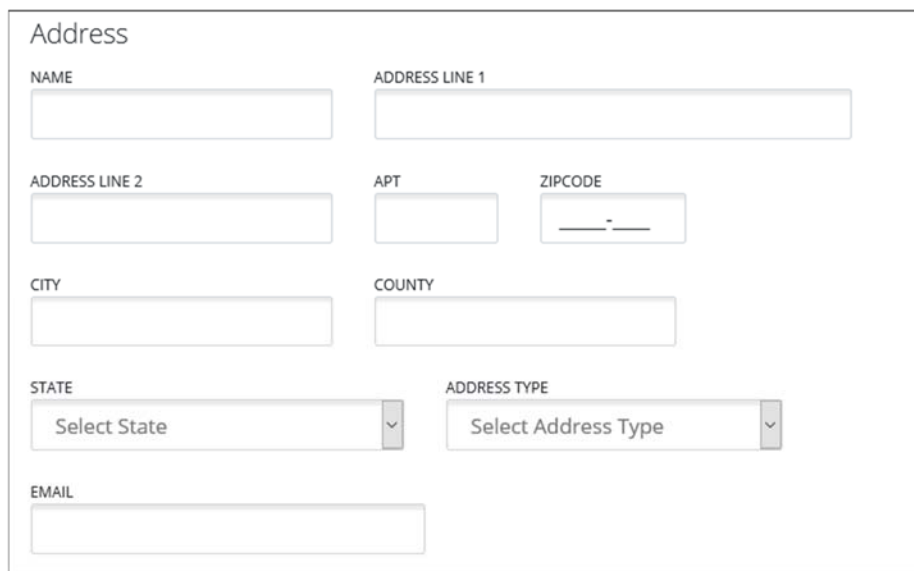


5. Phone Numbers, etc. (Optional)



6. Address

Enter the Address and choose the appropriate Address Type (Optional).



7. Contacts (Optional)

- a. Click the (+) sign the Contacts section

Contacts				
Name	Phone 1	Phone 2	Phone 3	Actions
+				

- b. Fill in the necessary information for the employee contact. Required fields include: **FIRST NAME, LAST NAME, ADDRESS LINE 1, ADDRESS TYPE** and **ZIP CODE** (entering a valid zip code automatically populates the City, County and State).
- c. Click the **ADD NEW ADDRESS** button to add additional address for the contact.
- d. Click **SAVE** to employee contact

Contact for employee Adams, Summer

Personal

TITLE
Select Title

FIRST NAME *

MIDDLE INITIAL

LAST NAME *

SUFFIX GENDER
Select Suffix Select Gender

BIRTH DATE
mm/dd/yyyy

PRIMARY SPOKEN LANGUAGE
ENG- English

Other Information

RELATION
Select Relation

TYPE
GEN- General

Addresses (1)

Home: HO- Home (**ADD NEW ADDRESS**

NAME
Home

ADDRESS LINE 1 *

ADDRESS LINE 2 APT

ZIPCODE * CITY *

COUNTY *
Nassau

STATE *
New York

ADDRESS TYPE *
HO- Home

Phone Numbers, Etc

PHONE 1 PHONE 2
() - -

PHONE 3 PHONE 4
() - -

EMAIL

SAVE **CANCEL**

8. Agency

Fill in the necessary agency information. Required fields include: **STATUS**, **POSITION**, and **EMPLOYEE ID** (System generated).

Agency

STATUS * <input type="text" value="01- Recruit"/>	EFFECTIVE DATE <input type="text" value="02/10/2019"/>	<input type="checkbox"/> IS REHIRE	POSITION * <input type="text" value="OFC- Office Staff"/>
<input type="checkbox"/> SUPERVISOR?		EMPLOYEE ID * <input type="text"/>	
HIRE DATE <input type="text" value="mm/dd/yyyy"/>		SUPERVISOR <input type="text" value="Select Supervisor"/>	
<input type="checkbox"/> MOBILE USER			



During the telephony call process, you will be prompted to enter a Santrax ID to identify the employee. The EMPLOYEE ID is the number that needs to be entered.



The MOBILE USER checkbox must be checked in order for the system to create a temporary password for employees to use the mobile app to call-in/call-out.

[Schedules](#)

Select a Schedule

FROM DATE <input type="text" value="05/14/2019"/>	TO DATE <input type="text" value="05/14/2019"/>	<input checked="" type="checkbox"/> HIDE CANCELLED SCHEDULES
<input type="button" value="SEARCH"/> <input type="button" value="CLEAR"/>		
No search performed yet		

Viewing Employee Schedules

1. To view an employee’s schedule, specify the dates of service (**From Date, To Date**).
2. Uncheck the Hide Cancelled Schedules checkbox, if applicable. This will include cancelled schedules in your results.
3. Click **SEARCH**.
4. The schedules matching the search criteria entered will appear in the Results area.

Schedule Date	Client	Program	Employee Supervisor	Service	EC	Sch In	Sch Out	HrsP	INP	OUTP	Hrs	Supplies	Schedule Status	PRN	Comments
5/14/19		P1		1214Z	DEF	01:00 PM	02:00 PM	1.00			1.00		01-Pending		

9. **SAVE & CLOSE / Cancel**



Follow Me: How to Create a New Employee

1. Click **CREATE NEW EMPLOYEE**. The **Create Employee** screen opens.
2. In the Personal section, enter **FIRST NAME**, **LAST NAME**, and **SOCIAL SECURITY #**
3. Enter employee’s phone numbers (optional)

Personal

TITLE: Select Title (dropdown)

FIRST NAME: Tim (1)

MIDDLE INITIAL: (empty)

LAST NAME: Caldwell (2)

SUFFIX: Select Suffix (dropdown)

SSN LAST 5 DIGITS: 9-8975 (3)

GENDER: 1- Male (dropdown)

BIRTH DATE: 01/01/1945 (calendar icon)

PRIMARY SPOKEN LANGUAGE: ENG- English (dropdown)

Phone Numbers, Etc

HOME: ()-()-()-()

MOBILE: ()-()-()-()

WORK: ()-()-()-()

FAX: ()-()-()-()

4. Enter the required values for the address and choose the appropriate Address Type.

Address

NAME: (empty)

ADDRESS LINE 1: (empty)

ADDRESS LINE 2: (empty)

APT: (empty)

ZIPCODE: ()-()-()

CITY: (empty)

COUNTY: (empty)

STATE: New York (dropdown)

ADDRESS TYPE: Select Address Type (dropdown)

EMAIL: (empty)

5. In the Agency section, enter **STATUS, POSITION, EMPLOYEE ID, HIRE DATE, and EFFECTIVE DATE.**
6. Check the **MOBILE USER** box.

Agency

STATUS: 01- Recruit (dropdown)

EFFECTIVE DATE: 06/10/2019 (calendar icon) (5)

IS REHIRE:

POSITION: HMK- Homemaker (dropdown)

SUPERVISOR?:

EMPLOYEE ID: 527186705

HIRE DATE: mm/dd/yyyy (calendar icon)

SUPERVISOR: Select Supervisor (dropdown)

MOBILE USER: (6)

7. Click **SAVE & CLOSE**. The **Save Confirmation** dialog box displays.



Your changes have been saved successfully.

OK

8. Click **OK**. The employee is added to the system.



Exercise: Create a New Employee

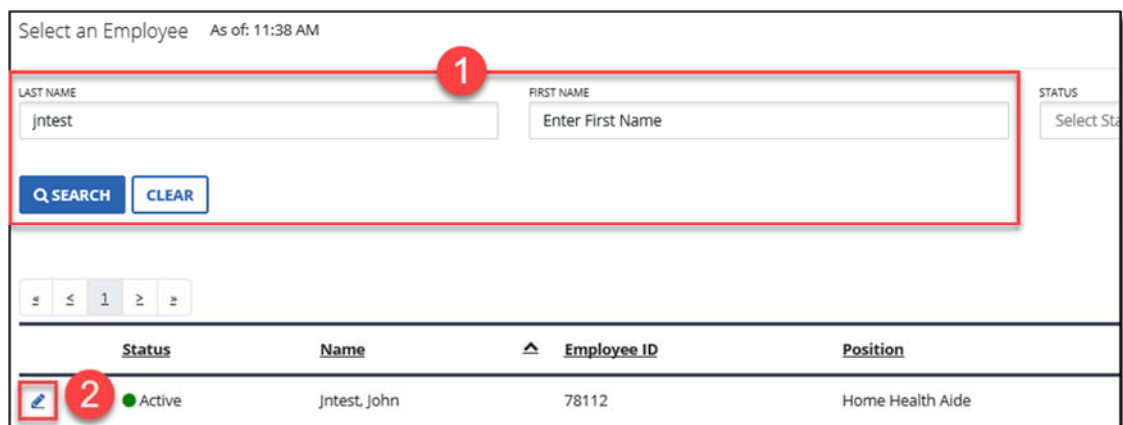
Creating A New Employee	
Task	Description
1.	Click the <i>Employee Module</i> on the navigation panel.
2.	Click the  button in the upper-right corner of the screen.
3.	Enter a First Name, Last Name, and Position into the appropriate FIRST NAME* , LAST NAME* , and POSITION* fields. Click CREATE EMPLOYEE .
4.	Enter the last 5 digits of the social security number into the SSN LAST 5 DIGITS* field (do not use a real Social Security number).
5.	Enter and confirm an email address (use the @mailinator email extension for the email address).
6.	Change the STATUS* field from 01- Recruit to 02- Active.
7.	Check the <input checked="" type="checkbox"/> MOBILE USER checkbox in the <i>Agency</i> section of the screen <i>Note:</i> If the box is not checked, a temporary password is not created for the employee to log in to the Sandata Mobile Connect app. If the box is checked, an email address must be entered in order for Sandata EVV to send the temporary password.
8.	Click  .
9.	Go back to the <i>Select an Employee</i> screen and use the filters to search for the employee you just created.

Modifying Employee Data

Modifying an employee's data will allow you to update all their information, as necessary.

Any updates made for the employee will be effective from the time the change was made. The information previously available will continue to be in effect for all calls and visits prior to the change. In other words, changes are not retroactive.


1. Search for the employee
2. Click the **EDIT** icon



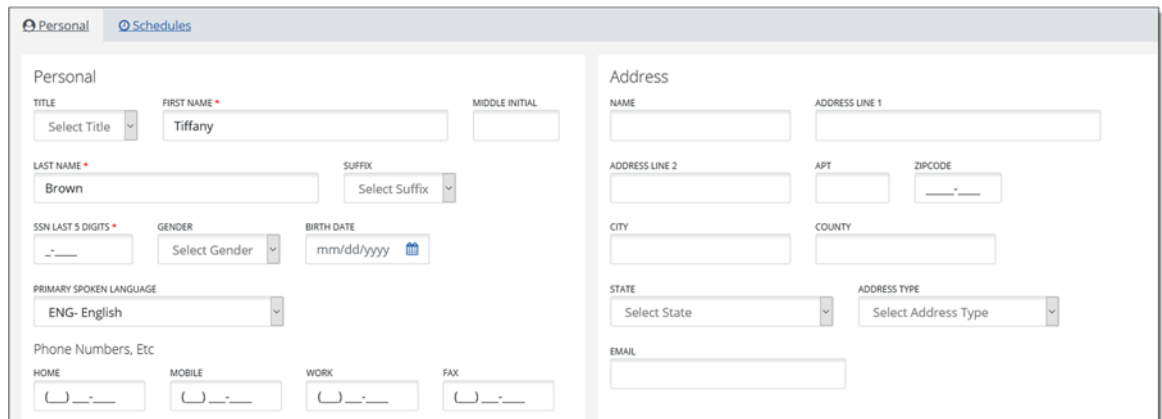
Select an Employee As of: 11:38 AM

LAST NAME: jntest FIRST NAME: Enter First Name STATUS: Select Sta

SEARCH **CLEAR**

Status	Name	Employee ID	Position
 2 ● Active	Jntest, John	78112	Home Health Aide

3. Make all necessary updates to the employee data



Personal [Schedules](#)

TITLE: Select Title FIRST NAME: Tiffany MIDDLE INITIAL:

LAST NAME: Brown SUFFIX: Select Suffix

SSN LAST 5 DIGITS: -_- GENDER: Select Gender BIRTH DATE: mm/dd/yyyy

PRIMARY SPOKEN LANGUAGE: ENG- English

Phone Numbers, Etc: HOME: () - - MOBILE: () - - WORK: () - - FAX: () - -

Address

NAME: ADDRESS LINE 1:

ADDRESS LINE 2: APT: ZIPCODE: - - -

CITY: COUNTY:

STATE: Select State ADDRESS TYPE: Select Address Type

EMAIL:

4. **SAVE & CLOSE.**

Terminating Employees

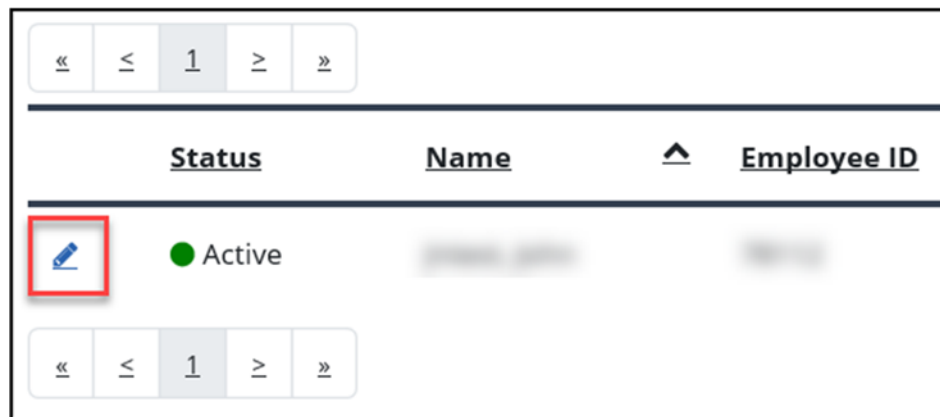
Use the Terminate option to remove employee data from Sandata EVV going forward. Terminating an employee doesn't remove them from the system but rather closes the record as of the date of the action. Employees are terminated as of the date of the action.

Any information already captured will continue to reference the employee's information. However, any new activity will not use any employees that were deleted. In other words, termination is not retroactive.

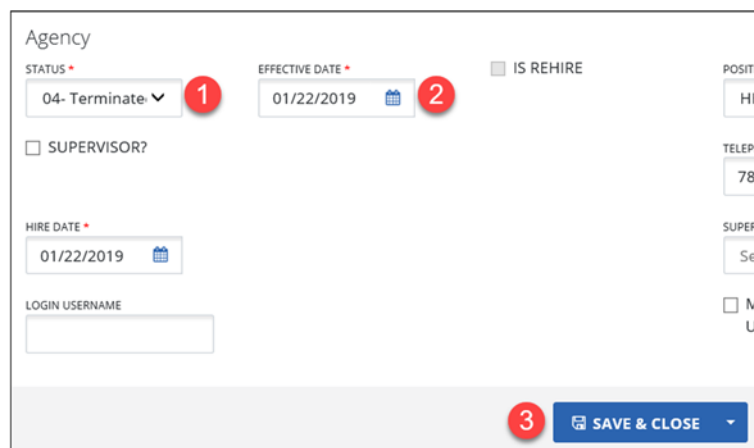


Demonstration: How to Terminate an Employee

1. Search for the employee and click **EDIT**.






2. In the Agency section, change the status from 02- Active to 04- Terminated.
3. Select the effective date of the termination.
4. SAVE & CLOSE.





Exercise: Terminate an Employee

Task	Description
1.	Use the filters on the <i>Select an Employee</i> screen to locate the employee you created.
2.	Click  .
3.	In the search results, click the  icon to the left of the employee's record
4.	In the <i>Agency</i> section, change the STATUS* field from 02-Active to 04-Terminated.
5.	Select the effective date of the termination.
6.	Click  .

Reactivating Employees

A direct care worker can also be reactivated. Search for the status of Terminated and click EDIT, to the left of the employee's status and name.



Demonstration: How to Reactivate an Employee

1. Search for the status of 04- Terminated

LAST NAME

FIRST NAME

STATUS

Q SEARCH

CLEAR

There are no records matching the provided search criteria

« ≤ 1 ≥ »

	<u>Status</u>	<u>Name</u>	<u>Employee ID</u>
<div style="border: 1px solid red; padding: 2px;"></div>	● Terminated	Jntest, John	78112

« ≤ 1 ≥ »

2. Change status from 04- Terminated to 02- Active.
3. Click the IS REHIRE checkbox if the employee is a rehire.

Agency

STATUS *

EFFECTIVE DATE

IS REHIRE




SUPERVISOR?

4. SAVE & CLOSE





Exercise: Delete/Reactivate a Direct Care Worker

Task	Description
1.	Use the filters on the <i>Select an Employee</i> screen to locate the employee you created. Remember to change the STATUS filter so terminated records are included.
2.	Click  .
3.	In the search results, click the  icon to the left of the employee's record.
4.	Change status from 04- Terminated to 02- Active. Click the IS REHIRE checkbox if the employee is a rehire.
5.	Click  .

6 Scheduling Module



Module Time

45 minutes

This lesson introduces the process of how visits are scheduled and maintained in Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- Search for a schedule;
- Create a schedule;
- Rescheduling the time of a visit;
- Replacing an employee on schedules
- Replacing a client on schedules;
- Cancelling a schedule.

Introduction

The Scheduling module allows system users to create client schedules.

Accessing Scheduling Module

A system user with the appropriate permissions will see the Scheduling link listed in the Navigation panel on the left side of the screen. Clicking on the link will launch the *Select a Schedule* screen.

Searching for Schedules

To perform a search for schedules, enter partial of a client’s last name, partial of an employee’s last name, select a program, or enter a From Date, and To Date.

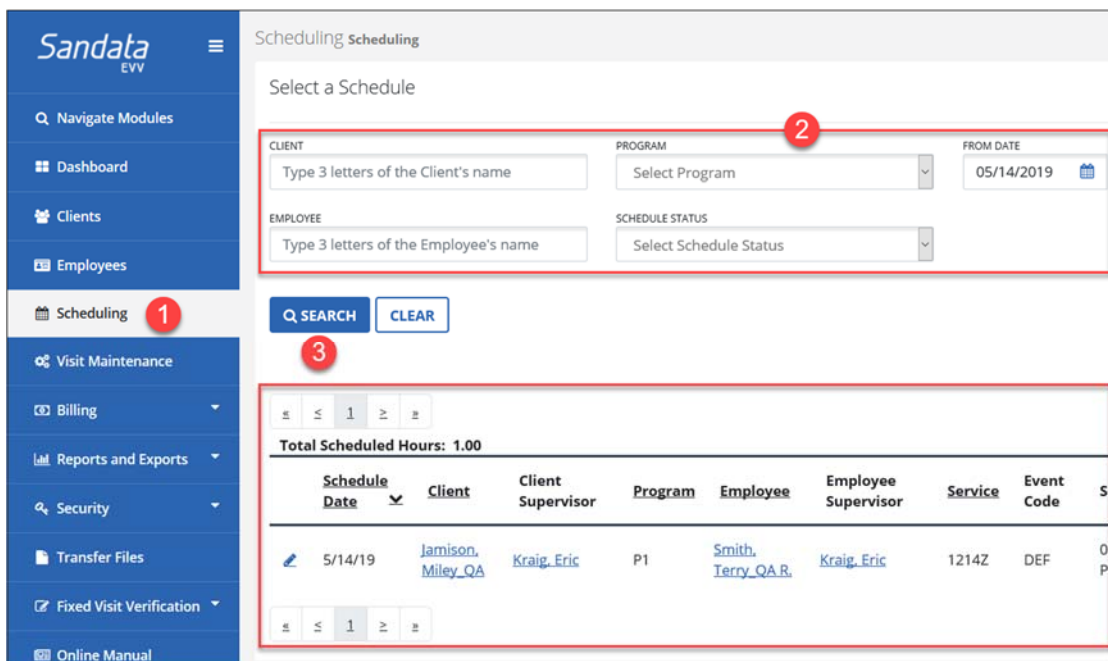


Note that a search can be conducted with no criteria entered by clicking SEARCH or pressing ENTER on the keyboard. This will result in a complete list of schedules.



Demonstration: How to search for a schedule

1. Click **Scheduling** from the Navigation panel. The *Select a Schedule* screen displays.
2. Enter values in the appropriate fields.
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



The screenshot shows the Sandata EVV Scheduling interface. On the left is a navigation menu with 'Scheduling' highlighted. The main area is titled 'Scheduling Scheduling' and 'Select a Schedule'. It contains search fields for CLIENT, PROGRAM, EMPLOYEE, and SCHEDULE STATUS, along with a FROM DATE field. A 'SEARCH' button is highlighted with a red circle and the number 3. Below the search fields, a table displays search results. The table has columns for Schedule Date, Client, Client Supervisor, Program, Employee, Employee Supervisor, Service, and Event Code. One result is shown for 5/14/19 with Client Jamison, Miley_QA, Client Supervisor Kraig, Eric, Program P1, Employee Smith, Terry_QA.R, Employee Supervisor Kraig, Eric, Service 1214Z, and Event Code DEF.

Schedule Date	Client	Client Supervisor	Program	Employee	Employee Supervisor	Service	Event Code
5/14/19	Jamison, Miley_QA	Kraig, Eric	P1	Smith, Terry_QA.R	Kraig, Eric	1214Z	DEF

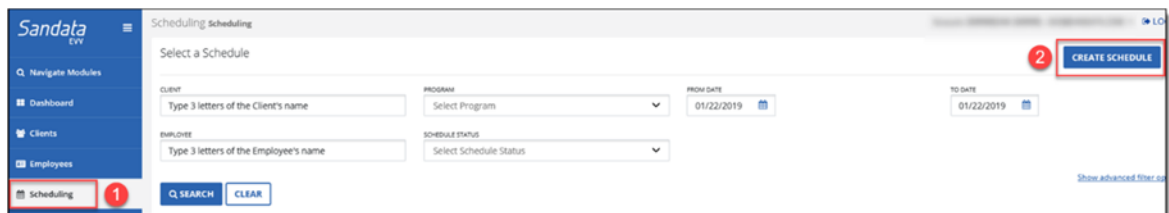
Create a New Schedule

To create a schedule, enter the **Client, Service, date, In Time and Out Time, Bill and Pay Unit Types**, and the **Payer**. Schedules can be created without assigning an employee.



Demonstration: Create a New Schedule

1. Click **Scheduling > CREATE SCHEDULE**



2. Input the appropriate criteria for the schedule

[← GO BACK](#) Create Schedule

Select a client to begin

CLIENT | PROGRAM * PAYER (MEDICAID ID) *

Type 3 letters of the Client Select Payer (Medicaid ID) ▼

Schedule Visit(s)

SERVICE * BY WEEKDAY

Select Service ▼

DATE * IN TIME HH:MM AM/PM * OUT TIME HH:MM AM/PM *

07/30/2019 --:-- -- --:-- --

AUTHORIZATION BILL UNIT TYPE *

Select Authorization Bill Unit Type ▼

EVENT CODE *

DEF- Default ▼

STATUS * EMPLOYEE

01 - Pending ▼ Type 3 letters of the Employee's name

Authorizations

No authorizations found

- **CLIENT|PROGRAM***: Shows the client for who will be provided services.
- **PAYER (MEDICAID ID)***: Automatically populates with client's Medicaid ID.
- **SERVICE***: The type or classification of the service provided.

- **BY WEEKDAY:** Select whether the service will be scheduled by weekday.
- **DATE*:** Shows the date of the schedule. Always defaults to today's date.
- **IN TIME*:** Indicates the time when the visit will be scheduled to occur.
- **OUT TIME*:** Indicates the time when the visit will be scheduled to end.
- **AUTHORIZATION BILL UNIT TYPE*:** This defines how the service time (quantity) is calculated and billed
 - **Hourly:** A service is billed for the length of the service (8 hrs. x rate).
 - **Visit:** A service is billed per visit, regardless of the time spent
 - **Units:** The standard calculation is to bill/pay by 15-minute increments. For some special events such as Travel Time and Mileage, rates calculate at a 1-minute or mile increment.
 - **Per Diem:** A service is billed for the length of the day.
- **PAY UNIT TYPE*:** This defines how the service time (quantity) is calculated and paid. Same types as the Bill Unit Types.
- **EVENT CODE*:** This agency-defined code that determines if the visit is billable, and/or payable includes payment codes and includes the following characteristics, a Live-In, In-Service Travel Time, or Mileage.
- **STATUS*:** Indicates the scheduled status of the visit
 - **Pending:** Schedules will have the status 'Pending' automatically, when a schedule is created. This status indicates that the schedule time has not yet passed, or the schedule has not been manually confirmed
 - **Confirmed:** The scheduled visit occurred and is ready for billing. This status indicates either the scheduled visit was confirmed by Sandata EVV when the field staff completed the calling process and the scheduled visit had no exceptions or the scheduled visit was manually confirmed by a user with the appropriate security permissions.
 - **Hold:** These schedules cannot be billed or paid, but the status can be confirmed later. This status is automatically assigned when a schedule has an exception, or it can be manually assigned.
- **EMPLOYEE:** Shows the care giver who will be providing services to the client



If you are setting up a schedule or schedule template for a service that requires a specific bill rate, make sure to select the appropriate Event Code from the drop-down menu. Refer to the Supplemental Training Guide for a description of the event codes for the Program.

3. Click **CREATE PREVIEW**.



Schedule Review gives you the ability to review the created schedule prior to saving to the client and employee records. The benefit of this feature is that it will minimize user error and will indicate if there are any conflicts with the schedule. For example, payer authorization is missing.

Schedule Review													
<input checked="" type="checkbox"/>		Date	Client	Employee	Service	EC	IN	OUT	Duration	Status	PRN	DF	Comments
<input type="checkbox"/>	Conflicts	1/23/19	[blurred]	[blurred]	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	
<input type="checkbox"/>	Conflicts	1/24/19	[blurred]	[blurred]	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	
<input type="checkbox"/>	Conflicts	1/25/19	[blurred]	[blurred]	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	
<input type="checkbox"/>	Conflicts	1/28/19	[blurred]	[blurred]	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	
<input type="checkbox"/>	Conflicts	1/29/19	[blurred]	[blurred]	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	
<input type="checkbox"/>	Conflicts	1/30/19	[blurred]	[blurred]	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	

Schedule Review													
<input checked="" type="checkbox"/>		Date	Client	Employee	Service	EC	IN	OUT	Duration	Status	PRN	DF	Comments
<input type="checkbox"/>	Conflicts	3/26/19	Ford, Jessie	Simpkins, Ford	1021Z	DEF- Default	12:00 PM	04:00 PM	4.00	● Pending		<input type="checkbox"/>	
<input type="button" value="SAVE"/> <input type="button" value="SAVE AS RECURRING SCHEDULE"/> <input type="button" value="CANCEL"/>													

4. Click **SAVE** or **SAVE AS RECURRING SCHEDULE**.



When you click Save, the Schedule Preview Validation dialog box will display. Based on user privileges if there are any conflicts, the override checkbox will be enabled to continue saving the schedules. Without the user privileges, only cancel will be enabled.

Schedule Preview Validation ×

Summary

Authorization Violations	5	<input type="checkbox"/> OVERRIDE
Time Conflicts	0	
Overtime Warnings	0	

SAVE SCHEDULES **CANCEL**



When you click SAVE AS RECURRING SCHEDULE, a message will display stating that existing recurring schedules on the client record will be deleted. Click OK to Continue or Cancel to Discontinue this process.

Confirm Recurring Save

Existing Recurring Schedules will be deleted.

Click 'OK' to Continue or
'Cancel' to Discontinue this process.

OK **CANCEL**

5. Click **SAVE SCHEDULES**.



Exercise: Create a New Schedule


Task	Description
1.	Click the <i>Scheduling Module</i> on the navigation panel.
2.	Click the CREATE SCHEDULE button in the upper-right corner of the screen.
3.	Enter the CLIENT PROGRAM, PAYER (MEDICAID ID), SERVICE, TYPE, DATE, IN TIME, OUT TIME, AUTHORIZATION BILL TYPE, PAY UNIT TYPE, EVENT CODE, and STATUS into their respective fields.
4.	Enter an employee.
5.	Click CREATE PREVIEW . Review the preview for any possible mistakes or conflicts.
6.	Click SAVE .
7.	At the Schedule Preview Validation screen, click SAVE SCHEDULE .
8.	A screen displays stating the listed schedules have been saved. Click OK .
9.	Back at the <i>Select a Schedule</i> screen, use the filters to search for the schedule you just created.

Reschedule a Visit

To reschedule a visit, enter the new date if necessary, times in the times proposed fields, and the bill rate.



Follow Me: How to reschedule a visit

1. Search for a schedule.
2. Under Actions, click Edit Schedule ().

Select a Schedule

CLIENT PROGRAM


EMPLOYEE SCHEDULE STATUS

Q SEARCH **CLEAR**

1

⏪ ⏩ 1 ⏪ ⏩

Total Scheduled Hours: 4.00

Actions	Schedule Date	Client	Client Supervisor	Program	Employee
 2	1/23/19	Intest, Arianna		P1	Testy, Firsty

⏪ ⏩ 1 ⏪ ⏩

3. Enter the new date if necessary and proposed times.

[← GO BACK](#) Edit Schedule

Schedule Details

STATUS DATE SERVICE






Times

	IN TIME HH:MM AM/PM *	OUT TIME HH:MM AM/PM *	
Proposed	<input type="text" value="12:00 PM"/>	<input type="text" value="04:00 PM"/>	= 4.00 hrs
Actual	<input type="text" value="--:-- --"/>	<input type="text" value="--:-- --"/>	= 4.00 hrs
Adjusted	<input type="text" value="12:00 PM"/>	<input type="text" value="04:00 PM"/>	= 4.00 hrs

4. Click **SAVE**.



Exercise: Reschedule a Visit

Task	Description
1.	Use the filters on the <i>Select a Schedule</i> screen to locate the schedule you created.
2.	Click  .
3.	In the search results, click the  icon to the left of the schedule that you want to edit.
4.	Enter the new date if necessary and proposed times.
5.	Click  .
6.	At the Schedule Preview Validation screen, click  .
7.	A screen displays stating the listed schedules have been saved. Click  .

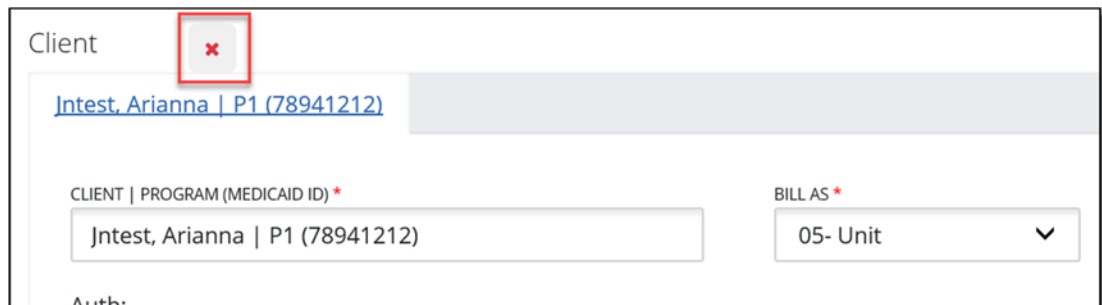
Removing and Replacing a Client on Schedules

Use this feature to remove or replace a client on a scheduled visit.



Follow Me: How to remove or replace a client on schedules

1. In the Client section, click the **X** icon to remove the existing client.



Client ✕

[Jntest, Arianna | P1 \(78941212\)](#)

CLIENT | PROGRAM (MEDICAID ID) * BILL AS *

Jntest, Arianna | P1 (78941212) 05- Unit ▾

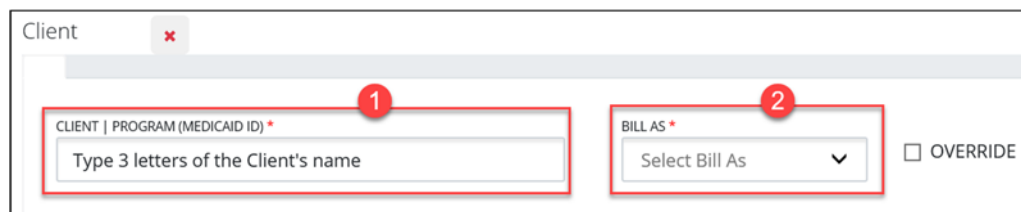
Auth:

2. Click the **+** icon to add a new client



Client +

3. Search for the client by entering in three letters of the client's name
4. From the **Bill As** menu, select the Bill Rate.

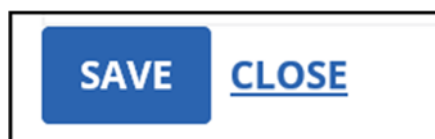


Client ✕

1 CLIENT | PROGRAM (MEDICAID ID) * 2 BILL AS * OVERRIDE

Type 3 letters of the Client's name Select Bill As ▾








5. Click **SAVE**.



SAVE [CLOSE](#)



Exercise: Removing and Replacing a Client on Schedules

Task	Description
1.	Use the filters on the <i>Select a Schedule</i> screen to locate the schedule you created.
2.	Click  .
3.	In the search results, click the  icon to the left of the schedule that you want to edit.
4.	In the Client section, click the  icon to remove the existing client.
5.	Click the  icon to add a new client.
6.	Search for the client by entering in three letters of the client's name.
7.	From the Bill As menu, click the Bill Rate.
8.	Click  .
9.	At the Schedule Preview Validation screen, click  .
10.	A screen displays stating the listed schedules have been saved. Click  .

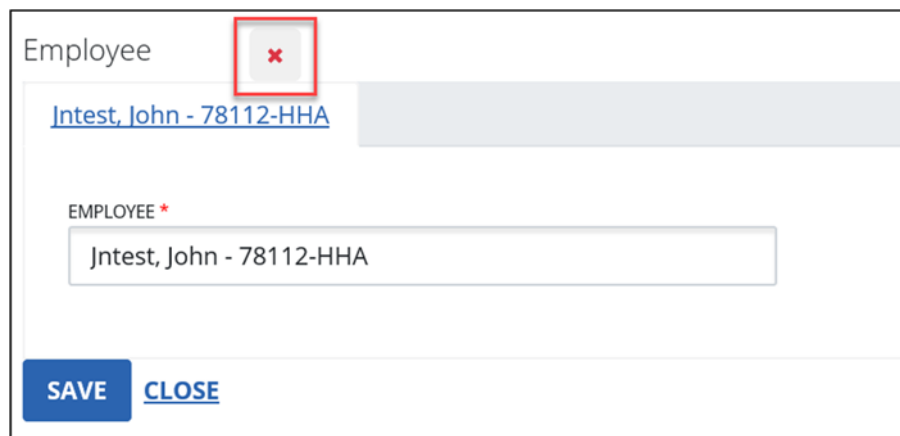
Removing and Replacing an Employee on Schedules

Use this feature to remove or replace an employee on a scheduled visit.



Follow Me: How to remove and replace an employee on schedules

1. In the Employee section, click the **X** icon to remove the existing employee.



Employee ✕

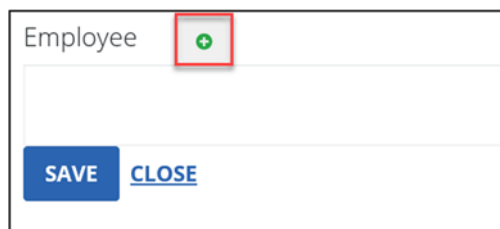
[Jntest, John - 78112-HHA](#)

EMPLOYEE *

Jntest, John - 78112-HHA

SAVE [CLOSE](#)

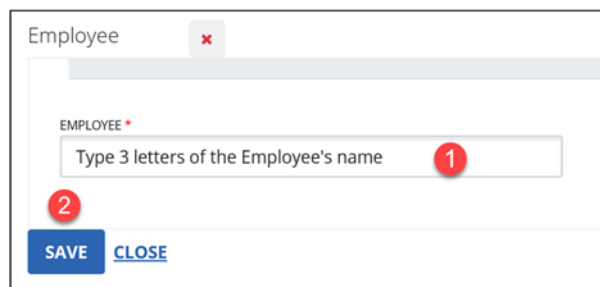
2. Click the **+** icon to add a new employee



Employee +

SAVE [CLOSE](#)

3. Search for the employee by entering in three letters of the employee's name
4. Click **SAVE**.



Employee ✕








EMPLOYEE *

Type 3 letters of the Employee's name 1

2 **SAVE** [CLOSE](#)



Exercise: Removing and Replacing an Employee on Schedules

Task	Description
1.	Use the filters on the <i>Select a Schedule</i> screen to locate the schedule you created.
2.	Click  .
3.	In the search results, click the  icon to the left of the schedule that you want to edit.
4.	In the Employee section, click the  icon to remove the existing employee.
5.	Click the  icon to add a new employee.
6.	Search for the employee by entering in three letters of the employee's name.
7.	Click  .
8.	At the Schedule Preview Validation screen, click  .
9.	A screen displays stating the listed schedules have been saved. Click  .

Cancelling a Scheduled Visit

Use this feature to cancel a scheduled visit.



Follow Me: How to cancel a scheduled visit

1. To cancel a scheduled visit, change the status from 01- Pending to 10- Cancelled

Schedule Details

STATUS 10- Cancelled ▼	DATE * 01/30/2019	SERVICE * 1021Z- Personal Care Service
Times		
Proposed	IN TIME HH:MM AM/PM * 01:00 PM	OUT TIME HH:MM AM/PM * 05:00 PM

2. Click **SAVE**.



3. The Schedule Preview Validation dialog box appears.

4. Click **SAVE SCHEDULE**.

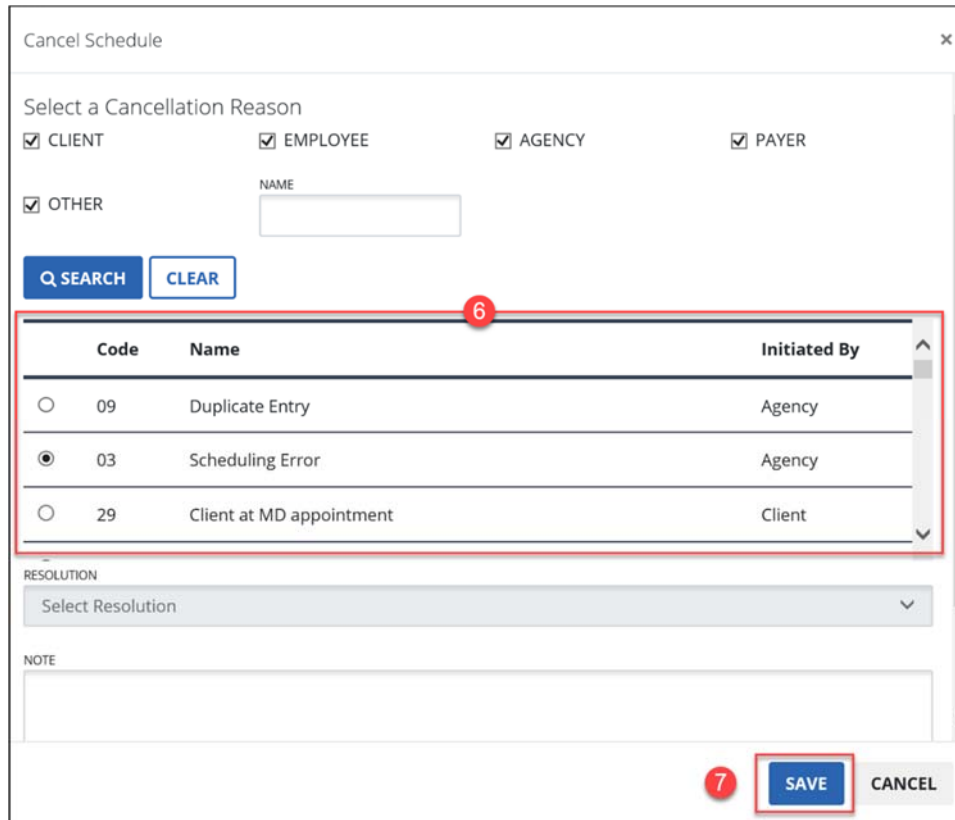
Schedule Preview Validation ×

Summary

Authorization Violations	0
Time Conflicts	0
Overtime Warnings	0

SAVE SCHEDULE
CANCEL

5. The Cancel Schedule dialog box appears.
6. Select a cancellation reason
7. Click **SAVE**.



Cancel Schedule

Select a Cancellation Reason

CLIENT EMPLOYEE AGENCY PAYER

OTHER NAME

Code	Name	Initiated By
<input type="radio"/> 09	Duplicate Entry	Agency
<input checked="" type="radio"/> 03	Scheduling Error	Agency
<input type="radio"/> 29	Client at MD appointment	Client

RESOLUTION
Select Resolution

NOTE




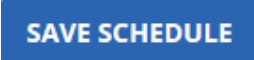


8. Click **OK**.



Your changes have been saved successfully.



Exercise: Cancelling a Visit

Task	Description
1.	Use the filters on the <i>Select a Schedule</i> screen to locate the schedule you created.
2.	Click  .
3.	In the search results, click the  icon to the left of the schedule that you want to edit.
4.	Change status from 01- Pending to 10- Cancelled
5.	Click  .
6.	At the Schedule Preview Validation screen, click  .
7.	The Cancel Schedule dialog box appears.
8.	Select a cancellation reason
9.	Click  .
10.	A screen displays stating the changes have been saved successfully. Click  .

Recurring Schedule Templates

To reiterate, a recurring schedule template is a template that will be copied over from week to week. This can be very useful given that it allows you to schedule staff members to a particular case according to the authorizations received.

Create a Recurring Schedule Template

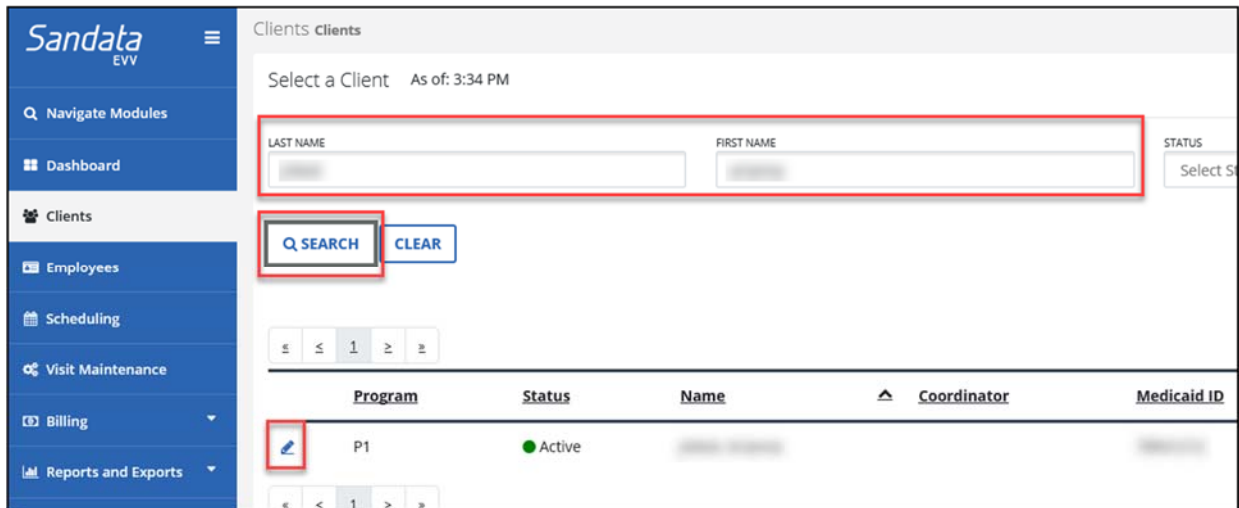


Best practice is to create a recurring schedule pattern that last for two weeks and that a pattern last no longer than four weeks. A recurring schedule pattern can be pushed forward for as long as needed.



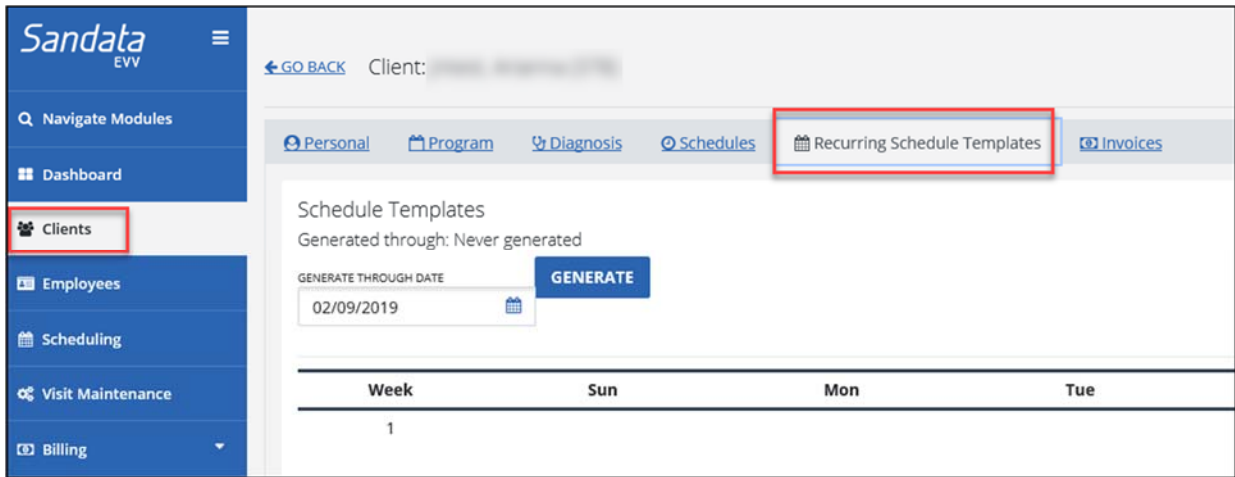
Demonstration: How to create a recurring schedule template

1. Search for the client and click **EDIT**.

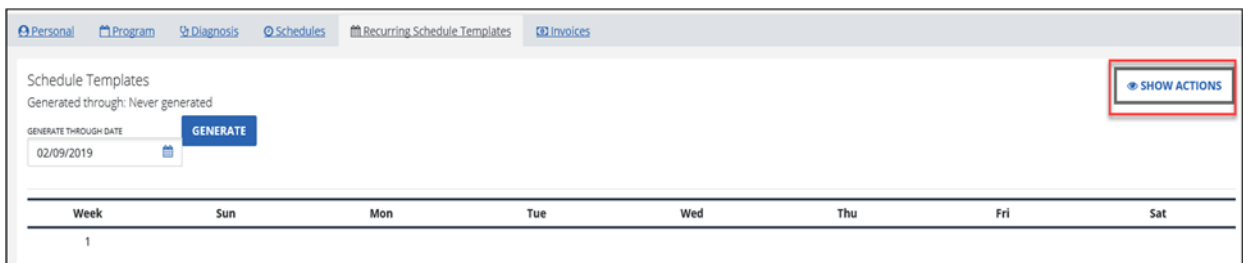


Program	Status	Name	Coordinator	Medicaid ID
P1	Active			

2. Within the client record, navigate to the *Recurring Schedule Templates* tab.

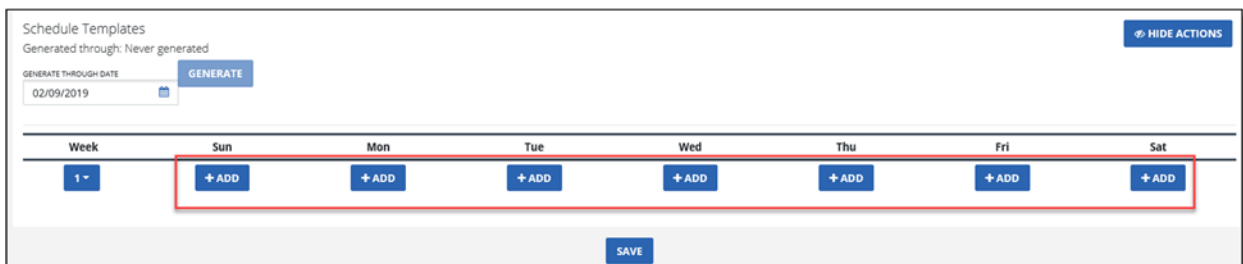


3. Click **SHOW ACTIONS** to display executable actions on the days of the week.



Note that the Show Actions button will become Hide Actions when clicked.

4. Click the **ADD** button on the day that the recurring schedule will start.



5. Enter the info for the new recurring template and click **ADD NEW**.

New Recurring Template

SERVICE *
1021Z- Personal Care Services

EMPLOYEE

EVENT CODE *
DEF- Default

TIME IN TIME HH:MM AM/PM
--:-- --

TIME OUT TIME HH:MM AM/PM
--:-- --

BILL TYPE *
01- Hourly

COMMENTS

ACTIVE

2 ADD NEW CANCEL



If you are setting up a schedule or schedule template for a service that requires a specific bill rate, make sure to select the appropriate Event Code from the drop-down menu. Refer to the Supplemental Training Guide for a description of the event codes for the Program.

Schedule Templates

Generated through: Never generated








GENERATE THROUGH DATE 02/09/2019 GENERATE

Week	Sun	Mon	Tue
1 ▾	+ ADD	+ ADD	+ ADD
<div style="border: 1px solid green; padding: 5px; display: inline-block;"> <p>1021Z: 16:00 - 20:00</p> <p>Jntest, John</p> <p>Active ✎ 🔄 🗑️</p> </div>			

6. Click **SAVE**.



Exercise: Create a Recurring Schedule Template

Task	Description
1.	Search for your client that you created and click 
2.	Within the client record, navigate to the  Recurring Schedule Templates tab.
3.	Click  to display executable actions on the days of the week.
4.	Click the  button on the day that the recurring schedule will start.
5.	Enter the info for the new recurring template and click  .
6.	Click  .
7.	A screen displays stating the changes have been saved successfully. Click  .

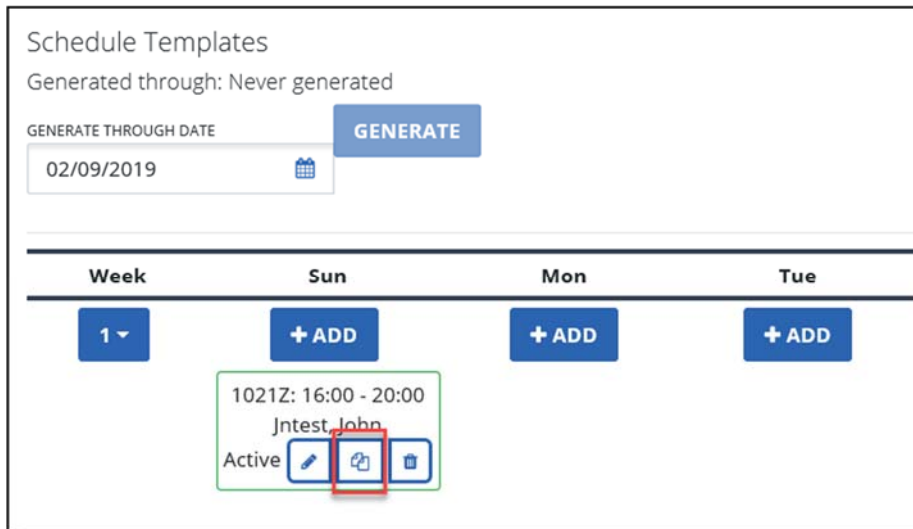
Copying Recurring Schedule Templates

If you wish to apply a previously created template to additional days, clicking the Copy Template icon will display Paste buttons. Clicking any of the paste buttons will paste the template to the days that are selected.



Follow Me: How to copy a recurring schedule template

1. Click the **COPY TEMPLATE** Icon.

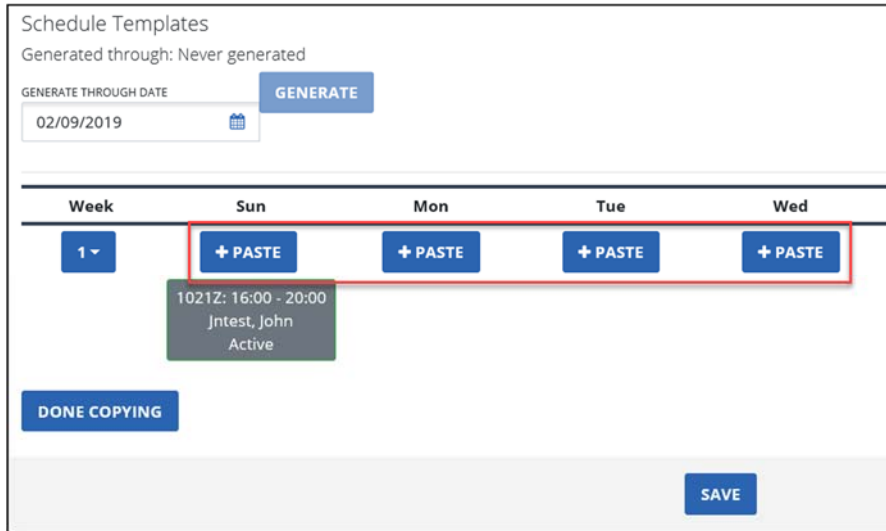


Schedule Templates
Generated through: Never generated

GENERATE THROUGH DATE

Week	Sun	Mon	Tue
<input type="button" value="1"/>	<input type="button" value="+ ADD"/>	<input type="button" value="+ ADD"/>	<input type="button" value="+ ADD"/>
	<div style="border: 1px solid green; padding: 5px;"><p>1021Z: 16:00 - 20:00 Jntest, John Active <input type="button" value="edit"/> <input type="button" value="copy"/> <input type="button" value="delete"/></p></div>		

2. Click the **PASTE** Button on any of the days that the template needs to be applied to.



Schedule Templates
Generated through: Never generated

GENERATE THROUGH DATE








Week	Sun	Mon	Tue	Wed
1 ▾	<input type="button" value="+ PASTE"/>	<input type="button" value="+ PASTE"/>	<input type="button" value="+ PASTE"/>	<input type="button" value="+ PASTE"/>

1021Z: 16:00 - 20:00
Jntest, John
Active

3. Click **DONE COPYING**
4. Click **SAVE**.



Exercise: Copying a Recurring Schedule Template

Copying Recurring Schedule Templates	
Task	Description
1.	Search for your client that you created and click 
2.	Within the client record, navigate to the  Recurring Schedule Templates tab.
3.	Click  to display executable actions on the days of the week.
4.	Click the  icon to copy the template.
5.	Click the  button on ny of the days that the template needs to be applied to.
6.	Click  .
7.	Click  .

Generate Recurring Schedule Template

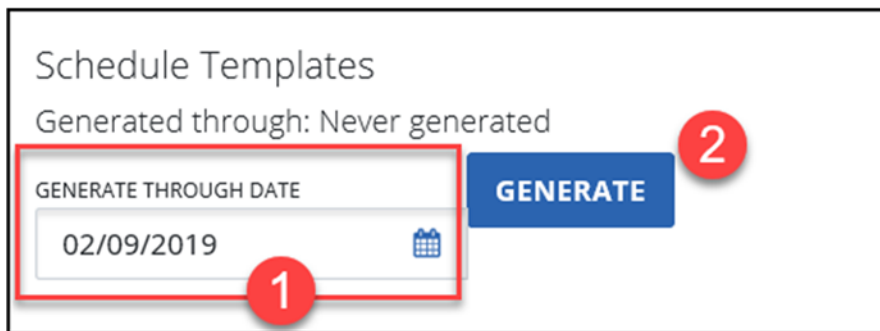
Use this feature when you want to generate schedules past the normal pattern to capture changes. For example:

“The regular caregiver for a client will be away for a month and the schedules need to be updated with the replacement. There are only schedules for the next 2 weeks so you need to generate the schedules for the client for the month then make the necessary updates”.



Follow Me: Generate recurring schedule template

1. From the Schedule Templates screen, specify the Generate Through date.

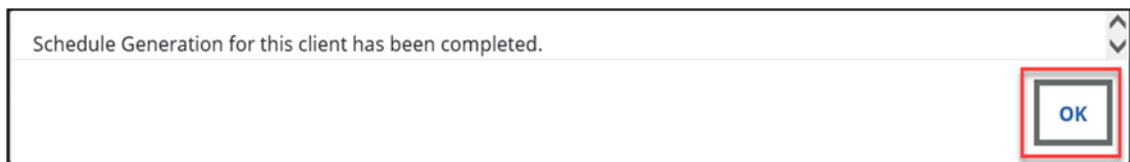


Schedule Templates
Generated through: Never generated

GENERATE THROUGH DATE
02/09/2019

GENERATE

2. Click **GENERATE**. When the schedules are generated, a pop up window will appear stating the schedule generation has been completed.
3. Click **OK**.



Schedule Generation for this client has been completed.

OK

7 EVV-SMC/TVV

Module Time

30 minutes

This lesson introduces the module device call-in/call-out process and the telephone call process which employees utilize for every visit.

Module Objectives

After completing this lesson, you will be able to:

- Explain the purpose and basic functionality of Sandata Mobile Connect (SMC);
- access and log on to Sandata Mobile Connect;
- Identify the SMC window elements and explain how to navigate within the SMC App;
- describe the back-up process utilizing the client's telephone or any phone associated with the client; and
- explain the different Call Reference Guides (CRG) available for use.

Introduction

Sandata Mobile Connect allows an employee to start and end a visit without requiring the use of the client's home telephone.

SMC is the primary and preferred method of calling in and out for client visits.



An employee can start a visit using SMC and complete the visit using TVV and vice versa, if required.

Set Up and Credentialing

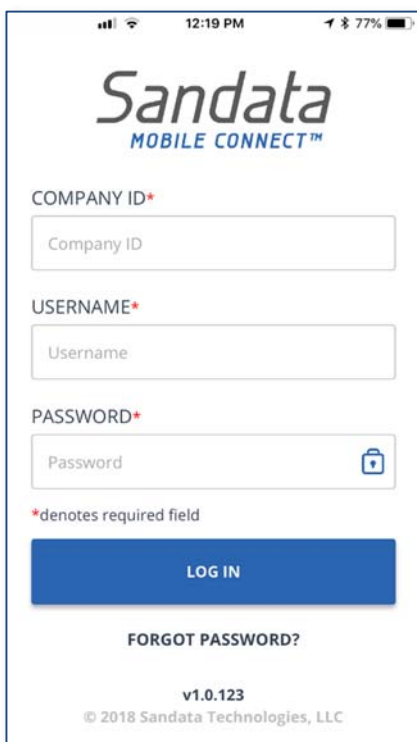
SMC user credentials for employees are generated when the employee is created as an Employee in Sandata EVV.

When an agency provider creates an employee, the following information must be specified in the employee profile in order for SMC to create login credentials.

- First and Last name
- Valid email address
- Social Security Number
- Check the **MOBILE User** checkbox in the *Employment* section

When these values are captured and the employee record is saved, Sandata EVV generates a temporary SMC password and emails it to the employee at the email address entered.

Initial Set-up



The screenshot shows the Sandata Mobile Connect login interface. At the top, the Sandata logo and 'MOBILE CONNECT™' are displayed. Below the logo, there are three input fields: 'COMPANY ID*' with a placeholder 'Company ID', 'USERNAME*' with a placeholder 'Username', and 'PASSWORD*' with a placeholder 'Password' and a lock icon. A note below the fields states '*denotes required field'. A blue 'LOG IN' button is positioned below the fields. At the bottom, there is a 'FORGOT PASSWORD?' link, the version number 'v1.0.123', and the copyright notice '© 2018 Sandata Technologies, LLC'.

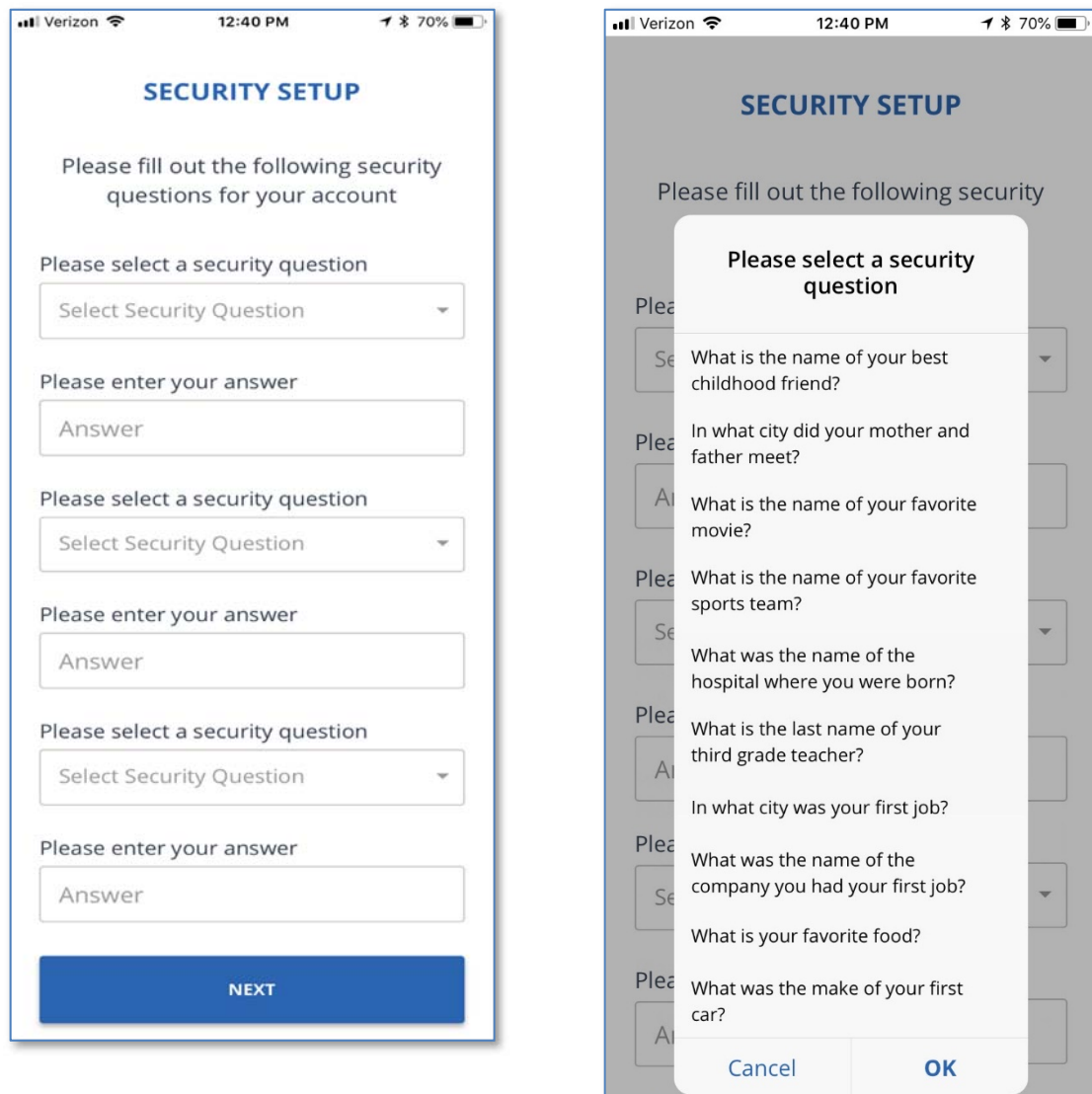
When the employee logs in to SMC for the first time, he or she will need to enter the following data elements:

- **Company ID:** 2-Sandata account # (always the number 2 plus a dash and the agency provider's assigned Sandata account #)
- **Username:** employee's email address
- **Password:** the temporary password emailed to the employee's email address entered when creating the employee



Tapping the lock icon in the **PASSWORD** field displays the password. Displaying the password can help with initial log-in and temporary password entry.

Upon logging in to SMC for the first time, the employee is asked to select and define answers to a set of security questions. The security questions are:



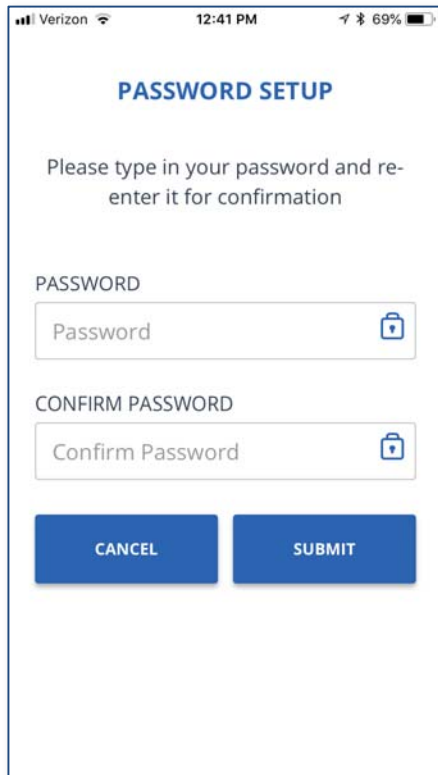
The left screenshot shows the "SECURITY SETUP" screen with the following text: "Please fill out the following security questions for your account". It contains three identical sections, each with a dropdown menu labeled "Please select a security question" (with "Select Security Question" as the placeholder), a text input field labeled "Please enter your answer" (with "Answer" as the placeholder), and a blue "NEXT" button at the bottom.

The right screenshot shows a modal dialog titled "Please select a security question" with a list of questions: "What is the name of your best childhood friend?", "In what city did your mother and father meet?", "What is the name of your favorite movie?", "What is the name of your favorite sports team?", "What was the name of the hospital where you were born?", "What is the last name of your third grade teacher?", "In what city was your first job?", "What was the name of the company you had your first job?", "What is your favorite food?", and "What was the make of your first car?". The dialog has "Cancel" and "OK" buttons at the bottom.

After answering the required security questions, the next screen prompts the employee to create a new password.



To verify the reset of a password later, SMC requires the security questions selected at set-up to be answered.



PASSWORD SETUP

Please type in your password and re-enter it for confirmation

PASSWORD

CONFIRM PASSWORD

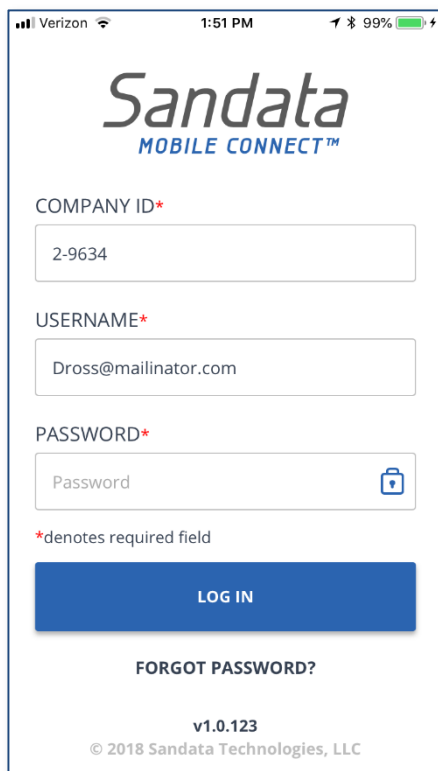
CANCEL SUBMIT

1. Enter the **New Password**.



Passwords are **case sensitive**. They must be at least eight characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (i.e. @\$%^).

2. **Confirm Password**.
3. Click **SUBMIT** after entering the new password.



Sandata
MOBILE CONNECT™

COMPANY ID*

USERNAME*

PASSWORD*

*denotes required field

LOG IN

FORGOT PASSWORD?

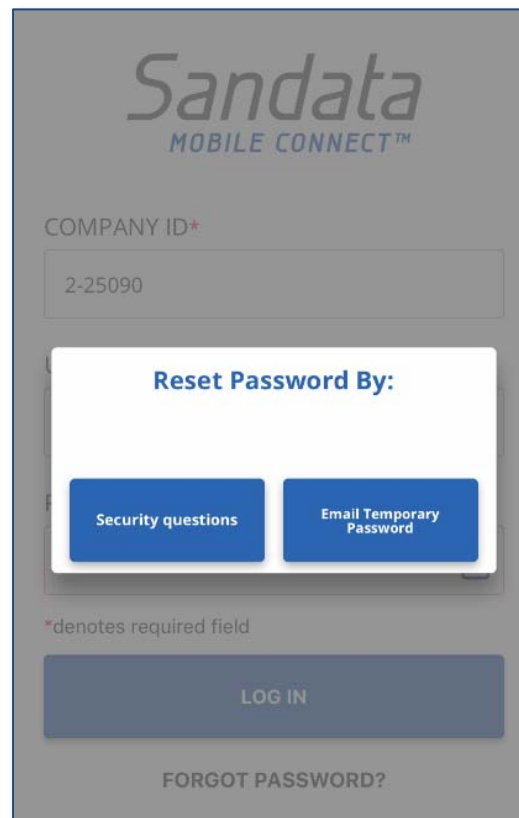
v1.0.123
© 2018 Sandata Technologies, LLC

The Login screen displays. The employee uses the new password at the next login.

Resetting a Forgotten Password

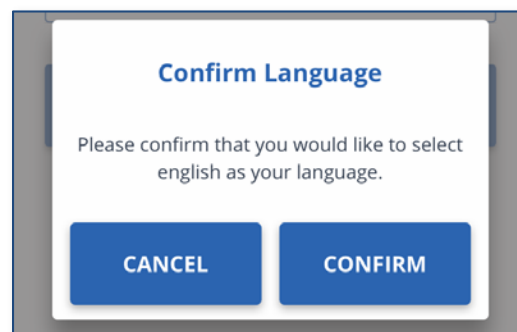
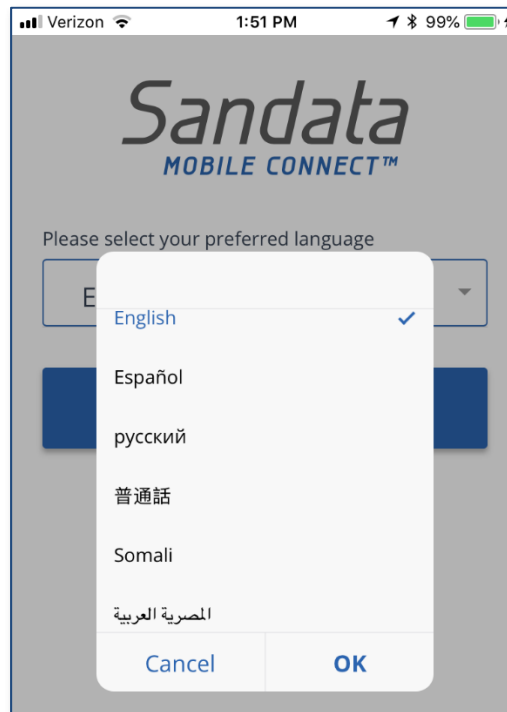
If an employee forgets their password, they can simply tap the **FORGOT PASSWORD?** link on the login screen. The employee is prompted to choose which method they wish to use to reset their password.

- **Security Questions:** This option displays the security questions the employee chose during the initial set up.
- **Email Temporary Password:** This option prompts the employee to enter their email to receive a temporary password to use to set new permanent password.



The screenshot shows the Sandata Mobile Connect login interface. At the top, the Sandata logo and 'MOBILE CONNECT™' are displayed. Below this is a 'COMPANY ID*' field with the value '2-25090'. A white box titled 'Reset Password By:' contains two blue buttons: 'Security questions' and 'Email Temporary Password'. Below the buttons, a note states '*denotes required field'. At the bottom of the screen, there is a 'LOG IN' button and a 'FORGOT PASSWORD?' link.

After successfully logging in with the new password, the next screen prompts the employee to confirm the language preference from a drop-down list on the screen.



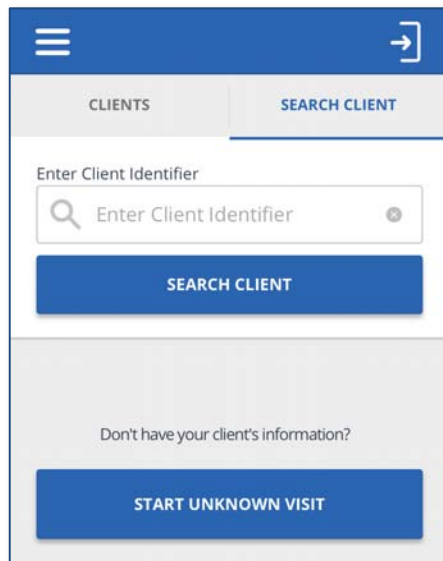
After confirming the language preference on the device, the *Home* screen displays.



The preferred language must be selected the first time the employee logs in to a new device.


Navigating the Home screen

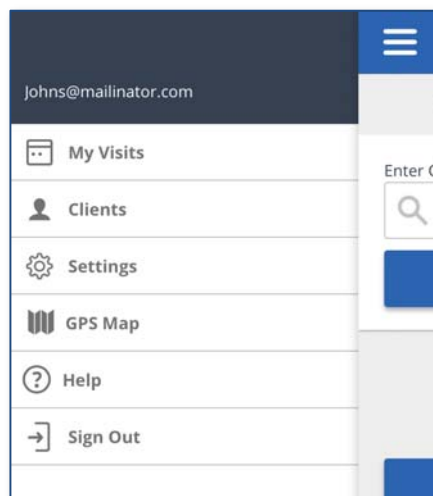
Upon successfully logging in to SMC, the user is presented with the *Home* screen. From this screen, the user is able to:



- **Search for a client to start a visit** – tap into the **ENTER CLIENT IDENTIFIER** field and enter the ID to search for the client.
- **Start an unknown visit** – tap the **START UNKNOWN VISIT** to enter the client’s name and Medicaid ID in order to start the visit.

The user can also tap the menu icon in the upper-left corner of the screen to access:

- **My Visits** -
- **Clients** – to perform a client search.
- **Settings** – to change language preference and password. All other options on the settings screen are disabled.
- **Help** – to open the SMC help guide.
- **Sign Out** – to exit SMC (The user can also tap the **Sign Out** icon  in the upper-right corner of the screen to log out of SMC).



Starting an Unscheduled Visit

When the employee arrives to provide care to the client, he or she will:

1. Log in to SMC.
2. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the ID of the client.

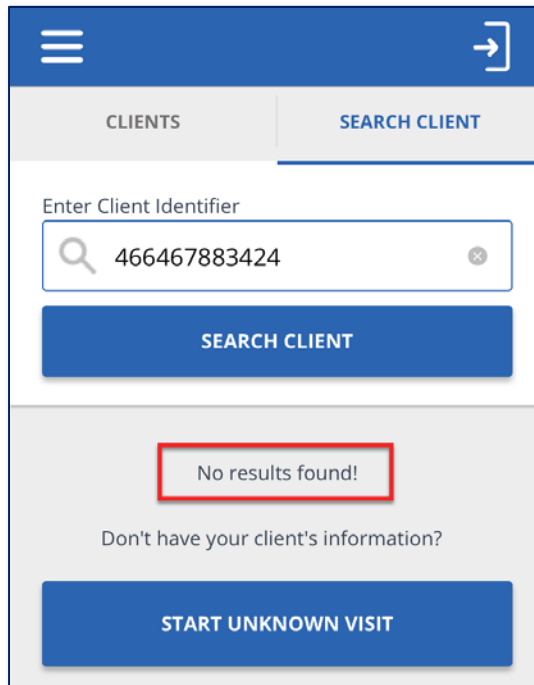
Starting an Unknown Visit



If the ID entered is not found, the employee can still call-in and out by starting an unknown visit.

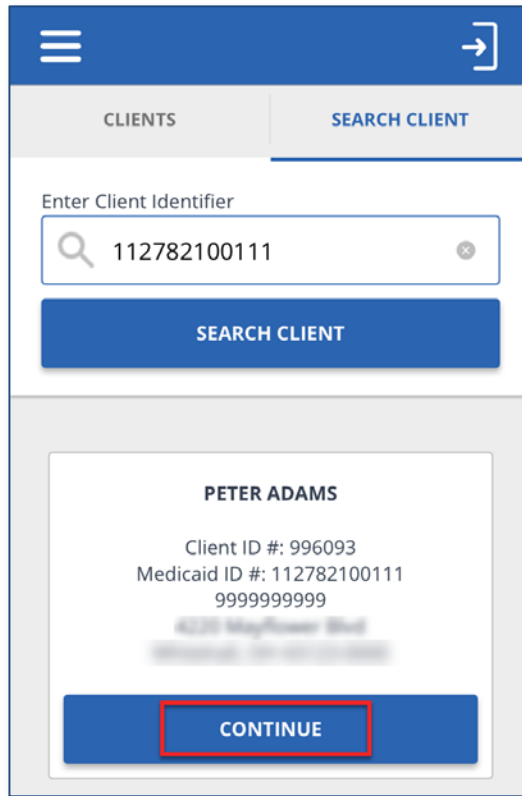
This will be covered after the known client call-in/call-out process.

3. Tap the **SEARCH CLIENT** button. (If ID entered does not match to any client, a “no results found” message displays).

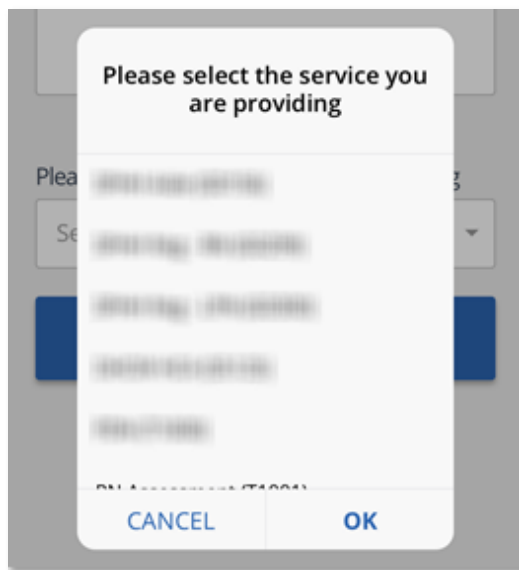


The screenshot shows the mobile application interface for searching clients. At the top, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. Below the tabs is a search input field labeled 'Enter Client Identifier' containing the number '466467883424'. A magnifying glass icon is on the left of the input field, and a close icon is on the right. Below the input field is a blue button labeled 'SEARCH CLIENT'. Below the button, a red box highlights the text 'No results found!'. Underneath this message is the text 'Don't have your client's information?' and a blue button labeled 'START UNKNOWN VISIT'.

4. Tap the **CONTINUE** button when the search results display.

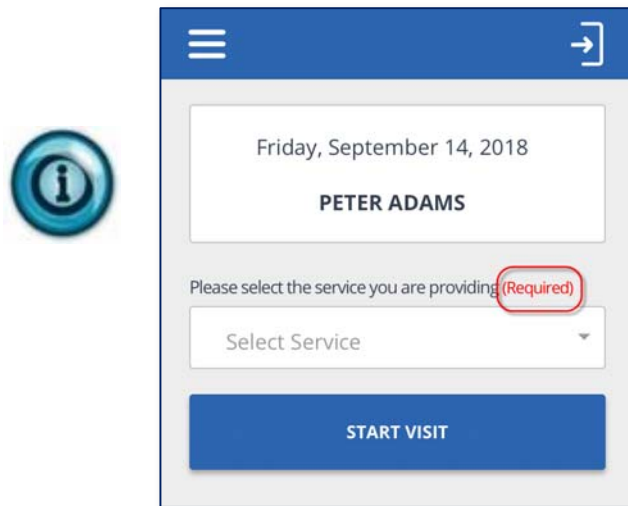


5. Select the *Service* from the drop-down list

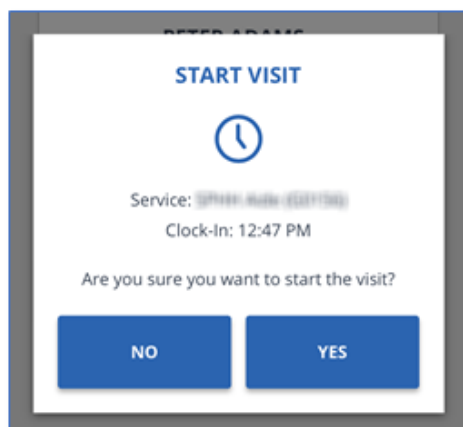


Service Selection Note

A service must be selected in order to start a visit. If a service is not chosen and the employee taps the **START VISIT** button, a pop-up appears indicating “no service selected”.



-
6. Tap the **START VISIT** button. A pop-up screen appears asking the employee to confirm the start of the visit.



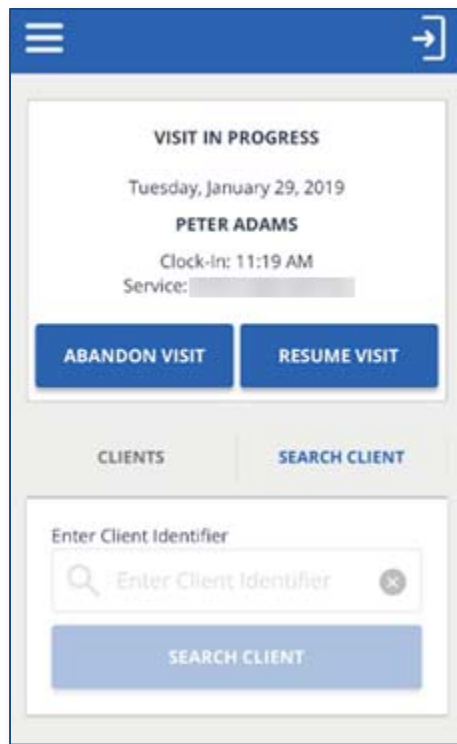
7. Log out of SMC and proceed with providing care.



To ensure security, after a configured period of inactivity, the employee is automatically logged out of SMC.

Completing an Unscheduled Visit

1. Log in to SMC. The *Home* screen shows the visit is in progress. Tap **RESUME VISIT**.



ABANDON VISIT button

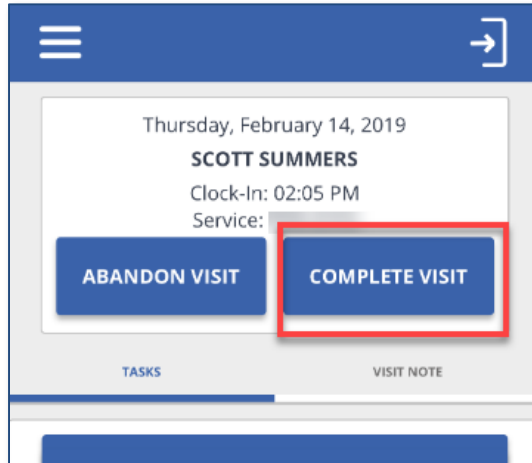


The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

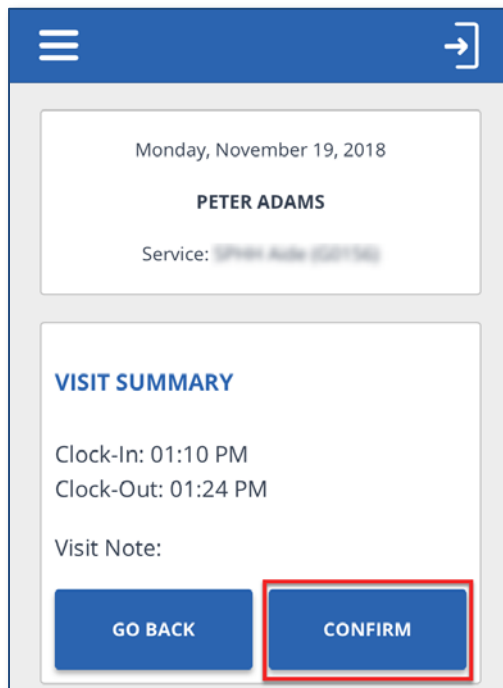


Please be aware that notes are not required. This **Visit Note** field should **not** be used to satisfy documentation requirements. This **Visit Note** field should **not** be used to capture any clinical data.

2. Tap **COMPLETE VISIT**.



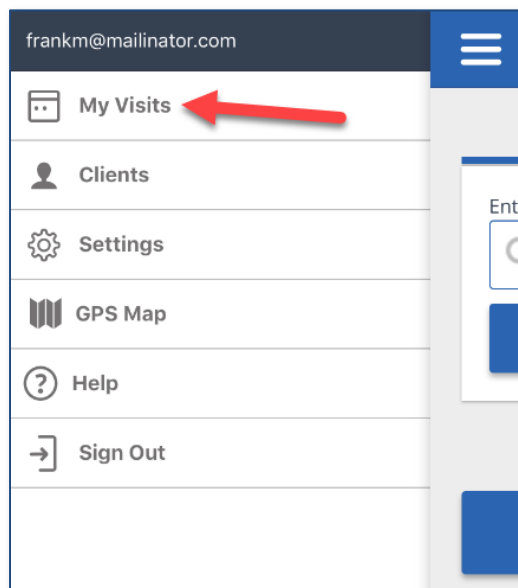
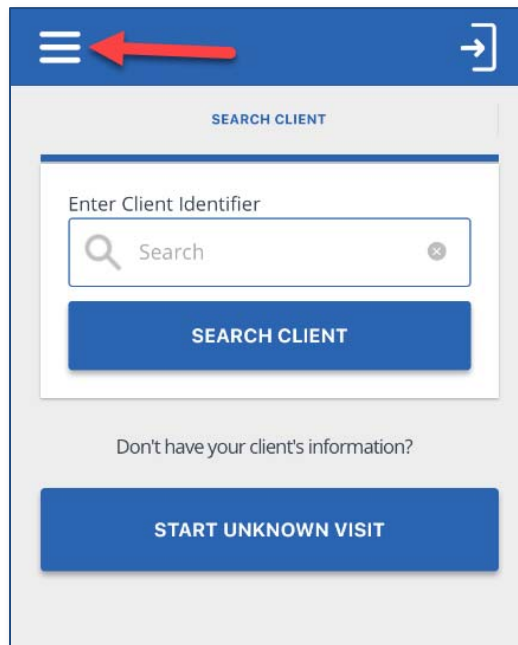
3. The *Visit Summary* screen displays. Tap **CONFIRM**.



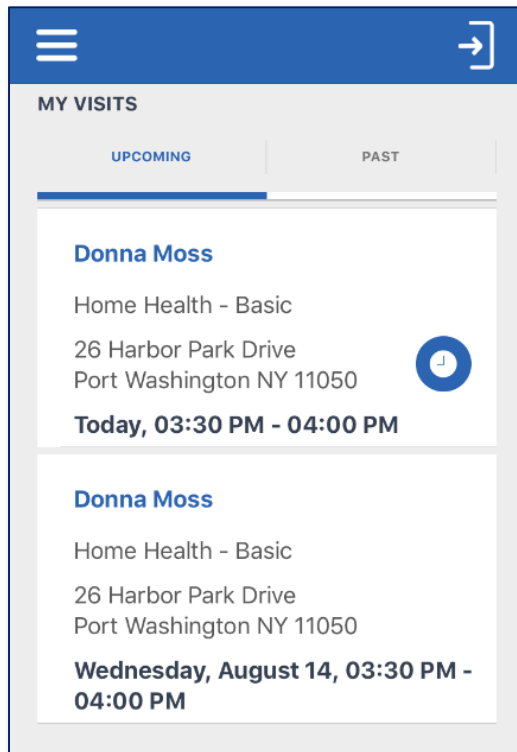
Starting a Scheduled Visit

When the employee arrives to provide care to the client, he or she will:

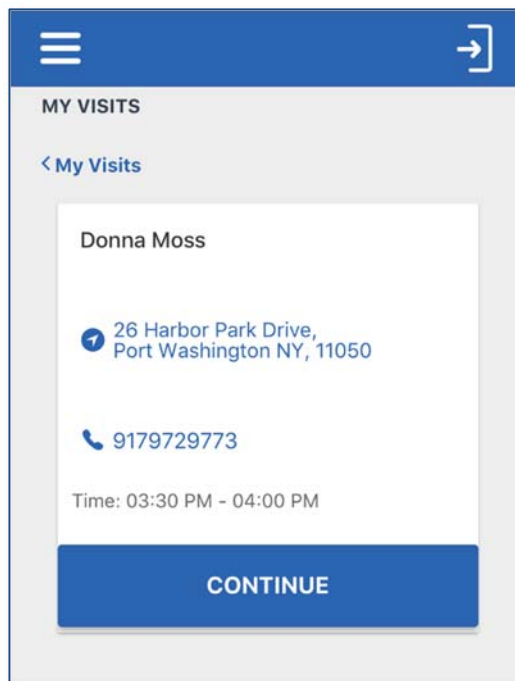
1. Log in to SMC.
2. Tap on the menu icon in the upper-left corner and tap **My Visits** to view the scheduled visits.



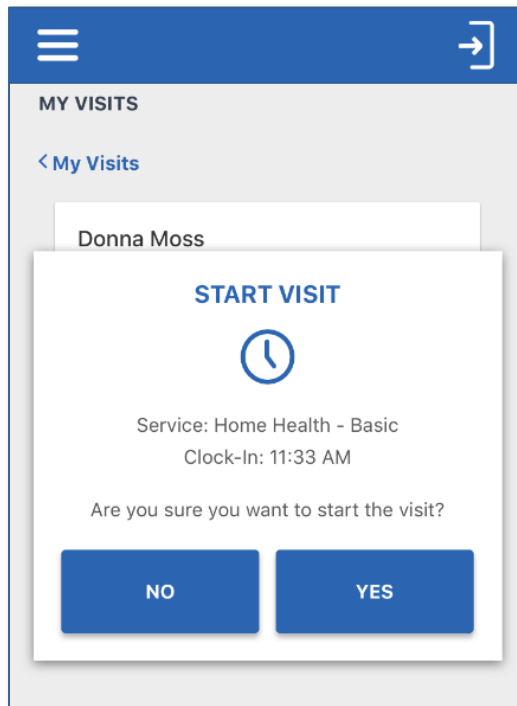
3. Tap the upcoming schedule to start the visit.



4. Tap the **CONTINUE** button.



5. A *Start Visit* pop-up screen appears asking the employee to tap **YES** to confirm the start of the visit.



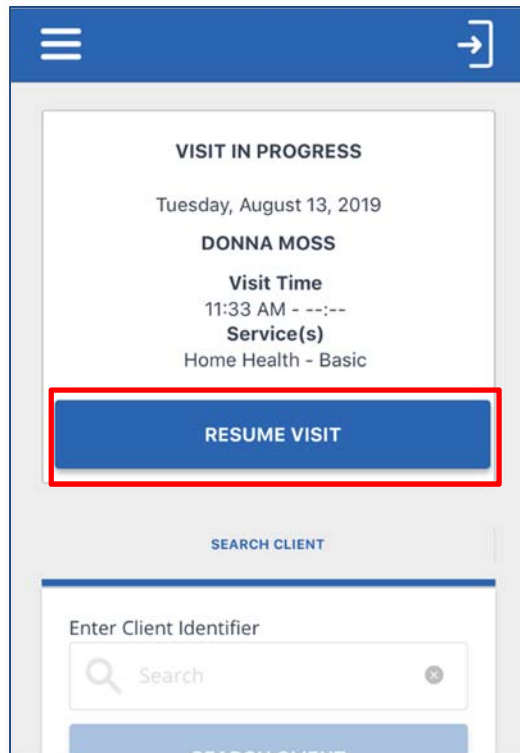
6. Log out of SMC and proceed with providing care.



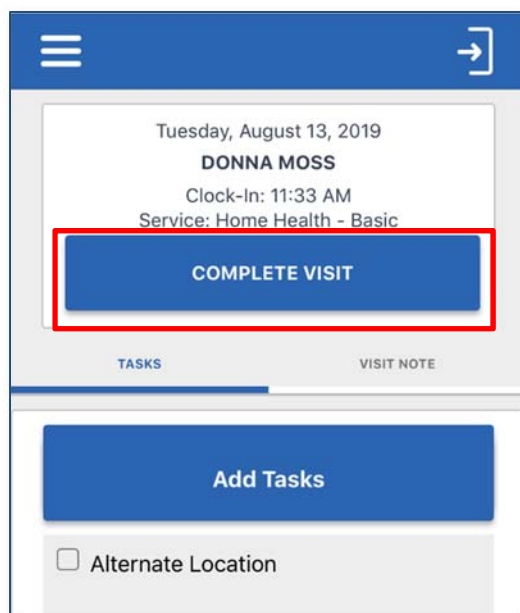
To ensure security, after a configured period of inactivity, the employee is automatically logged out of SMC.

Completing a Scheduled Visit

1. Log in to SMC. The *Home* screen shows the visit is in progress. Tap **RESUME VISIT**.



2. Tap **COMPLETE VISIT**.



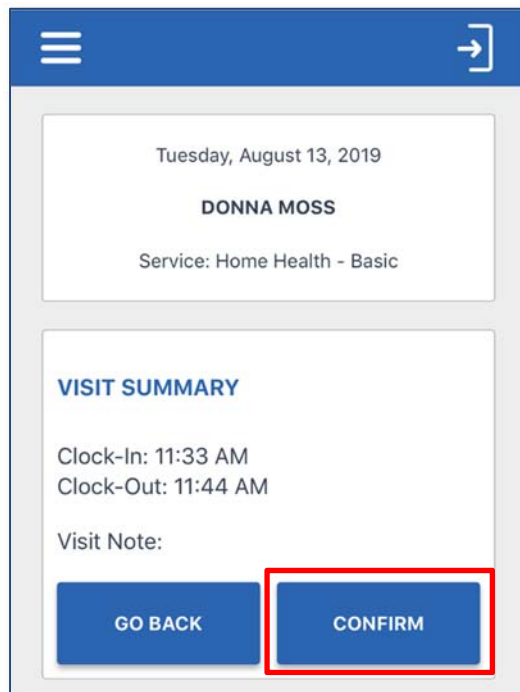


If a visit is conducted away from the client's home, the Alternate Location task should be selected for the visit.



Please be aware that a Visit Note is not required to complete a visit.

3. The *Visit Summary* screen displays. Tap **CONFIRM**.

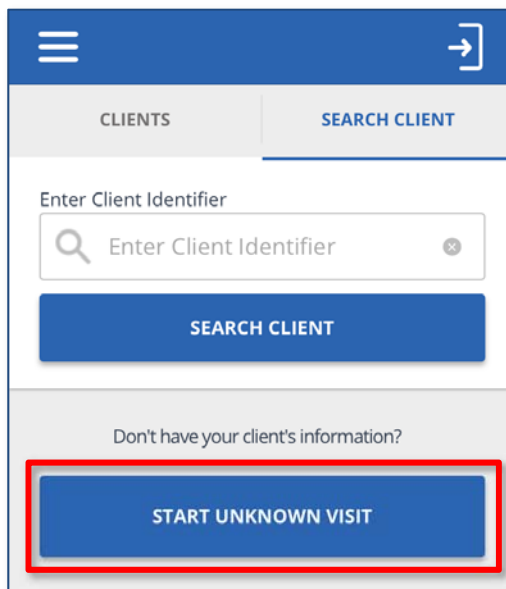


Starting and Completing an Unknown Visit

If the Medicaid ID entered is not found when trying to start a visit, the employee can start an unknown visit. Unknown visits appear in Sandata EVV as an unknown *Client Visit* exception and must be fixed in *Visit Maintenance*.

When the employee is unable to select the client by entering the Medicaid ID, he or she will:

1. Log in to SMC.
2. Tap **START UNKNOWN VISIT**.



The screenshot shows the Sandata EVV SMC interface. At the top, there is a blue header with a menu icon on the left and a back icon on the right. Below the header, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. The 'SEARCH CLIENT' tab is active. Underneath, there is a search input field labeled 'Enter Client Identifier' with a magnifying glass icon on the left and a close icon on the right. Below the input field is a blue button labeled 'SEARCH CLIENT'. At the bottom of the screen, there is a section with the text 'Don't have your client's information?' and a blue button labeled 'START UNKNOWN VISIT' which is highlighted with a red rectangular box.

3. Enter the following information for the client and tap **CONTINUE** (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
 - **FIRST NAME** (Required)
 - **LAST NAME** (Required)
 - **MEDICAID ID #** (Optional – if available)

START UNKNOWN VISIT

Please enter the client's name before continuing

FIRST NAME *

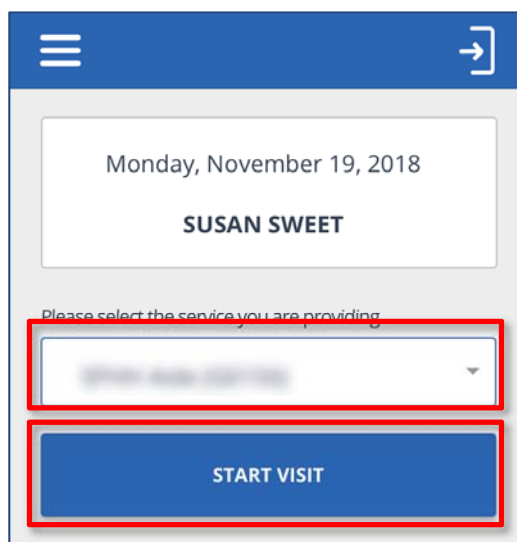
LAST NAME *

MEDICAID ID #

*denotes required field

CANCEL **CONTINUE**

4. Select the *Service* from the drop-down list and tap **START VISIT**.



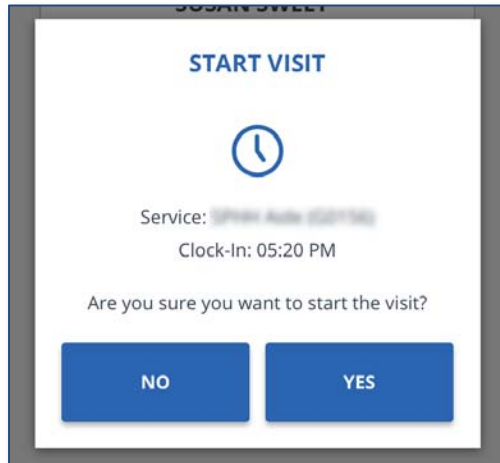
Monday, November 19, 2018

SUSAN SWEET

Please select the service you are providing

START VISIT

5. Tap **YES** to confirm the start of the visit. A pop-up displays asking the employee to confirm the start of visit.



The visit is completed following the same process used when completing a visit for a known client.

6. Log out of the SMC app.

Using SMC in an Offline Mode

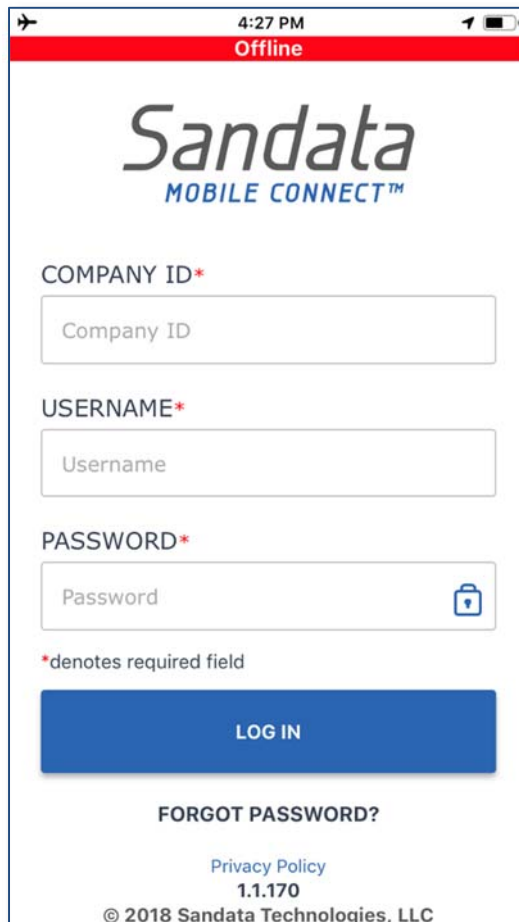
When an employee provides care in an area that does not have cellular or wi-fi service, the employee can still use Sandata Mobile Connect in an offline mode to check-in/check-out for their scheduled visit or start an Unknown Visit.



A red banner appears across the top of the screen when SMC is running in offline mode.

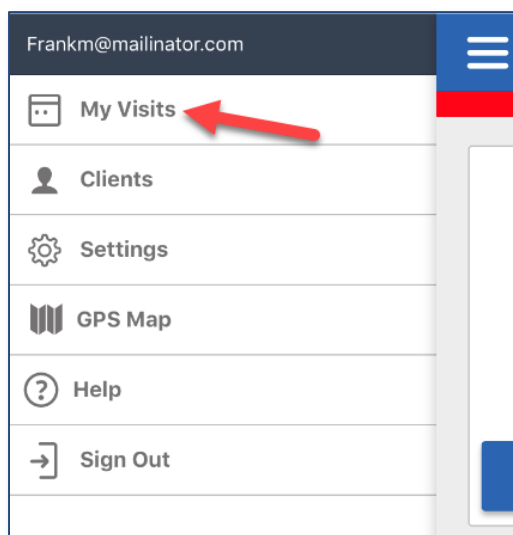
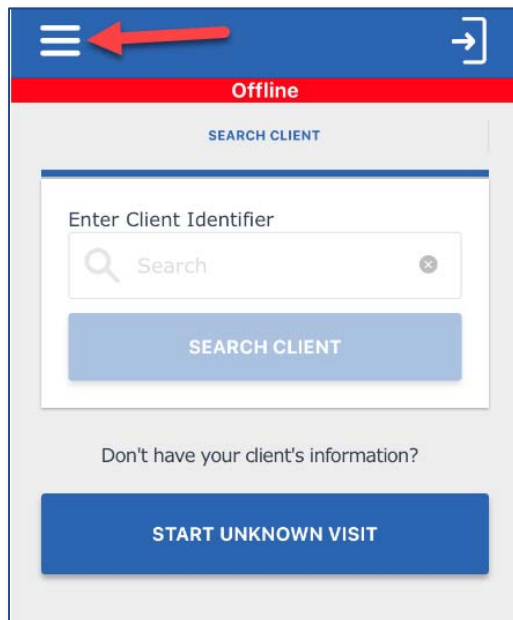
Logging in to SMC Offline

When opening SMC without a cellular or wi-fi connection, the login screen shows in red at the top of the screen that the app is Offline.



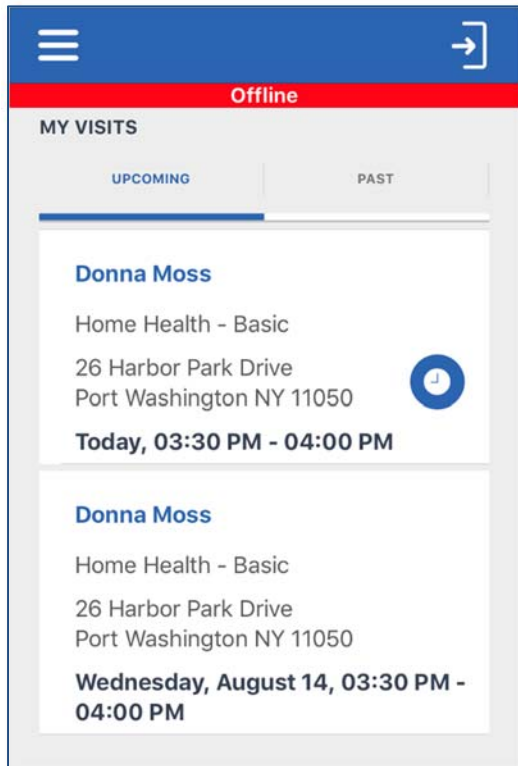
Starting a Scheduled Visit Offline

1. Tap on the menu icon in the upper-left corner of the home screen and tap **My Visits** to start a scheduled visit.



The scheduled visits displayed are as of the last time the employee logged in to SMC in a connected mode. Changes to schedules or new schedules for the employee are not available when SMC is offline.

2. Tap on the schedule to check-in and start the visit.



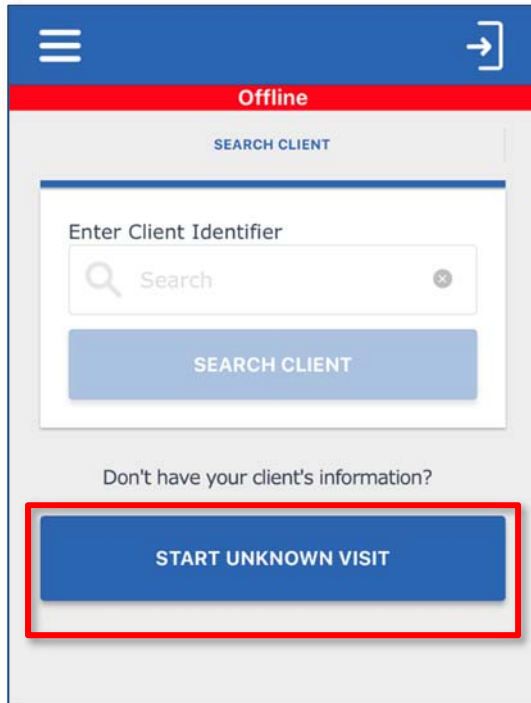
The visit is started and completed following the same process as a scheduled visit in an online connected mode.



Note that start and end times captured for a visit while SMC is in Offline mode are encrypted and stored on the device. The times are automatically sent to Sandata EVV the next time the employee signs in to SMC in an online/connected mode.

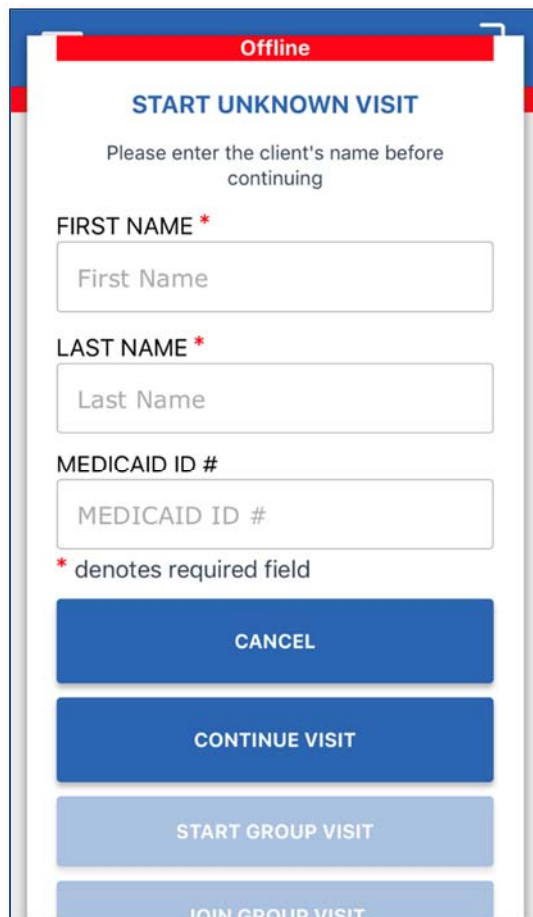
Starting an Unknown Visit Offline

1. Tap **START UNKNOWN VISIT**.



The screenshot shows a mobile application interface. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. Below the header is a red bar with the word "Offline" in white. Underneath is a grey bar with the text "SEARCH CLIENT". The main content area is white and contains a search form. The form has a title "Enter Client Identifier" and a search input field with a magnifying glass icon and a clear button. Below the input field is a blue button labeled "SEARCH CLIENT". Below the search form is the text "Don't have your client's information?". At the bottom of the screen is a large blue button labeled "START UNKNOWN VISIT", which is highlighted with a red rectangular border.

2. Enter the following information for the client and tap **CONTINUE** (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
 - **FIRST NAME** (Required)
 - **LAST NAME** (Required)
 - **MEDICAID ID #** (Optional – if available)



- The visit is started and completed following the same process as a Unknown Visit in an online connected mode.



Note that start and end times captured for a visit while SMC is in Offline mode are encrypted and stored on the device. The times are automatically sent to Sandata EVV the next time the employee signs in to SMC in an online/connected mode.

TVV

TVV is available as an alternative to the SMC call-in/call-out process. TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, because the device has not yet been delivered, etc.).



An employee can start a visit using SMC and complete the visit using TVV and vice versa, if required.



When using TVV, employees can call-in/call-out from any phone associated to the client (i.e. client's home landline phone or cell phone).


Call Reference Guide SAMPLE


Calling Instructions **STX«ACCOUNT»**

- If you made a mistake entering Tasks, press "00", the system will confirm by saying: "Starting Over, Enter number of tasks". Enter all task ID's again. **Important: "00" can neither be used when selecting to enter a single task nor after the last task entry of a multi-task visit. Contact your agency to correct any errors/exceptions.**


Santrax will say: "You entered (NUMBER) task(s). To record the client's voice please press "1" and hand the phone to the client, or press "2" if the client is unable to participate


15.  Press '1' to record the client's voice.
OR
 Press '2' if the client is unable to participate then skip to step 20.


16.  Hand the phone to the client and the client will be asked to state their first and last name and today's date.
Santrax will say: "Please say your first, last name and today's date."

17.  The client should say their first, last name and today's date.
NOTE:
The system may skip the following prompts. If the prompt is skipped, please continue with the next prompt, or hang up if done.


Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press one to confirm, two to deny, 3 to replay."


18.  The client should press the appropriate option.
Santrax will say: "The service performed was (SERVICE). Press one to confirm, two to deny."

19.  The client should press the appropriate option.
Santrax will say: "Please enter second client ID or hang up if done."

20.  Enter the ID for the second client receiving service.

21. Follow the prompts to enter client IDs until all clients that share this call time have been entered.
NOTE: If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say: "Thank you, bye."

22.  Hang up.


















Call Reference Guide:
«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:
 Select Language
 Select Service
 Task
 Client Verification - Visit
 Call In/Out Prompting
 Multi - Client
 Client Verification - Recording
 Client Verification - Service

Calling Instructions	STX«ACCOUNT»	Calling Instructions	STX«ACCOUNT»
<p>Calling In: When arriving at the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> Your Santrax ID. <p>Remember: When speaking to Santrax on any toll-free line, speak in English, slowly and clearly one digit at a time (1075 = one, zero, seven, five).</p> <ol style="list-style-type: none">  Dial any of the toll-free numbers assigned to your agency. <i>If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.</i> The Santrax system will say: "For English, please press one (1). For Spanish, please press two (2). For Somali, please press three (3). For Chinese Mandarin, please press four (4). For Arabic, please press five (5). For Russian, please press six (6). <i>These prompts are heard in their respective languages.</i>  Press the number that corresponds to the language you wish to hear. <i>All prompts for the remainder of the call will be heard in that language.</i> Santrax will say: "Welcome, please enter your Santrax ID."  Press the numbers of your Santrax ID on the touch tone phone. Santrax will say: "Please select "1" to call in or "2" to call out."  Press the one (1) key to "Call In". Santrax will say: "Received at [TIME] Please enter first client ID or hang up."  Enter the ID for the first client receiving service. Santrax will say: "Please enter second client ID or hang up if done."  Enter the ID for the second client receiving service.  Follow the prompts to enter client IDs until all clients that share this call time have been entered. NOTE: <i>If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say: "Thank you, bye."</i>  Hang up. 	<p>Calling Out: When leaving the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> Your Santrax ID. The Service ID. The Client is available to verify the visit. <ol style="list-style-type: none">  Follow steps 1 – 3, and then continue. Santrax will say: "Please select "1" to call in or "2" to call out."  Press the two (2) key to "Call Out". Santrax will say: "Received at [TIME]. Please enter first client ID or hang up if done."  Enter the ID for the first client receiving service. Santrax will say: "Please enter the Service ID."  Press the Service ID Number you performed. <i>Refer to your agency's Service list.</i> Santrax will say: "You entered (SERVICE). Please press "1" to accept, "2" to retry." <i>Once the service has been entered, the system will repeat it back to you. If the service is incorrect, press "2" to re-enter the service. When the service is correct, press "1" to accept.</i>  Press the one (1) key to accept, or press the two (2) key to retry. Santrax will say: "Enter number of tasks."  Press the total number of tasks performed for the client. Santrax will say: "Entered task ID."  Press the Task Number you preformed. NOTES: <ul style="list-style-type: none"> Refer to your agency's task list. If you performed more than one task, wait for the system to confirm the task and then enter the next task number until you have entered all tasks performed during the visit. 		



Santrax TVV prompts callers up to three times to input information.

If a caller receives a busy signal, try the alternate number.

Two or more calls made within one minute of another will make one of the calls extraneous.



For each prompt, Santrax allows a caller three attempts to enter the information correctly. After three unsuccessful attempts, the call is terminated. If the call is terminated, the caregiver should call and inform the agency. The agency will fix the call in Visit Maintenance.

Call Process

Call-In	
1	Dial the toll-free number. <i>Santrax will say the available language prompts. *Each prompt will be heard in its respective language.</i>
2	Press the number that corresponds to the desired language. <i>Santrax will say: "Welcome, please enter your Santrax ID."</i>
3	Press the numbers of your Santrax ID on the touch tone phone. <i>Santrax will say: "Press 1 to call-in or 2 to call-out."</i>
4	Press the one (1) key to "call-in." ** <i>Santrax will say: "Received at [Time]. Thank you, bye." (if the phone number the call is coming from is only associated to one (1) client, otherwise Santrax will give the time then prompt for a client ID)</i> ** When a phone is associated to more than one client in Sandata EVV, you will be prompted to provide the Client ID to identify the client for whom care is being provided. <i>Santrax will say: "Please enter first client ID or hang up if done."</i> Enter the client ID for the client receiving care.
5	Hang up.

Santrax IDs and Client IDs



- The Santrax ID is a unique system-generated number identifier for the employee and is used by the employee to identify themselves on a TVV call.
- The Client ID is a unique system-generated number identifier for the client, used by the employee on a TVV call to identify the client.

Call-Out	
1	Dial the toll-free number. <i>Santrax will say the available language prompts. *Each prompt will be heard in its respective language.</i>
2	Press the number that corresponds to the desired language. <i>Santrax will say: "Welcome, please enter your Santrax ID."</i>
3	Press the numbers of your Santrax ID on the touch tone phone. <i>Santrax will say: "Press 1 to call-in or 2 to call-out."</i>
4	Press the two (2) key to "call-out." <i>Santrax will say: "Received at [Time]." (if the phone number the call is coming from is only associated to one (1) client, otherwise Santrax will give the time then prompt for a client ID)</i> <i>Santrax will say: "Please enter the Service ID."</i>
5	Press the service ID performed (Service IDs and Tasks are listed on a separate sheet) <i>Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."</i>
6	Please press 1 to accept, 2 to re-enter <i>If prompted for the Client ID, enter the Client's ID number.</i>
7	<i>Santrax will say: "Thank you, bye."</i> Hang up.

Visit Scenarios (SMC and Telephony)

Multiple clients in the same home

- If a provider cares for more than one client in the same home (e.g. husband and wife), but not at the same time:
 - SMC – the employee calls in and out for the client receiving care at that time.
 - Telephony – the employee calls in and out and enters the Client ID of the client receiving care at that time.
- If both clients in the home are receiving care, back to back:
 - SMC – the employee calls in and out for each client receiving care.
 - Telephony – the employee calls in and out for each client receiving care. The employee enters the Client ID for each client’s calls. A total of four calls are made for this type of visit.



The Client ID can be found by looking up the client’s record in the Sandata EVV *Data Entry* module or running an *Active Clients Report* in the *Reports* module.

Providing multiple services for a client during a single visit

- If an employee provides care for a single client under multiple services during a visit:
 - SMC — the employee calls in and out for each visit and service. There will be a total of four calls made for the entire visit.
 - Telephony — the employee calls in and out for each visit and service. There will be a total of four calls made for the entire visit.



After calling out for the first service, wait one minute before calling in to start the visit for the second service. If it's within the same minute, the call is treated as an extraneous call for the end-call of the first visit.

Provider providing care multiple times for a single client in one day

- If an employee cares for a single client multiple times in one day:
 - SMC – the employee calls in and out for each visit, capturing the visit hours and service performed.
 - Telephony – the employee calls in and out for each visit, capturing the visit hours and service performed.

Visit that starts and/or ends away from the client's home

- If an employee delivers care to the client outside the home, or picks up/drops off the client outside the home:
 - SMC – the employee calls in and out from the client's location outside the home.
 - Telephony – the employee calls in and out. Manual adjustments will be made in *Visit Maintenance*.



If neither SMC nor TVV are available, the agency provider enters the visit manually in *Visit Maintenance*.

Multiple providers caring for a single client at the same time

- If multiple providers deliver care to a single client at the same time:
 - SMC – each provider calls in and out for their visit, capturing the visit hours and service performed.
 - Telephony – each provider calls in and out for their visit, capturing the visit hours and service performed.

Overnight Visits

- If an employee provides care to a client that starts before midnight one day and ends after midnight the following day:
 - SMC – the employee will call in upon arriving and call out when leaving.
 - Telephony – the employee will call in upon arriving and call out when leaving.

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8 Visit Maintenance

Module Time

75 minutes

This lesson explains how to use the Sandata EVV *Dashboard* to monitor current day visits to view exceptions. The lesson also reviews the *Visit Maintenance* module, explaining how to navigate the screens, understand the information presented on the screen for selected visits, and how to resolve exceptions that may be linked with a visit.

Module Objectives

After completing this lesson, you will be able to:

- use the Sandata EVV *Dashboard* to monitor current day visit exceptions;
- search and review visit exceptions; and
- resolve visit exceptions.

Key Terminology

Term/Acronym	Definition
Client	A person who receives services through the Medicaid program.
Dashboard	Real-time status of the current day's visit exceptions.
Employee	A person who is employed by an agency provider to provide care to one or more clients
Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community-based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged.

Introduction

The Sandata EVV *Dashboard* and *Visit Maintenance* module is designed to give users the ability to review, modify and correct Sandata EVV visits. It allows agency personnel with appropriate access the ability to monitor the current day's visit activity in real-time. It allows visits to be updated to ensure that all necessary information is included and any exceptions are corrected or acknowledged.



Visit maintenance should not be done while a visit is in process.

A visit includes an employee, a client, a service, GPS location for SMC or the telephone number for TVV, the client verification information, as well as call-in and call-out times (date and time) from a client's location.

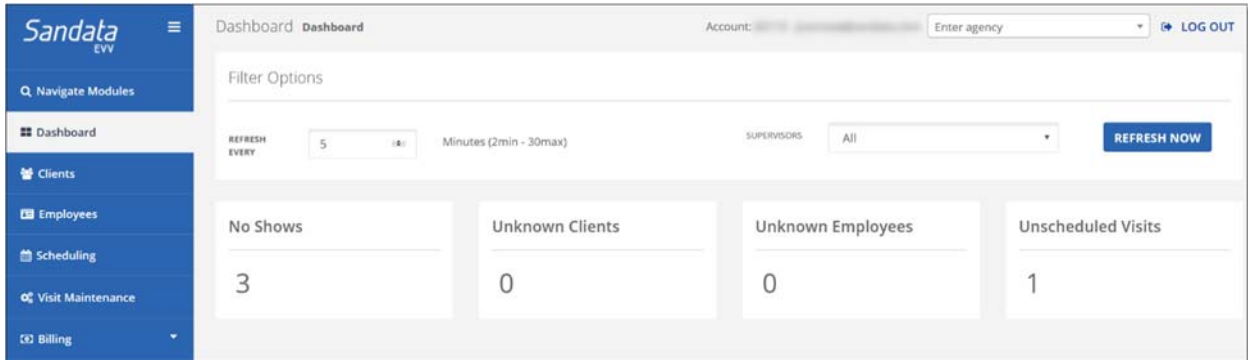
As call-in/call-out times are received by Sandata EVV, exceptions are applied based on the business rules for the specific exception. For example, 'Visit without an In Call' exception would be applied if an out call is received in the absence of an in call. Exceptions are grouped by those that must be fixed and those that must be acknowledged (e.g. GPS Distance Exception). *Visit Maintenance* allows you to correct/acknowledge the exceptions on a visit so that it can be matched to the claim submitted for the visit.



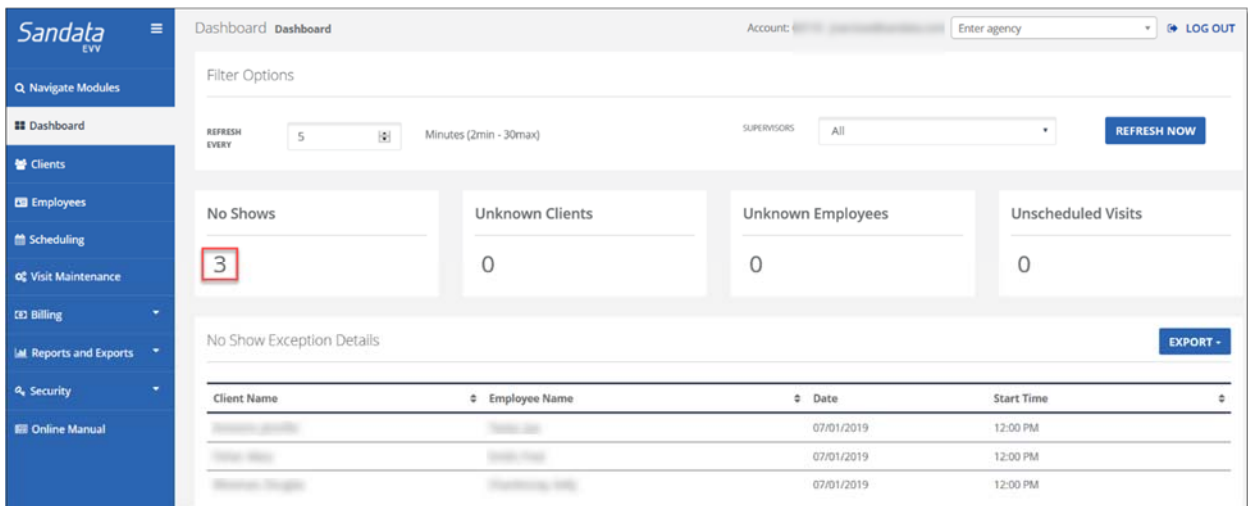
Sandata EVV is not used for billing and does not guarantee payment for a visit.

Sandata EVV Dashboard

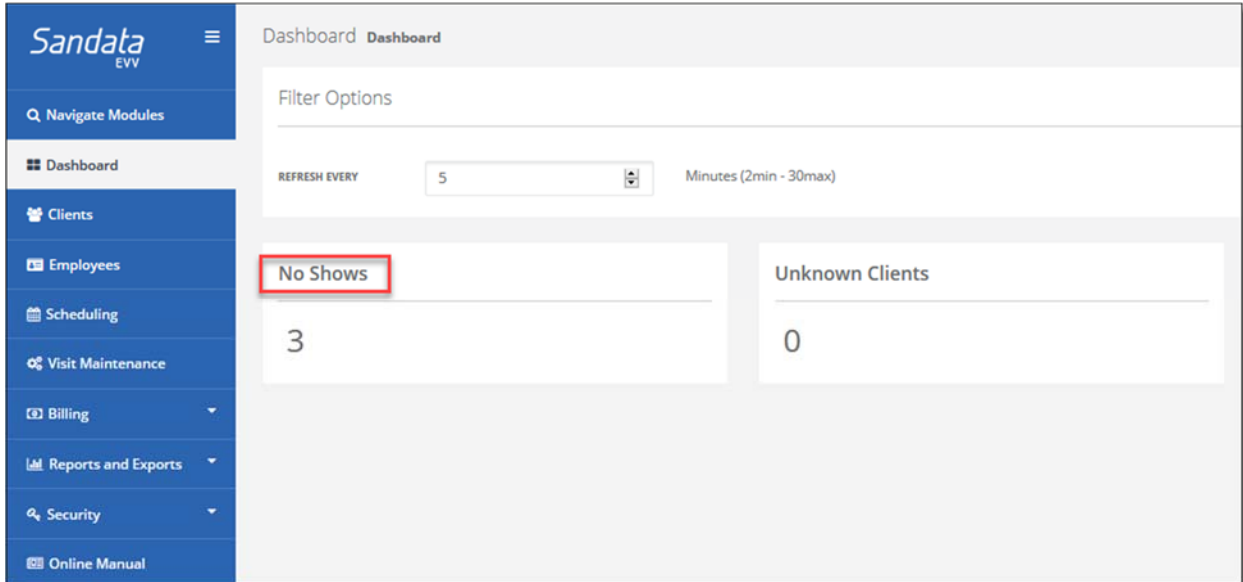
The Sandata EVV *Dashboard* monitors current day’s visits to identify four specific exceptions. These exceptions fall into four categories— **No Shows**, **Unknown Clients**, **Unknown Employees**, and **Unscheduled Visits**. The data defaults to refresh every five minutes but can be changed to refresh between 2 – 30 minutes. All exception types can be viewed in *Visit Maintenance*.



Click the exception category total to display a listing of the visit exception details for that specific exception.



Click the exception category name to link to the *Visit Maintenance* module to view and edit the visits for that exception.



The screenshot shows the Sandata EVV Dashboard. On the left is a navigation menu with options like Clients, Employees, Scheduling, Visit Maintenance, Billing, Reports and Exports, Security, and Online Manual. The main area is titled 'Dashboard Dashboard' and contains a 'Filter Options' section with a 'REFRESH EVERY' dropdown set to '5' minutes. Below this are two summary cards: 'No Shows' with a value of '3' (highlighted with a red box) and 'Unknown Clients' with a value of '0'.

Visit Maintenance | Visit Maintenance | Manage Visits

Account: 001101-jharisse@sandata.com | Enter agency

Select a Visit

DATE RANGE MM/DD/YYYY: 07/01/2019 to 07/01/2019

CLIENT: Enter Client

EMPLOYEE: Enter Employee

CATEGORY: Select Category

PAYER: Select Payer

VISIT STATUS: Select Visit Status

CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: Exception Types

EXCEPTION TYPES: No Show Exception

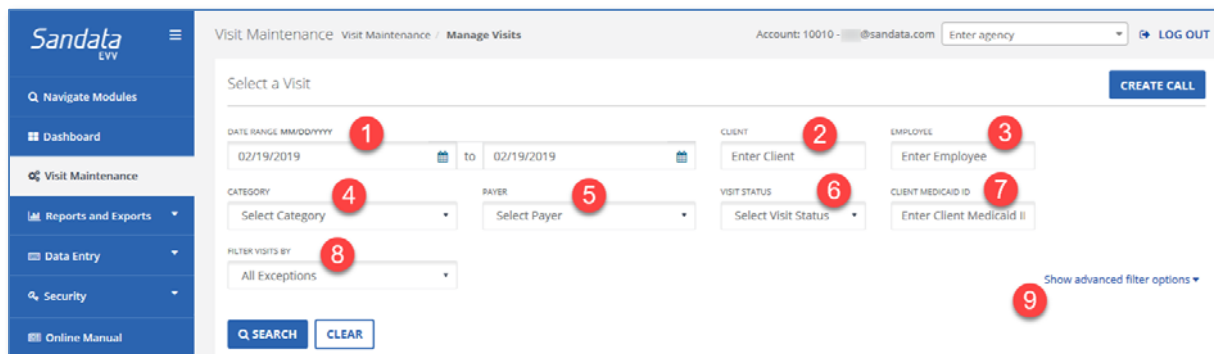
SEARCH: [SEARCH] [CLEAR]

EXPORT: [EXPORT -]

Show: 50 per page

Client Name	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	Pay:Sch	Bill Hours	Visit Status
Anizson, Jennifer	Tester, Joe	Personal Care Services	07/01/2019	12:00 PM	01:00 PM	01:00	●						[--]	■	[--]	Incomplete
Fisher, Mary	Smith, Fred	Personal Care Services	07/01/2019	12:00 PM	05:00 PM	05:00	●						[--]	■	[--]	Incomplete
Wineman, Douglas	Chardonnay, Kelly	Homemaker	07/01/2019	12:00 PM	05:00 PM	05:00	●						[--]	■	[--]	Incomplete
						Total										
						11:00										

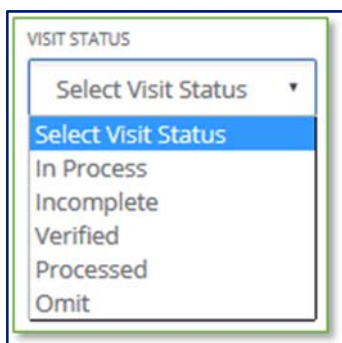
Visit Maintenance – Main Screen



Search Filters

In *Visit Maintenance*, search filters are used to set up parameters to find visits to review and are located on the top half of the *Visit Maintenance* screen. The search results include all data that falls within the specified parameters.

1. **DATE RANGE:** The date fields default to the current date and can be changed by clicking in the date field and typing the date or clicking on the calendar icon to select a date using the pop-up calendar.
2. **CLIENT:** Enter all or part of client’s last name to filter the visit data for that client.
3. **EMPLOYEE:** Enter all or part of employee’s last name to filter the visit data for that employee.
4. **CATEGORY:**
5. **PAYER:** Displays the list of payers when multiple payers exist.
6. **VISIT STATUS:** This filter allows a user to filter the visits by their status. The options include:

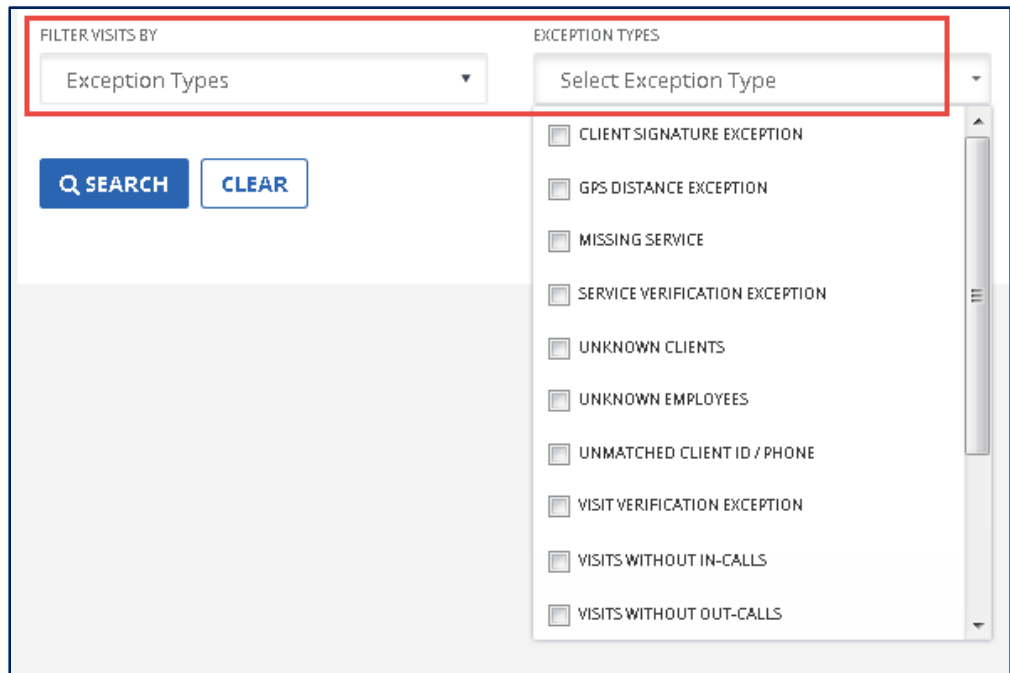


Status	Description
In Process	A visit has started and not yet completed
Incomplete	A visit has exceeded a 24-hr. period and is still missing a call-in/call-out
Verified	A visit that does not contain any exceptions
Processed	A visit that does not contain any exceptions and has been returned to the claims validation engine at least once
Omit	A visit that is marked ‘Do Not Bill’

7. **CLIENT MEDICAID ID:** Enter the client’s Medicaid ID.

8. **FILTER VISITS BY:**

- **All Exceptions:** This default setting displays all visits containing one or more exceptions within a specified time period.
- **Exception Types:** This option selects visits based on the exceptions which apply to the visit. When selected, an additional field appears prompting the user to choose the specific exception type(s) from the additional drop-down field.




Exception	Description
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the SMC call-in or Telephony call-out.

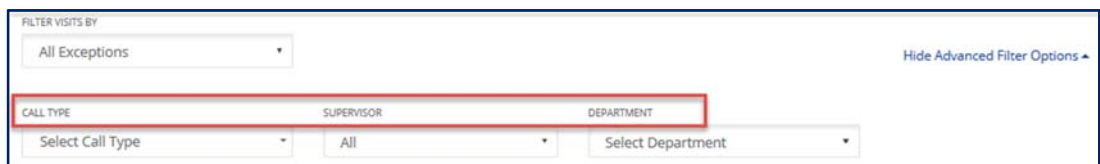
Exception	Description
UNAUTHORIZED SERVICE	This exception occurs when an employee selects a service for a visit that does not match to the service the client receives. The exception must be fixed in the Visit Details screen.
NO SHOW	Occurs when Sandata EVV has not received a clock-in from the scheduled caregiver for a visit and the start time of visit has already passed.
UNKNOWN CLIENTS	Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client.
UNKNOWN EMPLOYEES	Identifies when the Santrax ID entered during a Telephony call does not match to any known employee.
UNMATCHED CLIENT PHONE/ID	Identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client.
VISIT WITHOUT IN-CALLS	Identifies a visit which does not have a call-in.
VISIT WITHOUT OUT-CALLS	Identifies a visit which does not have a call-out or when a scheduled visit does not have any call times associated.

- **All Visits:** Sandata EVV will show all visits (including those with exceptions) in the search results for a specified time period.

9. **Show Advanced Filter Options:** Displays additional filters such as **Call Type**, **Supervisor** and **Department**.



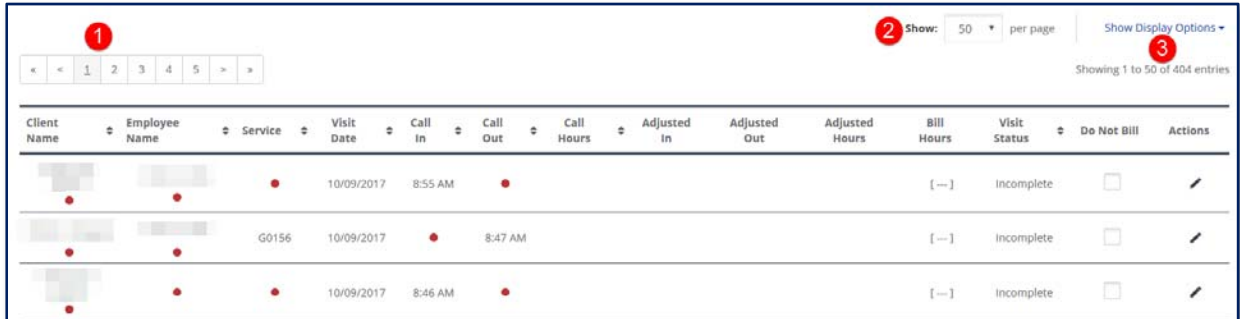
The screenshot shows a search filter interface. At the top, there is a dropdown menu labeled 'FILTER VISITS BY' with 'All Exceptions' selected. To the right of this menu is a button labeled 'Show Advanced Filter Options' which is highlighted with a red rectangular box. Below the dropdown menu are two buttons: 'SEARCH' and 'CLEAR'.



The screenshot shows the search filter interface with advanced filters expanded. The 'Show Advanced Filter Options' button is now 'Hide Advanced Filter Options'. Below this, three filter dropdowns are visible: 'CALL TYPE' (with 'Select Call Type' selected), 'SUPERVISOR' (with 'All' selected), and 'DEPARTMENT' (with 'Select Department' selected). A red rectangular box highlights the top row of these three filter dropdowns.

- **Call Type:** Filter visits to show only **MVV** or **Manual** calls
- **Supervisor:** This filter is available if clients are grouped by supervisor/coordinators
- **Department:** This filter is available if employees are by departments Search Results – Understanding the Visit Grid

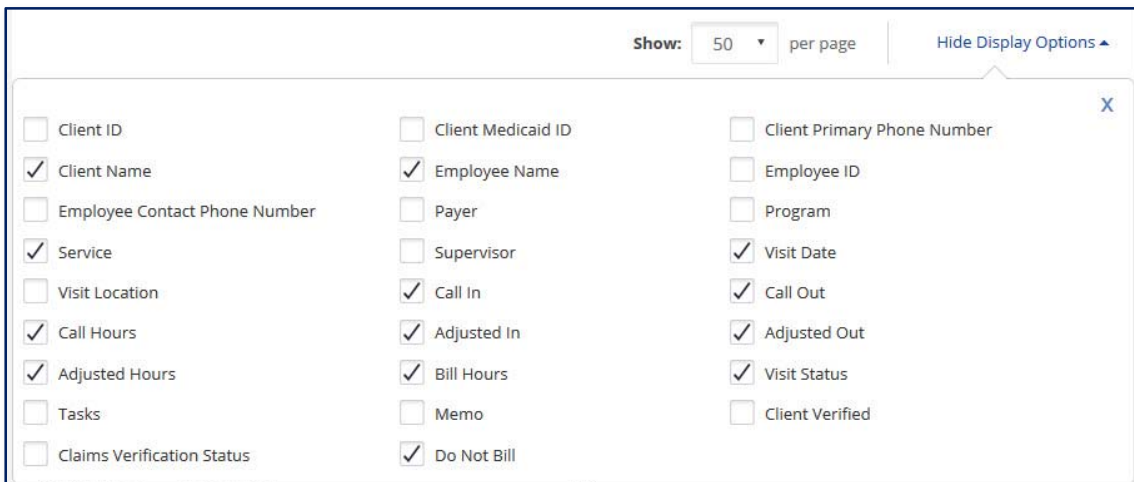
When the filters are applied and a search is performed, the results are displayed in the visit grid at the bottom portion of the screen.



Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
[Redacted]	[Redacted]	[Redacted]	10/09/2017	8:55 AM	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Incomplete	<input type="checkbox"/>	[Pencil]
[Redacted]	[Redacted]	G0156	10/09/2017	[Redacted]	8:47 AM	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Incomplete	<input type="checkbox"/>	[Pencil]
[Redacted]	[Redacted]	[Redacted]	10/09/2017	8:46 AM	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Incomplete	<input type="checkbox"/>	[Pencil]

The top of the visit grid displays the following options:

1. Pagination arrows are used to move forward/backward a page, jump to a specific page or first/last page.
2. Lines per page setting to adjust the number of lines per page (default = 50)
3. A **Show Display Options** link allows the user to select additional data elements to display in the visit grid.



Client ID
 Client Name
 Employee Contact Phone Number
 Service
 Visit Location
 Call Hours
 Adjusted Hours
 Tasks
 Claims Verification Status

Client Medicaid ID
 Employee Name
 Payer
 Supervisor
 Call In
 Adjusted In
 Bill Hours
 Memo
 Do Not Bill

Client Primary Phone Number
 Employee ID
 Program
 Visit Date
 Call Out
 Adjusted Out
 Visit Status
 Client Verified



Any additional data element selected from the **Display Options** link is only available during the current session. Upon logging out and logging back in to Sandata EVV, the visit grid returns to the default display.


The data within the visit grid can be sorted by clicking on any of the following column headers:

- **Client Name**
- **Employee Name**
- **Service**
- **Visit Date**
- **Call-In**
- **Call-Out**
- **Call-Hours**
- **Visit Status**



Hovering the mouse over an exception indicator displays a tool tip for that exception detail.

Reviewing a Visit

To view the details of a visit, either click on the visit line or click **Edit**  to the right of the line to display the *Visit Details* screen.



When clicking on a data element on the visit line, the *Visit Details* screen opens directly to that section of the visit.

The top of *Visit Details* screen contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME** and **EMPLOYEE ID** information. There are also tabs on the left which display various details of the visit.

Visit Details X				
CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Carter, John	59647013	999888555101	Young, Charles	

- **GENERAL:** contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, EMPLOYEE ID, VISIT START DATE, VISIT END DATE, VISIT TIME ZONE, VISIT STATUS, CALL IN, CALL OUT, CALL HOURS, DO NOT BILL, ADJUSTED TIMES, BILL HOURS, PAY HOURS, AGENCY ID, AGENCY NAME, PAYER, PROGRAM, SERVICE, BILL CODE**, client verification

results (**CLIENT VERIFIED TIME, CLIENT VERIFIED SERVICE**), **CLIENT SIGNATURE** (signature or voice recording) and **VISIT SOURCE**.

Visit Details
✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Carter, John	59647013	999888555101	Young, Charles	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

VISIT END DATE

VISIT TIME ZONE

VISIT STATUS

CALL IN

CALL OUT

CALL HOURS

DO NOT BILL

ADJUSTED IN HHMM AM/PM

ADJUSTED OUT HHMM AM/PM

BILL HOURS

PAY HOURS

AGENCY ID

AGENCY NAME

PAYER

PROGRAM

SERVICE

BILL CODE

CLIENT VERIFIED TIME

CLIENT VERIFIED SERVICE

CLIENT SIGNATURE

VISIT SOURCE

CANCEL

- **CLIENT:** This screen displays the client’s details such as **ADDRESS, PHONE NUMBER** and **LANGUAGE PREFERENCE.**

GENERAL	ADDRESS LINE 1 Marshall Street	ADDRESS LINE 2 None	CITY Elmont	
CLIENT	STATE NY	ZIP CODE 11003-0000	PRIMARY PHONE # [REDACTED]	TIME ZONE US/Eastern
EMPLOYEE	GENDER Male	LANGUAGE PREFERENCE Russian	SUPERVISOR None	
CALL LOG	Find Client			
EXCEPTIONS	LAST NAME Enter Last Name	FIRST NAME Enter First Name	CLIENT ID # Enter Client ID # <input type="button" value="Q"/>	
GPS				
MEMO				

The screen also includes an option to change the client for the visit, in instances when the client is unknown or was entered incorrectly.

GPS	Find Client					
MEMO	LAST NAME c	FIRST NAME Enter First Name	CLIENT ID # Enter Client ID # <input type="button" value="Q"/>			
CLAIMS	Actions	Last Name	First Name	Client ID #	Primary Phone #	Medicaid ID
HISTORY	<input type="radio"/>	Callaghan	Alexandra	13895412	5164844400	998877665544
	<input type="radio"/>	Care	Kelly	49025929	[REDACTED]	432432432432
	<input type="radio"/>	Carter	John	59647013	[REDACTED]	999888555101
	<input type="radio"/>	Christopher	Stephen	97173124	[REDACTED]	122057122057
	Showing 1 to 4 of 4 entries					
	<input type="button" value="←"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value="→"/>					
	REASON CODE *	RESOLUTION CODE	REASON NOTE			
	Select Reason Co ▾	Select Resolution ▾	Reason Note			<input type="button" value="SAVE"/>

- **EMPLOYEE:** This screen displays the employee details such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS and PHONE.**

GENERAL	EMPLOYEE EMAIL dmoss@mailinator.com	SANTRAX ID 000046258		
CLIENT	ADDRESS None	ADDRESS LINE 2 None	CITY None	STATE None
EMPLOYEE	ZIP CODE None	DISCIPLINE None	PHONE None	
CALL LOG				
MERGE CALLS				

The screen also includes an option to change the employee for the visit, in instances when an incorrect Santrax ID was entered for the visit.

EXCEPTIONS	Find Employee				
GPS	LAST NAME r	FIRST NAME First Name	EMPLOYEE ID # Employee ID #	DISCIPLINE Select Discipline ▾	🔍
MEMO	Actions	Last Name ⇅	First Name ⇅	Employee ID ⇅	Santrax ID ⇅ Discipline ⇅
CLAIMS	<input type="radio"/>	Renoit	Vivian	9990043211	000735512 HHA
HISTORY	<input checked="" type="radio"/>	Richardson	Jamie		000697339
	<input type="radio"/>	Rose	Robert	6667778884	000909334 LPN
	<input type="radio"/>	Ross	Judith		000246743
	<input type="radio"/>	Ross	Doug		000621693
	Showing 1 to 5 of 7 entries				
	<input type="button" value="«"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value=">"/> <input type="button" value="»"/>				
	REASON CODE * Select Reason Co ▾	RESOLUTION CODE Select Resolution ▾	REASON NOTE Reason Note		SAVE

- **CALL LOG:** This screen shows the details of the call-in/call-out times and the type of call (Mobile, Telephony, Manual). If a visit is missing a call, a call can be manually added from this screen.

GENERAL	CALL IN			CLIENT ID#
CLIENT	CALL DATE	CALL TIME	CALL TYPE	SERVICE
EMPLOYEE	08/14/2017	3:13 PM	EW (telephony)	N/A
CALL LOG	USER	ORIGINATING PHONE #	CALL SOURCE	
MERGE CALLS	000046258		SANDATA	
EXCEPTIONS	CALL OUT			CLIENT ID# 0059647013
GPS	CALL DATE	CALL TIME	CALL TYPE	SERVICE
	08/14/2017	4:06 PM	EW (telephony)	G0156
	USER	ORIGINATING PHONE #	CALL SOURCE	
	000046258		SANDATA	

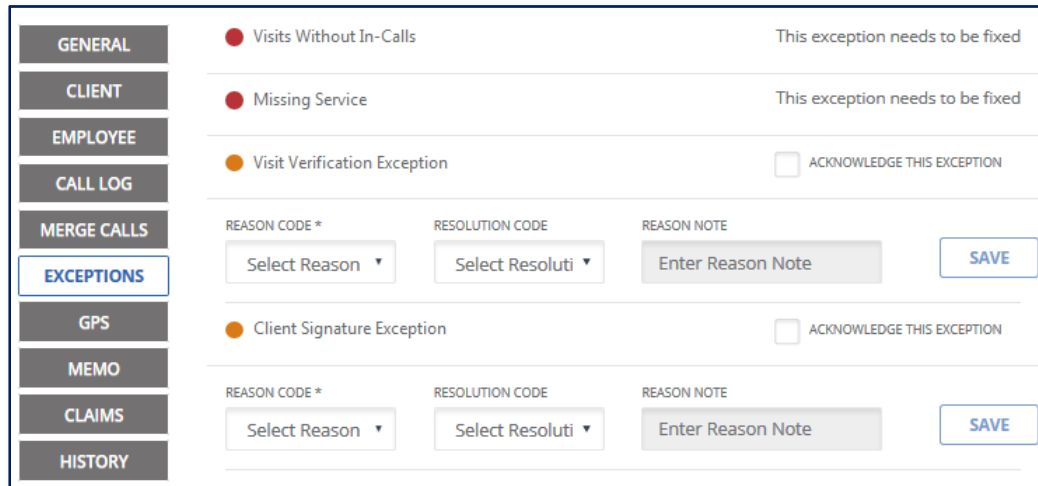
- **MERGE CALLS:** This screen shows a list of available calls that may be merged to the visit when the visit is missing a call time. Calls can be merged if there are within time proximity and not associated with any other visit.

GENERAL	Below is a list of all calls that are close to the scheduled time.				
CLIENT	PHONE #	CALL TIME	CALL DATE	CLIENT NAME	EMPLOYEE NAME
EMPLOYEE	<input type="radio"/>		2:02 PM	8/14/2017	Carter, John 001-06-6825
CALL LOG	<input type="radio"/>		2:47 PM	8/14/2017	Carter, John Young, Charles
MERGE CALLS	<input type="radio"/>		3:38 PM	8/14/2017	Carter, John 000-44-6258
EXCEPTIONS	Showing 1 to 3 of 3 entries				
GPS	<input type="button" value="←"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value="→"/>				
MEMO					

- **TASKS:** This screen shows the tasks that were entered by the employee during the visit. A user with the appropriate permissions can add additional tasks to the visit or delete existing tasks if needed.

GENERAL	Task ID ^ Description ⇅ Reading Manually Added Status Actions					
CLIENT	0010	Bathing		Yes	Completed	
EMPLOYEE	Showing 1 to 1 of 1 entries					
CALL LOG	<input type="button" value="←"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value="→"/>					
MERGE CALLS	Add Task					
TASKS	TASK * <input type="text" value="Select Task"/> READING <input type="text"/>					
EXCEPTIONS	<input type="button" value="ADD"/>					
GPS						
MEMO						
CLAIMS						

- **EXCEPTIONS:** This screen lists all the visit exceptions for the visit, along with the available option to resolve each exception.

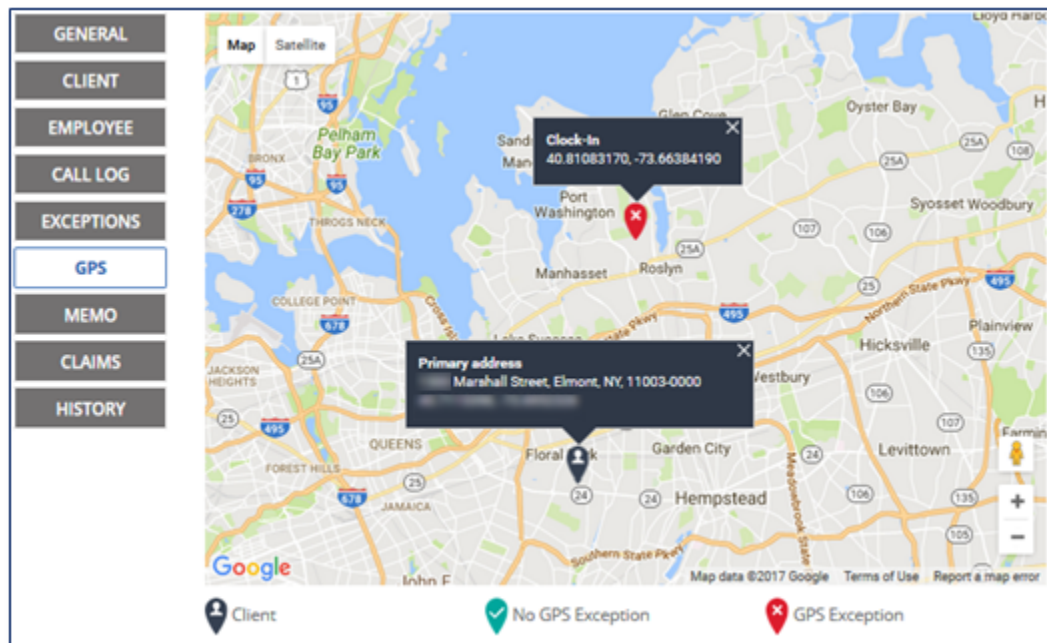


The screenshot shows a sidebar menu on the left with options: GENERAL, CLIENT, EMPLOYEE, CALL LOG, MERGE CALLS, EXCEPTIONS (highlighted), GPS, MEMO, CLAIMS, and HISTORY. The main content area displays a list of exceptions:

- Visits Without In-Calls** (Red dot): This exception needs to be fixed.
- Missing Service** (Red dot): This exception needs to be fixed.
- Visit Verification Exception** (Orange dot): Includes a checkbox for "ACKNOWLEDGE THIS EXCEPTION".
- Client Signature Exception** (Orange dot): Includes a checkbox for "ACKNOWLEDGE THIS EXCEPTION".

Below each exception type, there are input fields for "REASON CODE *", "RESOLUTION CODE", and "REASON NOTE", along with a "SAVE" button.

- **GPS:** This screen shows the location of the SMC call-in/call-out times relative to the client's home.



- **MEMO:** This screen allows the user to make a note and display notes previously entered related to the visit. It also includes a *Visit Note* screen which displays notes entered into SMC during call-out.



This information should not be used to fulfill documentation requirement.

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

MEMO

Memo

1024 characters remaining.

VISIT NOTE

Visit Note

- **CLAIMS:** This screen shows the batch, transaction and date/time each time the visit was returned to the adjudication system.

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

BATCH ID	TRANSACTION ID	DATE RETURNED FOR CLAIMS PROCESSING	INTERNAL CONTROL NUMBER	DETAIL LINE NUMBER	MODIFIER	BILLED UNITS
XXXXXXXXXX	XXXXXXXXXX	12/12/2018 ...	XXXXXXXXXX	05		32
XXXXXXXXXX	XXXXXXXXXX	12/12/2018 ...	XXXXXXXXXX	05		32
XXXXXXXXXX	XXXXXXXXXX	12/12/2018 ...	XXXXXXXXXX	05		32

Showing 1 to 3 of 3 entries

- **HISTORY:** This screen contains the audit history for the visit. Any change made to the visit is tracked and listed on this screen with the most recent change at the top.

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GENERAL	REASON CODE	ITEM	DATE	CHANGED BY
CLIENT	Forgot to Call Out	Visit - Update Service	10/10/2017 12:45:52 PM	
EMPLOYEE				
CALL LOG	Forgot to Call Out	Visit - Update Adjusted Hours	10/10/2017 12:45:52 PM	
EXCEPTIONS	Showing 1 to 2 of 2 entries			
GPS	<input type="button" value="←"/> <input type="button" value="1"/> <input type="button" value="→"/>			
MEMO				
CLAIMS				
HISTORY				

Identifying Exceptions

Visit exceptions are indicated by a colored circle under one or more columns where the exception exists. The columns are: **Client Name, Employee Name, Service, Call In or Call Out.**

- An exception indicates the visit is missing information or the information captured does not meet program requirements.
- A visit may have one or more exception(s).
- Hovering over an indicator displays a pop-up showing the description of the exception(s).

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours
Carter, John	Young, Charles	●	08/14/2017	●	2:47 PM				
Carter, John	Young, Charles	●	08/14/2017	●	2:46 PM				
Carter, John	000-44-6258	●	08/14/2017						

Exceptions:
Visits without in-calls

- Visit exceptions can be reviewed by clicking the Exceptions link when viewing the *Visit Details* screen.
- Certain exceptions (Visit Verification, Service Verification, Signature Verification, Unmatched Client Phone/ID and GPS Distance) can also be cleared from this screen.

Visit Details
✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Carter, John	59647013	999888555101	000-44-6258	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

● Unknown Employees This exception needs to be fixed

● Visits Without Out-Calls This exception needs to be fixed

● Missing Service This exception needs to be fixed

● Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE *	RESOLUTION CODE	REASON NOTE	
Select Reason ▾	Select Resoluti ▾	Enter Reason Note	SAVE

● Client Signature Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE *	RESOLUTION CODE	REASON NOTE	
Select Reason ▾	Select Resoluti ▾	Enter Reason Note	SAVE

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Correcting Exceptions

The condition causing the exceptions must be fixed or where it is not possible, acknowledged before a visit is matched to a claim. Every visit adjustment or correction requires the user to select a reason code, resolution code and in some cases, additional notes. The list of reason codes is configured based on the EVV Program requirements.

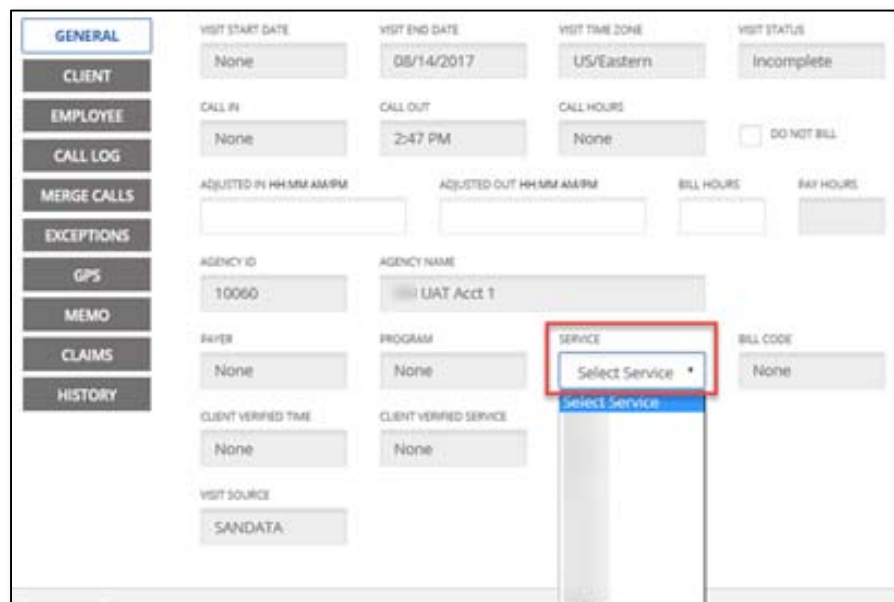
Missing Service Exception

Identifies when the service provided for the visits is not specified during the SMC call-in or Telephony call-out. This type of exception must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Service** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Carter, John	Young, Charles	●	08/14/2017	●	2:47 PM			

2. Select the correct service from the **SERVICE** field drop-down list.



The screenshot shows a form with a sidebar on the left containing menu items: GENERAL, CLIENT, EMPLOYEE, CALL LOG, MERGE CALLS, EXCEPTIONS, GPS, MEMO, CLAIMS, and HISTORY. The main form area contains various fields for visit details. The SERVICE field is highlighted with a red box, and its dropdown menu is open, showing 'Select Service' as the selected option.

3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

4. Select a **RESOLUTION CODE** from the list.



PAYER None	PROGRAM None	SERVICE G015	BILL CODE None
CLIENT VERIFIED TIME None	CLIENT VERIFIED SERVICE None	CLIENT SIGNATURE Yes	
VISIT SOURCE SANDATA			
REASON CODE * Select Reason Cc	RESOLUTION CODE Select Resolution	REASON NOTE Reason Note	SAVE

5. Click **SAVE**.

Unauthorized Service Exception

Identifies when the service selected is not valid for the client. Valid services are based on the client’s association to one or more payers and their associated services. The user will need to

1. Click the exception indicator under the **Service** column.

Client ID	Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours
	Steve, Smith	Jones, Frank		01/09/2019	10:00 AM		
		Jones, Frank	Exceptions: Unauthorized Service	/18/2019	02:01 PM	02:28 PM	00:27

2. Select the appropriate service from the drop-down list. Note that the authorized services for the client must be received in order to fix this exception.

Visit Details Visit Start Date: 01/09/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Steve, Smith			Jones, Frank	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS



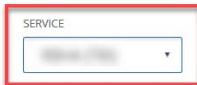
TASKS

EXCEPTIONS


GPS

MEMO

CLAIMS

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
01/09/2019	None	US/Eastern	Incomplete
CALL IN	CALL OUT	CALL HOURS	
10:00 AM	None	None	
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
01/09/2019 	10:00 AM	MM/DD/YYYY 	
AGENCY ID	AGENCY NAME	BILL HOURS	
PAYER	PROGRAM	SERVICE	
			
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	

3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit.



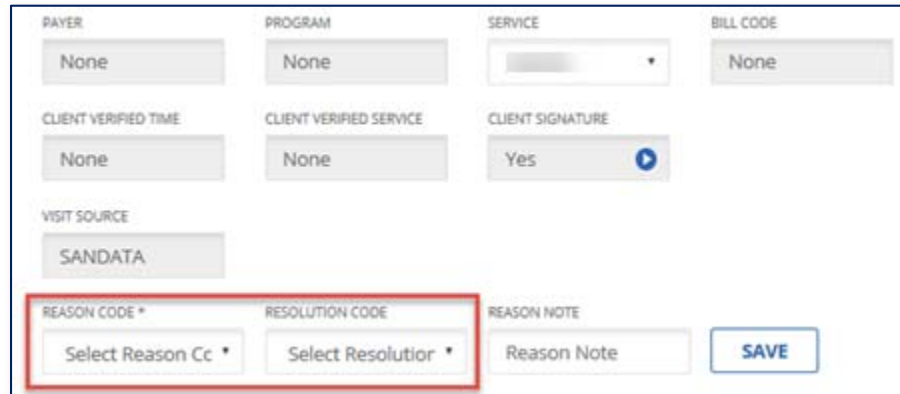
Some reason codes require a **REASON NOTE** before clicking **SAVE**.

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4. Select a **RESOLUTION CODE** from the list.



The screenshot shows a web form for 'Visit Maintenance'. The form contains several input fields and a 'SAVE' button. A red rectangular box highlights two dropdown menus: 'REASON CODE *' and 'RESOLUTION CODE'. The 'REASON CODE *' dropdown shows 'Select Reason Cc *' and the 'RESOLUTION CODE' dropdown shows 'Select Resolutor *'. Other fields include 'PAYER' (None), 'PROGRAM' (None), 'SERVICE' (dropdown), 'BILL CODE' (None), 'CLIENT VERIFIED TIME' (None), 'CLIENT VERIFIED SERVICE' (None), 'CLIENT SIGNATURE' (Yes with a play button), 'VISIT SOURCE' (SANDATA), and 'REASON NOTE' (Reason Note).

5. Click **SAVE**.

Unknown Client Exception

Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the unknown ID under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In
(347)633-5012	Moss, Donna	●	08/15/2017	11:27 AM	11:33 AM	00:06	

2. Use the search fields to search for the client.

GENERAL No Client has been assigned to this visit.

CLIENT Find Client

EMPLOYEE

CALL LOG

LAST NAME FIRST NAME CLIENT ID #

Enter Last Name Enter First Name Enter Client ID #

3. Select the client from the search results.

CLIENT Find Client

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

LAST NAME FIRST NAME CLIENT ID #

gr Enter First Name Enter Client ID #

Actions	Last Name	First Name	Client ID #	Primary Phone #	Medicaid ID
<input type="radio"/>	Green	Greg	70321170	5161234567	555566667890
<input checked="" type="radio"/>	Greene	Mark	2687272	9999999999	748748748748

Showing 1 to 2 of 2 entries

« < 1 > »

REASON CODE * RESOLUTION CODE * REASON NOTE

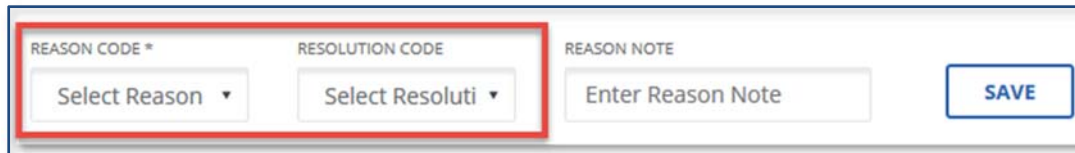
Reason Note

4. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

5. Select a **RESOLUTION CODE** from the list.



The screenshot shows a form with four main components: a dropdown menu for 'REASON CODE *' with the text 'Select Reason', a dropdown menu for 'RESOLUTION CODE' with the text 'Select Resoluti', a text input field for 'REASON NOTE' with the placeholder text 'Enter Reason Note', and a blue 'SAVE' button. A red rectangular box highlights the two dropdown menus.

6. Click **SAVE**.

Unknown Employee Exception

Identifies when the Santrax ID entered during a Telephony call-in/call-out does not match to any known employee. The ID entered is displayed instead of the employee name. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the unknown ID in under the **Employee Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In
Carter, John	000-44-6258		08/14/2017	3:38 PM			

2. Use the search fields to search for the employee.
3. Select an employee from the search results.

CLIENT

Find Employee

EMPLOYEE

LAST NAME

FIRST NAME

EMPLOYEE ID #

DISCIPLINE

CALL LOG

Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input checked="" type="radio"/>	Vi	Michael	986532	000027419	HCA
<input type="radio"/>	vera	vera	8888888888	000278215	

MERGE CALLS

EXCEPTIONS

GPS

4. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

5. Select a **RESOLUTION CODE** from the list.

REASON CODE *

RESOLUTION CODE

REASON NOTE

6. Click **SAVE**.

Unmatched Client Phone/ID

Identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Unmatched Client ID / Phone exception line.

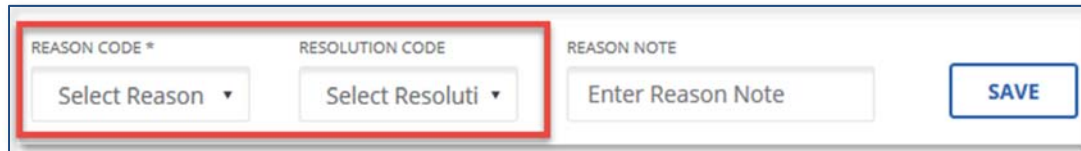


2. Select a **REASON CODE** from the list.



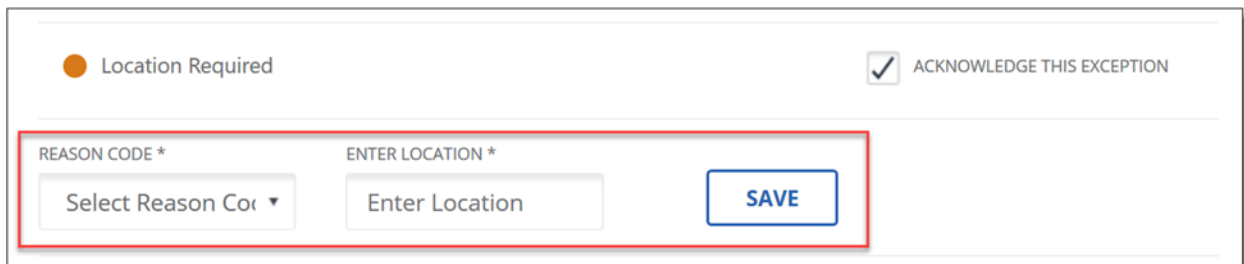
Some reason codes require a **REASON NOTE** before clicking **SAVE**.

3. Select a **RESOLUTION CODE** from the list.



4. Click **SAVE**. The *Call Log* screen shows the originating phone number for the call.

GENERAL	CALL IN			CLIENT ID# 0059647013
CLIENT	CALL DATE	CALL TIME	CALL TYPE	SERVICE
	08/16/2017	6:48 AM	EW (telephony)	N/A
EMPLOYEE	USER	ORIGINATING PHONE #	CALL SOURCE	
CALL LOG	000106825	(718) [REDACTED]	SANDATA	



Visit Without Calls

Identifies when a scheduled visit does not have any calls times. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Scheduled Time In	Scheduled Time Out	Scheduled Hours	Call In	Call Out	Call Hours
Greene, Mark	Young, Charlie	Personal Care	08/12/2019	04:00 PM	06:00 PM	02:00	●		

2. Click on the visit to open the Visit Details and go the Exception screen. The exception appears indicating that it needs to be fixed.

No Show Exception
 ACKNOWLEDGE THIS EXCEPTION

Visits Without Any Calls
 This exception needs to be fixed

3. Click on the Call Log screen to manually add call times to the visit.

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

Add Manual Call

CALL DATE * MM/DD/YYYY

CALL TIME * HH:MM AM/PM

SERVICE

TIME ZONE

MM/DD/YYYY

03:17 PM

Select Service ▼

US/Eastern

REASON CODE *

REASON NOTE

Select Reason Code ▼

Reason Note

ADD

4. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

5. Click **SAVE**

Visit Without In-Call/Visit Without Out-Call

Identifies a visit which does not have a call-in or call-out time. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

Client Name	Employee Name	Service	Visit Date	Call In
Carter, John	Young, Charles	G015	08/14/2017	●

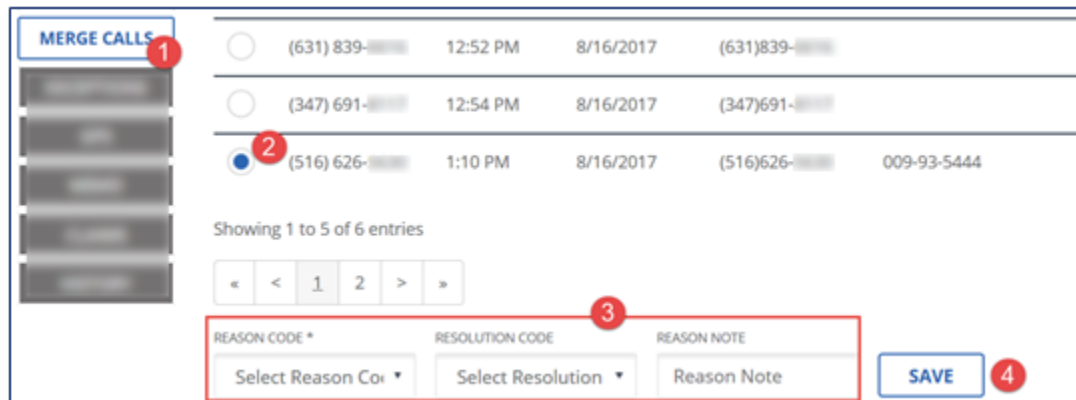
Client Name	Employee Name	Service	Visit Date	Call In	Call Out
		●	08/11/2017	8:58 AM	●



When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

It is recommended to go to the *Merge Calls* screen first to see if there are any available calls that can be merged. If there are none, the user can go back to the *Call Log* to manually add a call time.

Merge Calls



The screenshot shows the 'MERGE CALLS' interface. It features a list of calls with columns for phone number, time, date, and another phone number. Call 3 is selected. Below the list is a pagination control showing 'Showing 1 to 5 of 6 entries'. At the bottom, there are three input fields: 'REASON CODE *', 'RESOLUTION CODE', and 'REASON NOTE', each with a dropdown menu. A 'SAVE' button is located to the right of these fields.

1. Click the **MERGE CALLS** link to see if there are any available calls that can be merged to the visit.
2. Click the radio button next to the line to select the call, if there is a call to merge.
3. Select the **REASON CODE**, **RESOLUTION CODE** and **REASON NOTE**, if needed.
4. Click **SAVE**.

No Show Exception

Identifies when an employee did not call in for a scheduled visit before a configurable time threshold passed. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

Scheduled Time In	Scheduled Time Out	Scheduled Hours	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
02:00 PM	03:00 PM	01:00	●				

Exceptions:
 No Show Exception



It is recommended to go to the *Merge Calls* screen first to see if there are any available calls that can be merged. If there are none, the user can go back to the *Call Log* to manually add a call time. See steps to add a manual call.

Add Manual Call

When a manual call is added, call hours are calculated for the visit. There may be additional exceptions associated with the visit that need to be fixed or acknowledged for the visit to be matched to a claim.

CALL IN CLIENT ID# 0013199752

CALL DATE	CALL TIME	CALL TYPE	SERVICE
08/17/2017	1:00 AM	Manual Call	N/A
USER	CALL SOURCE	SANDATA	

Add Manual Call

CALL DATE * MM/DD/YYYY

CALL TIME * HH:MM AM/PM

REASON CODE *

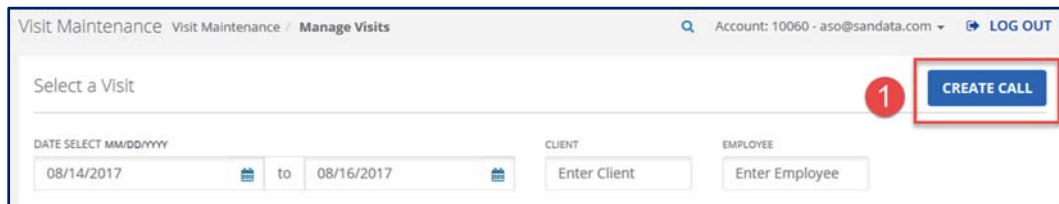
RESOLUTION CODE SERVICE REASON NOTE

1. Click **CALL LOG**.
2. Enter the appropriate information into the fields.
3. Select the **REASON CODE**, **RESOLUTION CODE**, **SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

Create Call

The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred but the employee did not call-in or call-out.

1. Click **CREATE CALL** on the *Visit Maintenance* screen.



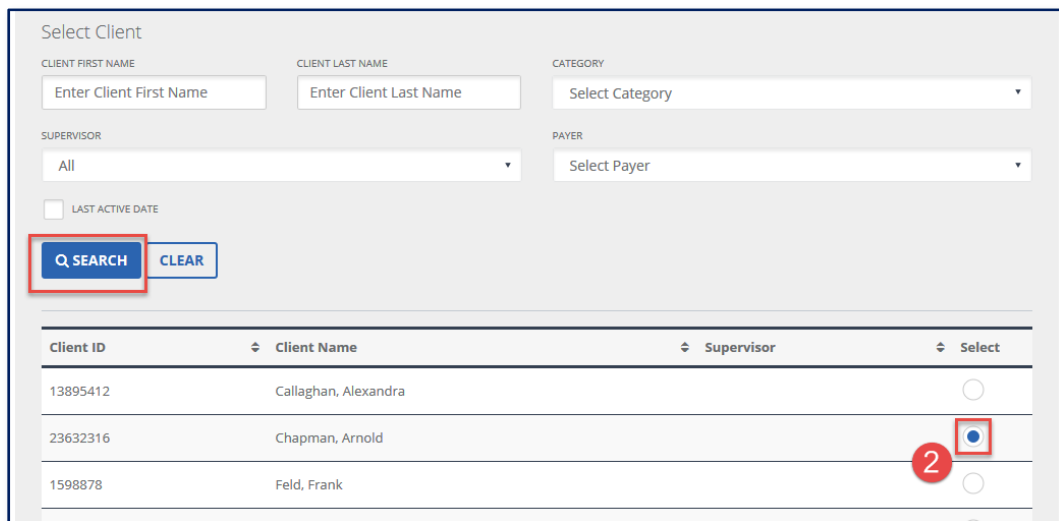
Visit Maintenance / Visit Maintenance / Manage Visits Account: 10060 - aso@sandata.com LOG OUT

Select a Visit

DATE SELECT MM/DD/YYYY 08/14/2017 to 08/16/2017 CLIENT Enter Client EMPLOYEE Enter Employee

1 CREATE CALL

2. Search for and select a client.



Select Client

CLIENT FIRST NAME Enter Client First Name CLIENT LAST NAME Enter Client Last Name CATEGORY Select Category

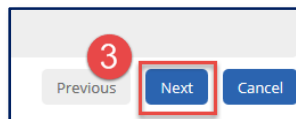
SUPERVISOR All PAYER Select Payer

LAST ACTIVE DATE

1 Q SEARCH CLEAR

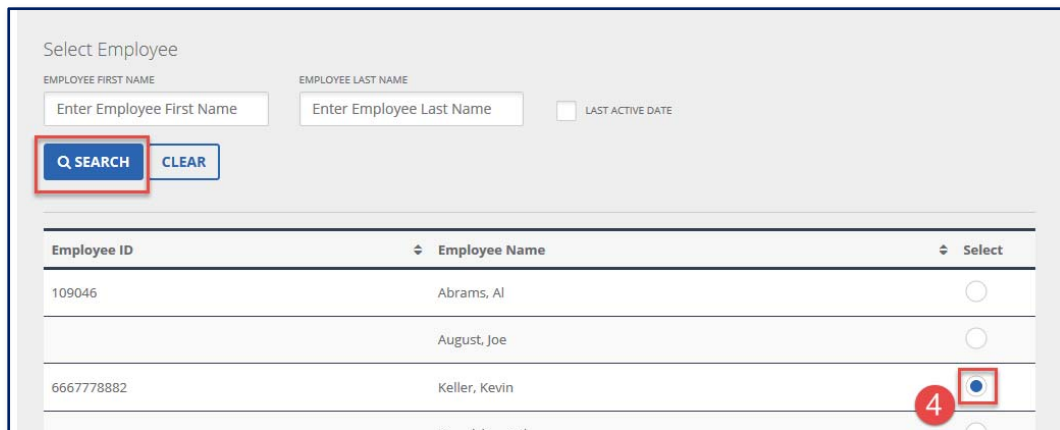
Client ID	Client Name	Supervisor	Select
13895412	Callaghan, Alexandra		<input type="radio"/>
23632316	Chapman, Arnold		2 <input checked="" type="radio"/>
1598878	Feld, Frank		<input type="radio"/>

3. Click **Next**.



3 Previous **Next** Cancel

- Search for and select an employee.



Select Employee

EMPLOYEE FIRST NAME: Enter Employee First Name

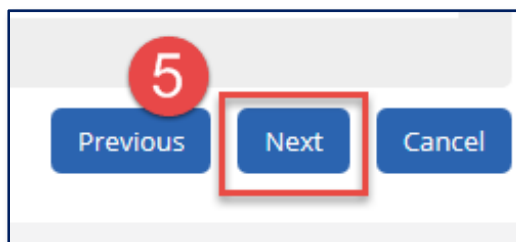
EMPLOYEE LAST NAME: Enter Employee Last Name

LAST ACTIVE DATE

Q SEARCH CLEAR

Employee ID	Employee Name	Select
109046	Abrams, Al	<input type="radio"/>
	August, Joe	<input type="radio"/>
6667778882	Keller, Kevin	<input checked="" type="radio"/>

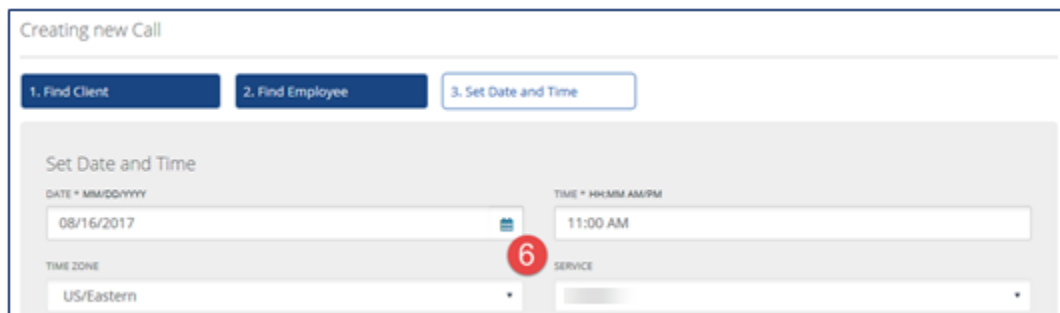
- Click **Next**.



5

Previous Next Cancel

- Enter the **DATE***, **TIME*** and **SERVICE** details.



Creating new Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY: 08/16/2017

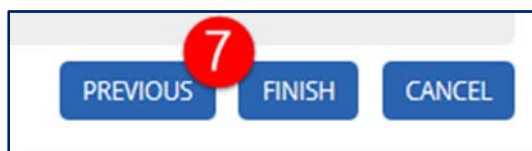
TIME * HH:MM AM/PM: 11:00 AM

TIME ZONE: US/Eastern

SERVICE: [dropdown]

6

- Click **FINISH**.



7

PREVIOUS FINISH CANCEL

9 Group Visits

Module Time

60 minutes

This lesson demonstrates how to utilize the Group Visit functionality in SMC, TVV, and EVV to capture visits when one or more employees are providing to one or more clients at the same time.

Module Objectives

After completing this lesson, you will be able to:

- start, join and end a group visit using SMC;
- start, join and end a group visit using TVV;
- search for group visits in EVV Visit Maintenance;
- create a group visit call in EVV Visit Maintenance; and
- edit/enter a group visit code for a visit.

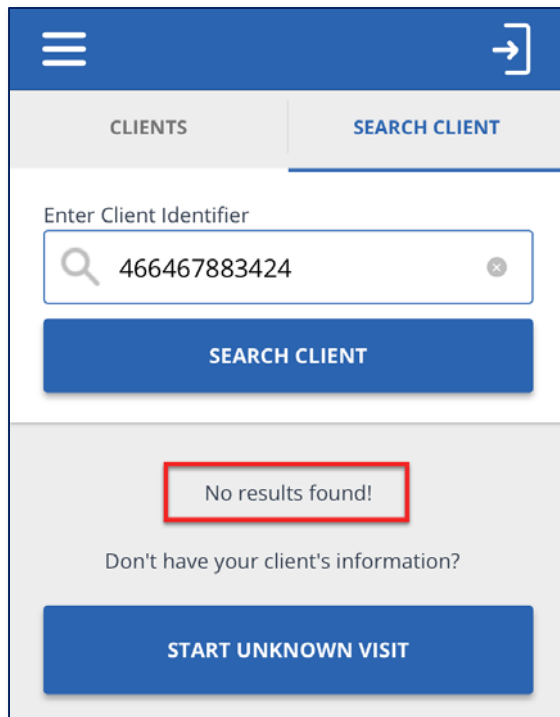
The Group Visit option allows one employee to call-in and call-out for one or more client visits at the same time, or multiple employees to call-in and call-out for one or more client visits at the same time. Group visits can be captured via SMC, TVV and EVV Visit Maintenance.

Sandata Mobile Connect (SMC)

Starting a new Group Visit

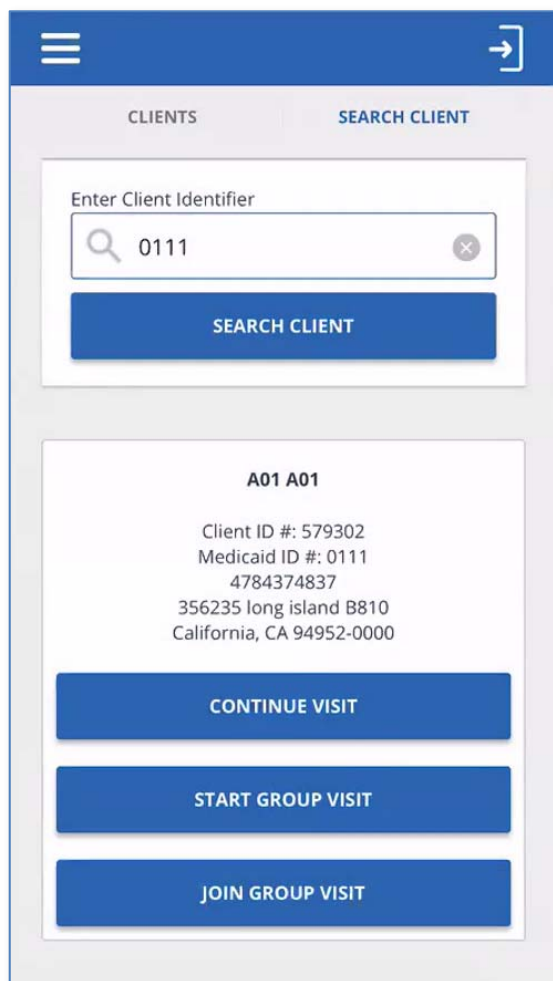
When the employee arrives to provide care to the client(s), he or she will:

1. Locate the EVV Device or the employee’s personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or the system generated client ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a “No results found” message displays).

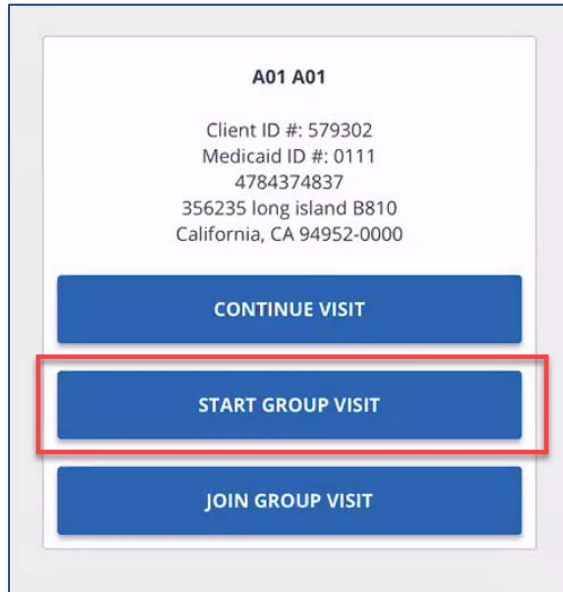


When the client details display, there are options to **CONTINUE VISIT**, **START GROUP VISIT** or **JOIN GROUP VISIT**.

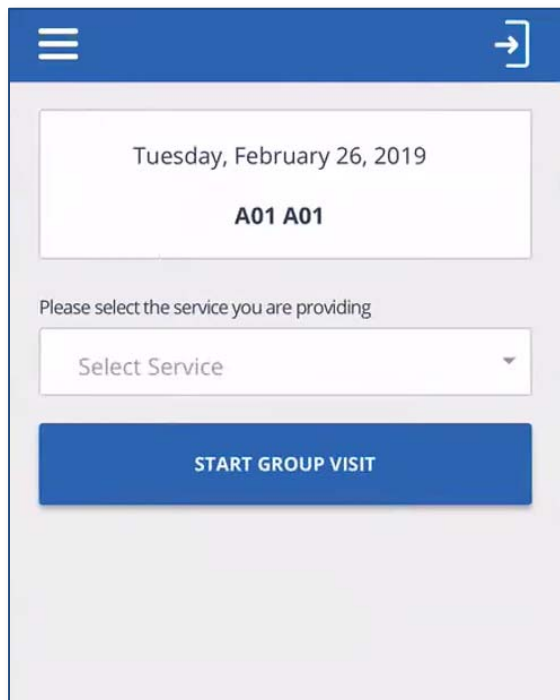
- **CONTINUE VISIT:** this option allows the employee to start a single client visit.
- **START GROUP VISIT:** this option allows an employee to start a new group visit and add clients to the group visit.
- **JOIN GROUP VISIT:** this option allows an employee to join an existing group visit started by another employee who is also providing care at the same location. The employee can add their clients to that group.



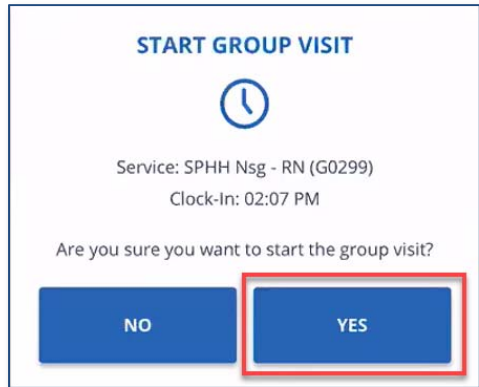
1. Tap **START GROUP VISIT**.



2. Select the appropriate Service from the drop-down list then tap **START GROUP VISIT**.



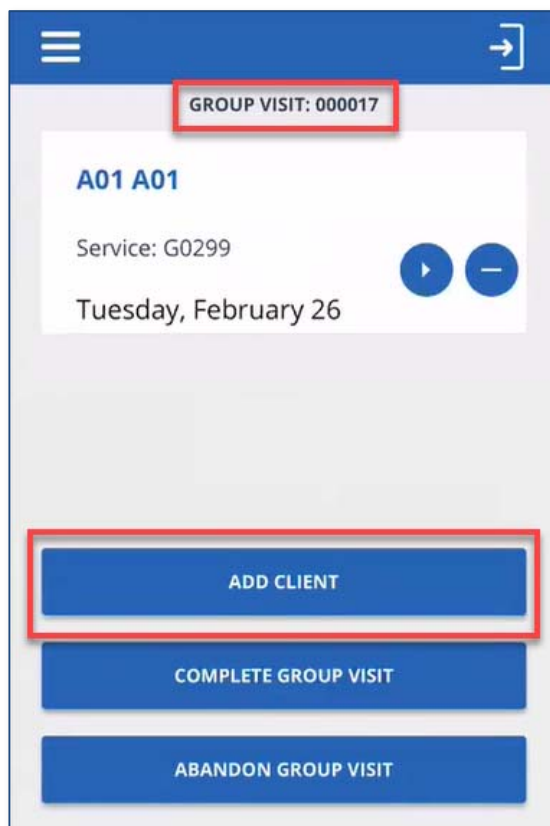
1. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



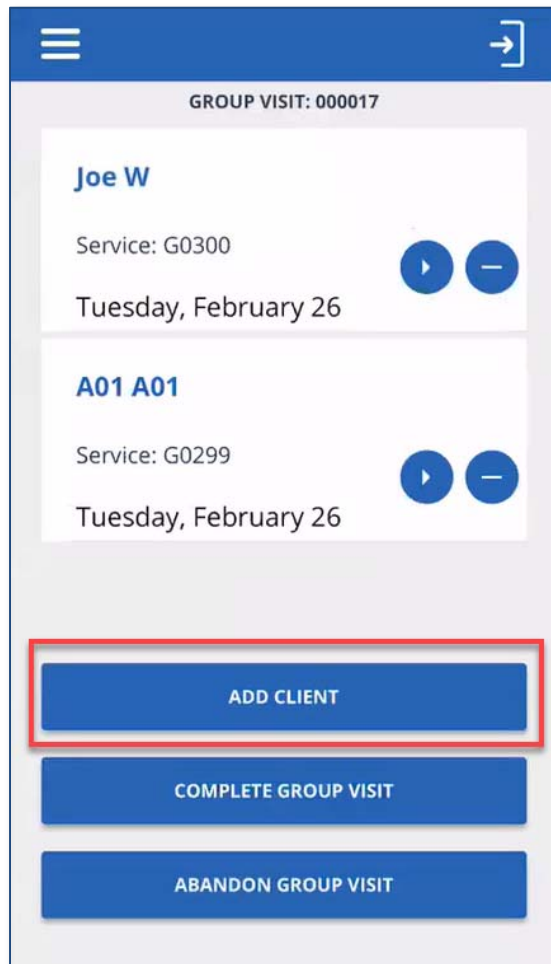
The visit is in progress and a Group Visit code is generated. This 6-digit code is used to identify all clients at a location who are receiving care from one or more employees from the same provider agency.

The employee may add additional clients they are providing care for the group visit.

The employee may also give the Group Visit code to other employees arriving to provide care to the same clients or different clients at the location. Group visit codes are only valid for use within a provider agency.



1. Tap **ADD CLIENT** to search for additional clients to add to the group. Once added, the clients will appear on the Group Visit screen.



An employee will only see the clients he or she added to the group visit, even if other employees join the group and add clients.



There is no limit to the number of known clients an employee can add to a group visit, or the number of employees who can join a group visit. However, an employee can only add one unknown client to a group visit.

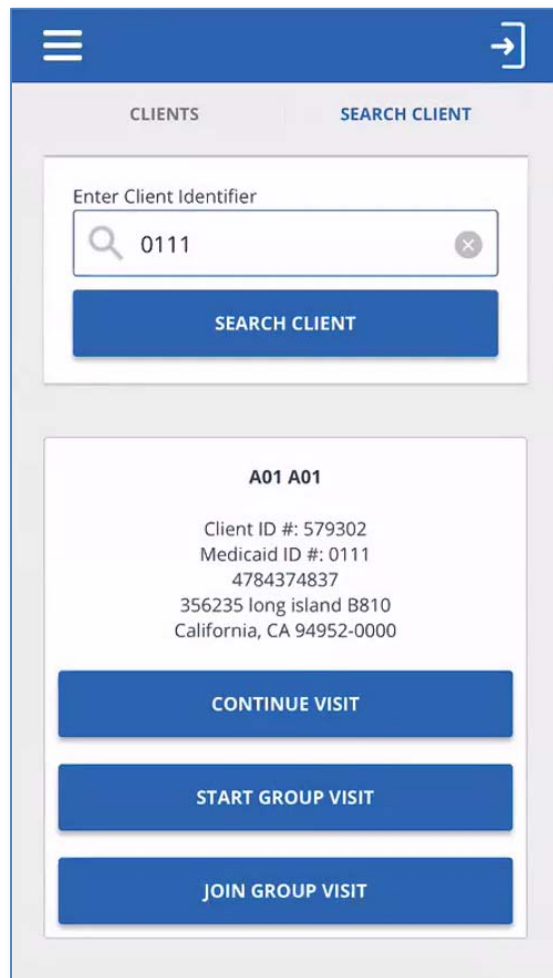


A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.

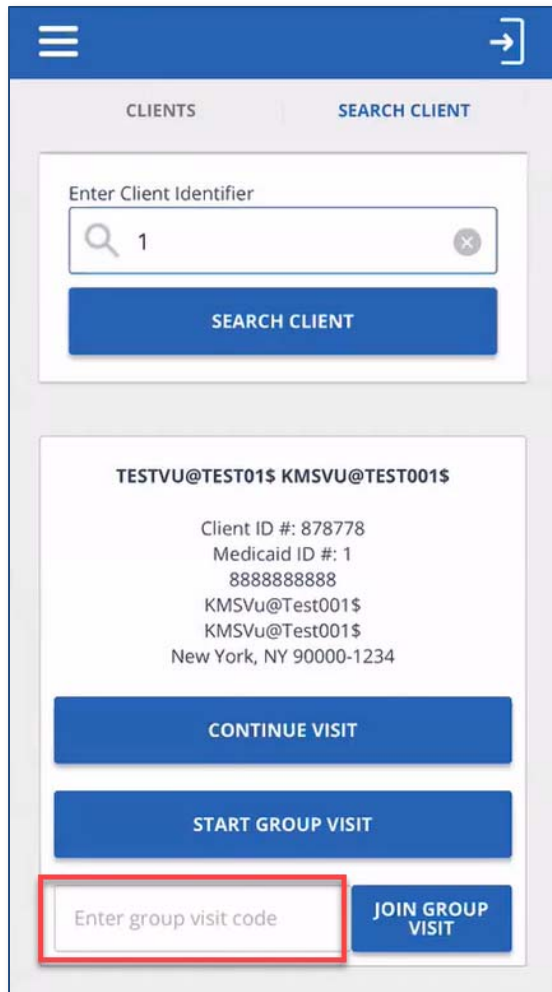
Joining a Group Visit

If an employee needs to join an existing group visit upon arriving at a location, the employee will:

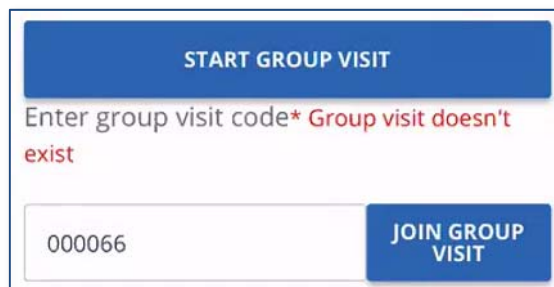
1. Locate the EVV Device or the employee’s personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a “No results found” message displays).
5. When the client details display, tap **JOIN GROUP VISIT**.



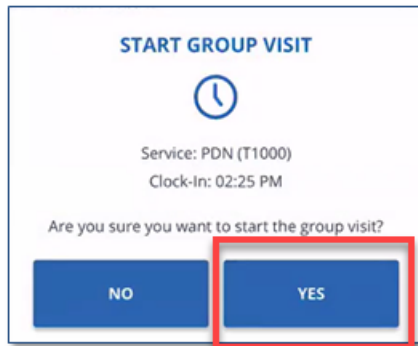
6. Enter the 6-digit group visit code and tap **JOIN GROUP VISIT**.



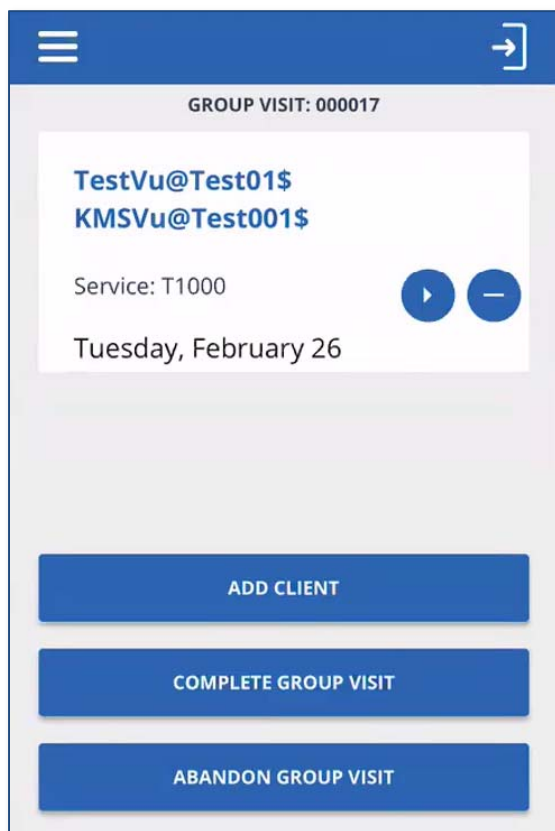
- The Group Visit code must be 6-digits in length.
- The code is only valid for use within the same agency.
- If an invalid code is entered, the following message is displayed.

7. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



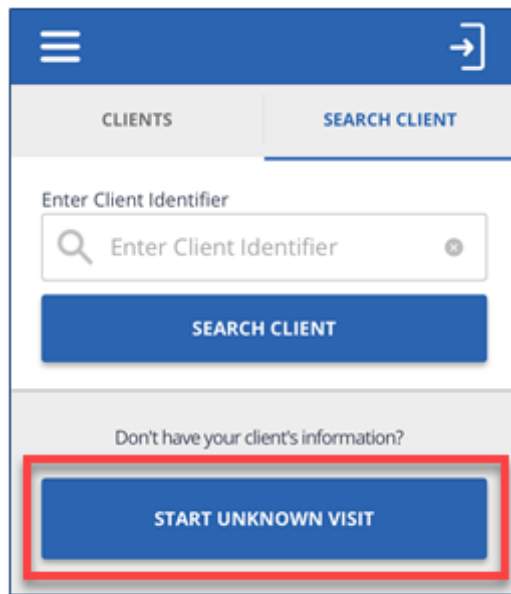
The client is added to the existing in progress Group Visit. The employee may add additional clients or log out of SMC.



Adding an Unknown Client to a Group Visit

If the Medicaid ID or Client ID entered when searching for a client does not return any results, the employee can add an unknown client to the group visit. An employee can only add a maximum of one unknown client to a group visit.

1. From the home screen, Tap **START UNKNOWN VISIT**.



2. Enter the required information and tap **CONTINUE VISIT**.
 - **FIRST NAME** (Required)
 - **LAST NAME** (Required)
 - **MEDICAID ID #** (Optional – if available)

START UNKNOWN VISIT

Please enter the client's name before continuing

FIRST NAME *

LAST NAME *

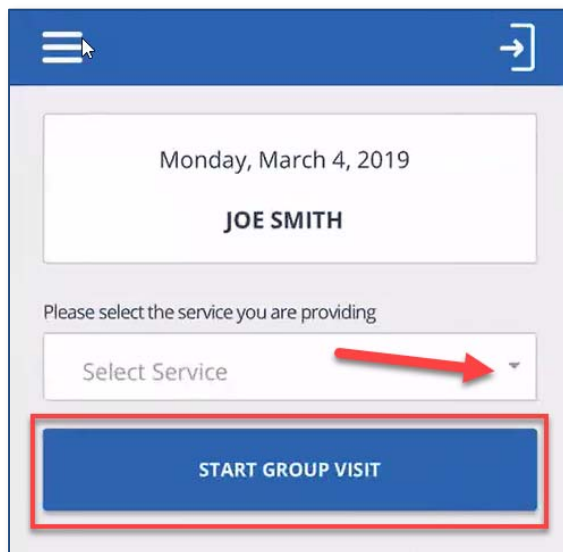
MEDICAID ID #

*denotes required field

CANCEL

CONTINUE VISIT


3. Select the Service from the drop-down list and tap **START GROUP VISIT**.



Monday, March 4, 2019

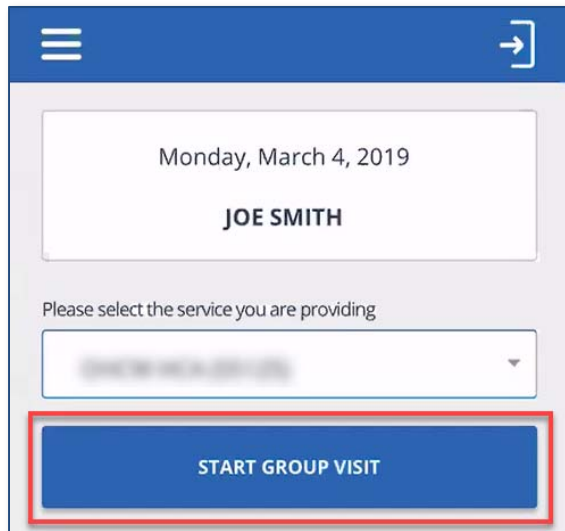
JOE SMITH

Please select the service you are providing

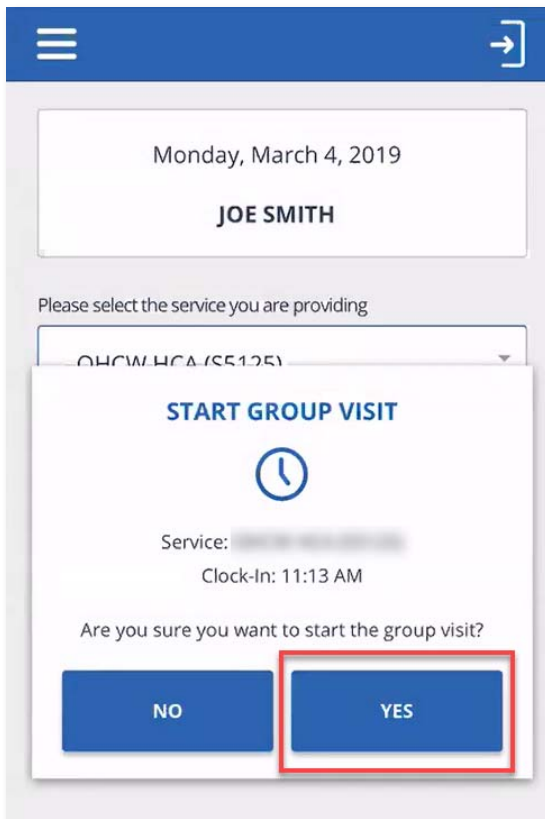
Select Service 

START GROUP VISIT

4. Tap **START GROUP VISIT** again.



5. Tap **YES** to confirm adding the unknown client to the group visit.



Completing a Group Visit

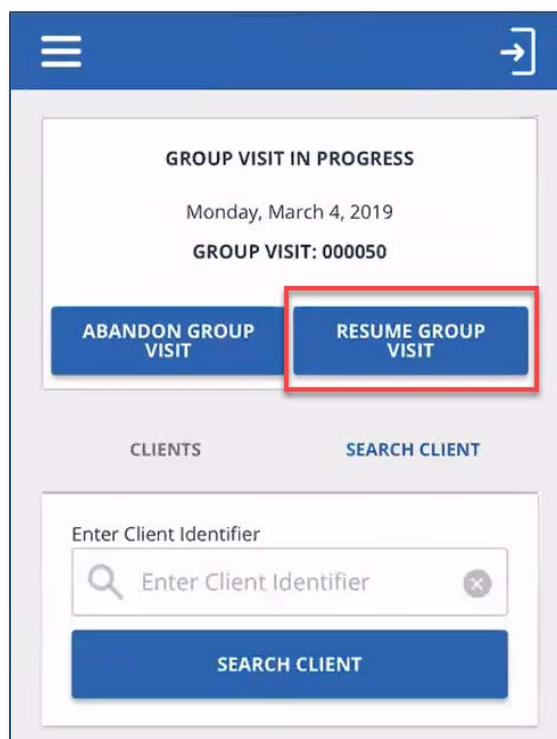
An employee can complete his or her visits within a group individually or complete all visits within a group together.



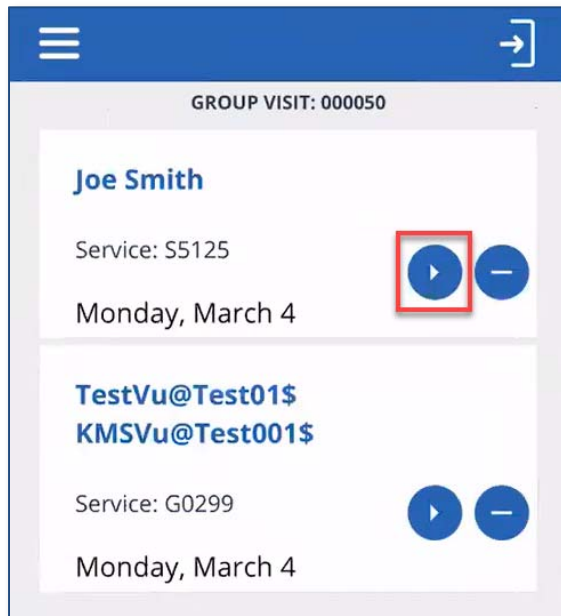
Completing all visits within a group at the same time requires that the visit process is the same for all the clients. If one or more clients have a different call-out process, the employee must complete the visits individually.

Completing a visit within a Group Visit Individually

1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap the 'Play' icon () on a visit to complete.



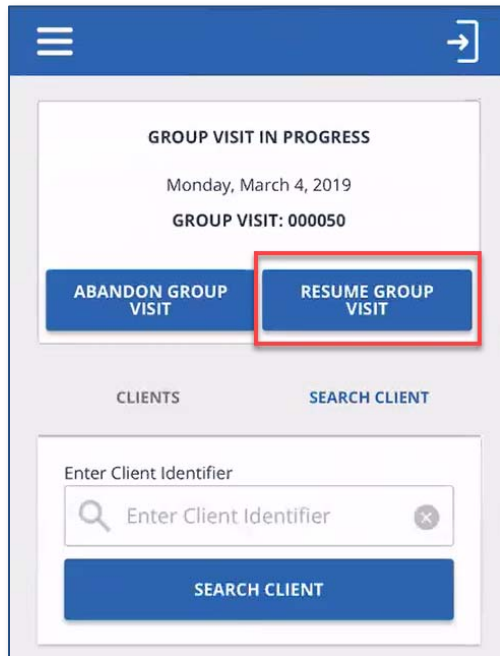
4. Complete the visit following the individual visit process.



Tapping the 'dash' icon (⊖) allows the employee to abandon the individual visit. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

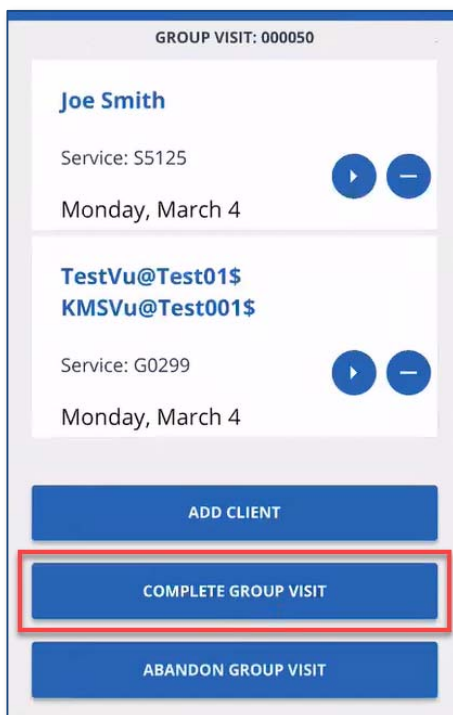
Completing all visits within a Group Visit Together

1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.

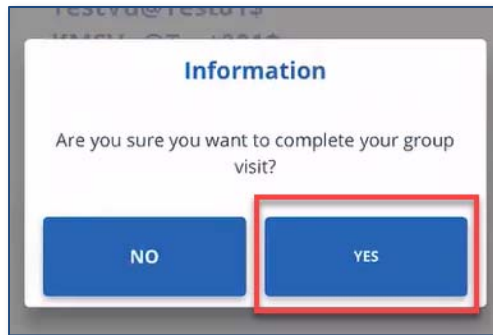


3. Tap **COMPLETE GROUP VISIT**.

SS



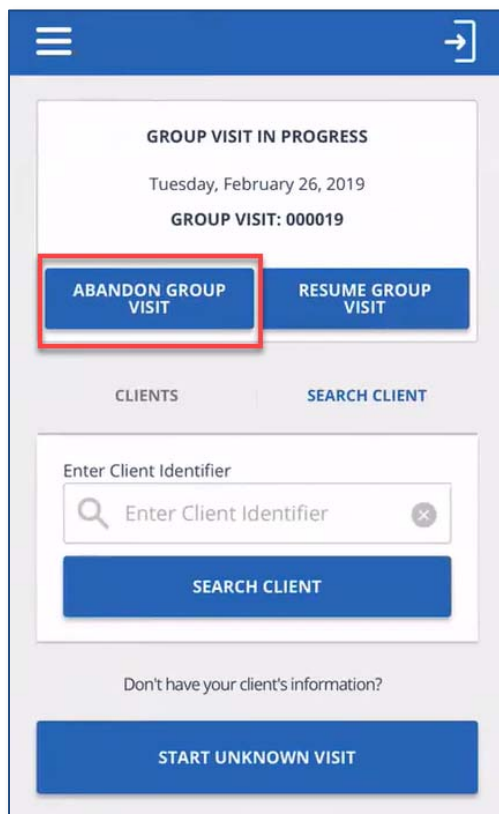
4. Tap **YES** to confirm completion of the group visit.



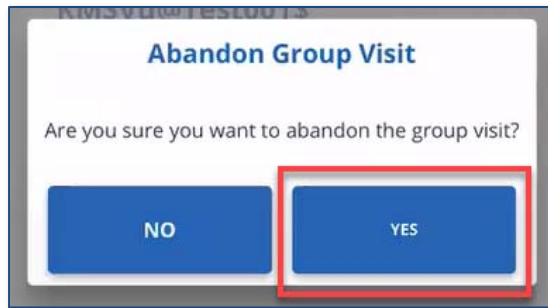
When completing a group visit, the employee is completing his or her client's visits.

Abandoning a Group Visit

1. Log back in to SMC.
2. Tap **ABANDON GROUP VISIT**.




1. Tap **YES** to confirm abandoning the group visit.



When abandoning a group visit, all of the employee's visits within the group appear in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Telephonic Visit Verification

Group Visit Call Reference Guide Sample


















Call Reference Guide:
«COMPANY_NAME»


















Agency Account Number: **STX«ACCOUNT»**























Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:
 STX ID Verification / Playback Group Visit – Yes
 CIOP Select Service
 Client Voice Recording Client Verification: Visit
 Client Verification: Service

Calling Instructions	STX«ACCOUNT»
<p>Calling In: When arriving at the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> • Your Santrax ID. • Your Client(s) ID. • Group visit code if available. 	
<p>1.  Dial any of the toll-free numbers assigned to your agency. <i>If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.</i></p>	
<p> Santrax will say: "Welcome, please enter your Santrax ID."</p>	
<p>2.  Press the numbers of your Santrax ID on the touch tone phone.</p>	
<p> Santrax will say: "You entered (SANTRAX ID). Press (1) for Yes, (2) for No."</p>	
<p>3.  Press (1) to confirm your Santrax ID or press (2) to retry.</p>	
<p> Santrax will say: "Is this a group visit? Press (1) for Yes or (2) for No."</p>	
<p>4.  Press (1) for group visit.</p>	
<p> Santrax will say: "Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."</p>	
<p><i>(1) To start a new group visit:</i></p>	<p><i>(3) To join an existing group visit:</i></p>
<p>5.  Press (1) to start a new group visit.</p>	<p>5.  Press (3) to join an existing group visit.</p>
<p> Santrax will say: "You will <i>start</i> a new group visit with visit code (GROUP CODE)."</p>	<p> Santrax will say: "Please enter the group visit code."</p>
<p>6. Continue to step 6.</p>	<p>6.  Press the numbers of the group visit code.</p>
<p> Santrax will say: "You will <i>join</i> the group visit with visit code (GROUP CODE)."</p>	
<p> "... Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call."</p>	

Calling Instructions	STX«ACCOUNT»
7.  Press (1) to add a client.	
 Santrax will say: "Please select (1) to call in or (2) to call out."	
8.  Press the (1) key to "Call In".	
 Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."	
9.  Press the numbers of the client's ID.	
 Santrax will say: "Please enter second client ID or hang up if done."	
10. Repeat step  for each additional client beyond the first.	Or
 Hang up if done.	
<p>Calling Out: When leaving the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> Your Santrax ID. The Service ID. The group visit code. The Client is available to verify the visit. 	
11. Follow steps  thru  to and then continue.	
 Santrax will say: "Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."	
12.  Press (2) to continue your group visit.	
 Santrax will say: "Please enter the group visit code."	
13.  Press the numbers of the group visit code.	
 Santrax will say: "You will continue group visit with visit code (GROUP CODE). Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call."	
<i>NOTE: If you made a mistake and need to discard <u>all</u> data you have previously entered for <u>all</u> visits in this group, press (4) to abandon the whole group visit.</i>	
14.  Press the (2) key to complete the visit for a client.	
 Santrax will say: "Please select (1) to call in or (2) to call out."	

Calling Instructions	STX«ACCOUNT»
15.  Press the (2) key to "Call Out".	
 Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."	
16.  Press the numbers of the client's ID.	
 Santrax will say: "Please enter the Service ID."	
17.  Press the Service ID Number you performed.	Refer to your agency's service list.
 Santrax will say: "You entered (SERVICE). Please press (1) to accept, (2) to retry."	
18.  Press the one (1) key to accept, or press the two (2) key to retry.	
 Santrax will say: "To record the client's voice please press (1) and hand the phone to the client, or press (2) if the client is unable to participate."	
19.  Press '1' to record the client's voice.	OR
 Press '2' if the client is unable to participate.	If the client is unable to participate, skip to step  .
20.  Hand the phone to the client and the client will be asked to state their name and today's date.	
 Santrax will say: "Please say your first and last name and today's date."	
21.  The client should say their first and last name and today's date.	
 Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press (1) to confirm, (2) to deny, (3) to replay."	
22.  The client should press the appropriate option.	
 Santrax will say: "The service performed was (SERVICE). Press (1) to confirm, (2) to deny, (3) to replay."	
23.  The client should press the appropriate option.	
 Santrax will say: "Please enter second client ID or hang up if done."	
24. Repeat steps  thru  for each additional client beyond the first.	Or
 Hang up if done.	

Group Visit Call Process – Multi-Language Line

Call-In	
1	Dial either toll-free number.
	<i>Santrax will say the available language prompts. *Each prompt will be heard in its respective language.</i>
2	Press the number that corresponds to the desired language.
	<i>Santrax will say: "Welcome, please enter your Santrax ID."</i>
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	<i>Santrax will say: "You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No." If the Santrax ID entered does not match to an employee record, Santrax will say: "You have entered an invalid Santrax ID, please try again."</i>
4	Press 1 for Yes.
	<i>Santrax will say: "Is this a Group Visit, press 1 for Yes or 2 for No."</i>
5	Press 1 for Yes.
	<i>Santrax will say: "Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group visit menu."</i>
6	Press 1 to start a new group visit.
	<i>Santrax will say: "You will start a new group visit with group visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete a visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."</i>
7	Press 1 to add a client.
	<i>Santrax will say: "Press 1 to call-in or 2 to call-out."</i>
8	Press 1 to call-in.
	<i>Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."</i>
9	Enter the client ID for the first client being added to the group visit.
	<i>Santrax will say: "Enter second client ID or hang up if done." *</i> <i>*Repeat step 9 for each client being added to the group visit.</i>
10	Hang up.

Call-Out	
1	Dial either toll-free number.
	<i>Santrax will say the available language prompts. *Each prompt will be heard in its respective language.</i>
2	Press the number that corresponds to the desired language.
	<i>Santrax will say: "Welcome, please enter your Santrax ID."</i>
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	<i>Santrax will say: "You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No." If the Santrax ID entered does not match to an employee record, Santrax will say: "You have entered an invalid Santrax ID, please try again."</i>
4	Press 1 for Yes.
	<i>Santrax will say: "Is this a Group Visit, press 1 for Yes or 2 for No."</i>
5	Press 1 for Yes.
	<i>Santrax will say: "Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group menu."</i>
6	Press 2 to continue the group visit.
	<i>Santrax will say: "Please enter the group visit code." * *If the code entered is not valid, Santrax will say: "You have entered an invalid visit code. Please try again."</i>
7	Enter the 6-digit group visit code.
	<i>Santrax will say: "You will continue the group visit with visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."</i>
8	Press 2 to complete the visit.
	<i>Santrax will say: "Please select 1 to call-in or 2 to call out."</i>
9	Press 2 to call-out.
	<i>Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."</i>
10	Enter the client ID number.
	<i>Santrax will say: "Please enter the Service ID."</i>

11	Press the three-digit ID of the care performed (Service IDs are listed on the back of the Call Reference Guide).
	<i>Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."</i>
12	Press the 1 to accept.
	<i>Santrax will say: "Enter second client ID or hang up if done."</i> Enter the next client ID to complete from the group visit. (repeat steps 10 – 12 for each additional client in the group) Hang up when the last client has been entered.

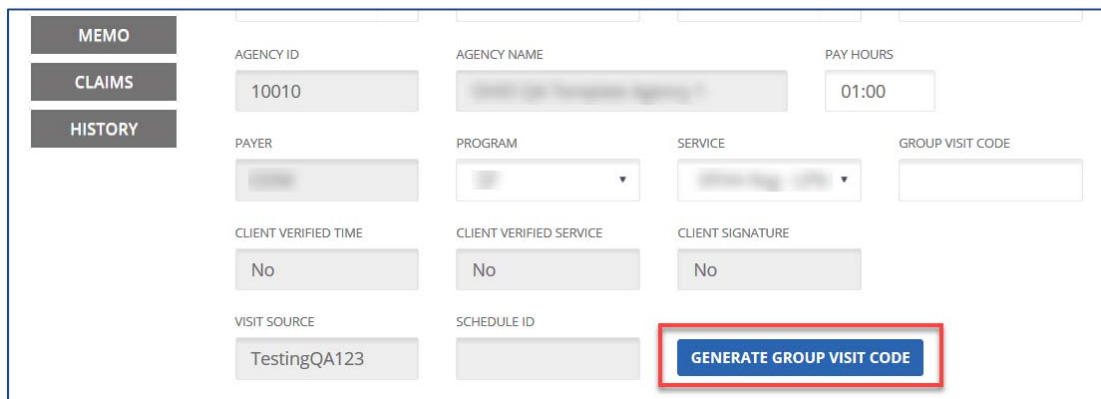
Visit Maintenance - Generating/Editing Group Visit Codes



A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.

Adding a Code

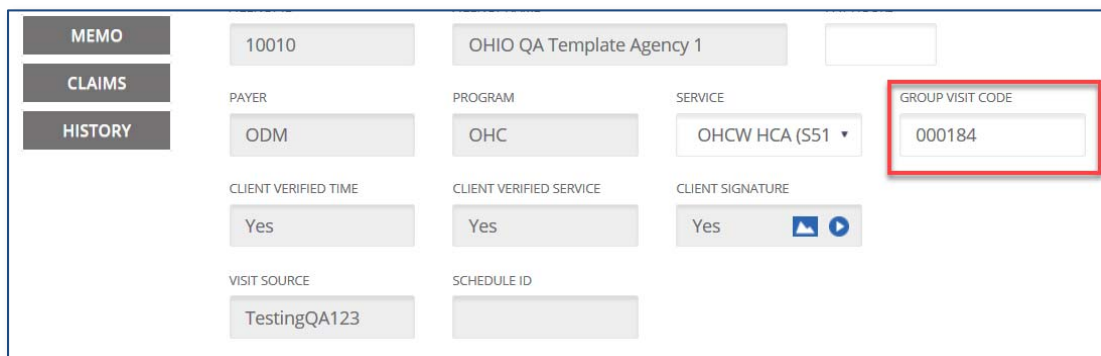
If a visit that took place should have been captured as a group visit, a user can create a group visit code after the fact in Visit Maintenance. The group visit code can be generated from the *General* screen of the Visit Details by clicking the **GENERATE GROUP VISIT** button. This creates a 6-digit code and adds it to the **GROUP VISIT CODE** field.



The screenshot shows the 'General' screen of the Visit Details form. On the left, there are three tabs: MEMO, CLAIMS, and HISTORY. The main form contains several fields: AGENCY ID (10010), AGENCY NAME (OHIO QA Template Agency 1), PAY HOURS (01:00), PAYER (ODM), PROGRAM (OHC), SERVICE (OHCW HCA (S51)), and GROUP VISIT CODE (empty). Below these are fields for CLIENT VERIFIED TIME (No), CLIENT VERIFIED SERVICE (No), and CLIENT SIGNATURE (No). At the bottom, there are fields for VISIT SOURCE (TestingQA123) and SCHEDULE ID (empty). A blue button labeled 'GENERATE GROUP VISIT CODE' is highlighted with a red rectangular box.

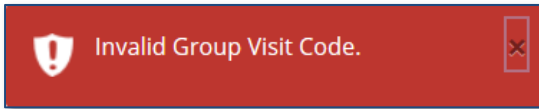
Editing a Code

If a visit is linked to an incorrect group visit or was supposed to be part of an existing group visit, a user can edit the existing code in the **GROUP VISIT CODE** field on the General screen of the Visit Details.



The screenshot shows the 'General' screen of the Visit Details form, similar to the previous one. The 'GROUP VISIT CODE' field now contains the value '000184' and is highlighted with a red rectangular box. Other fields remain the same: AGENCY ID (10010), AGENCY NAME (OHIO QA Template Agency 1), PAY HOURS (empty), PAYER (ODM), PROGRAM (OHC), SERVICE (OHCW HCA (S51)), CLIENT VERIFIED TIME (Yes), CLIENT VERIFIED SERVICE (Yes), CLIENT SIGNATURE (Yes), VISIT SOURCE (TestingQA123), and SCHEDULE ID (empty).

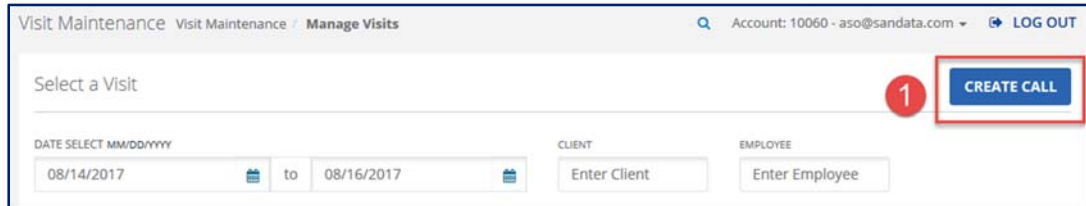
If the code entered is not a valid group visit code, an invalid group visit code message displays.



Create Call

The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred but the employee did not call-in or call-out.

1. Click **CREATE CALL** on the *Visit Maintenance* screen.



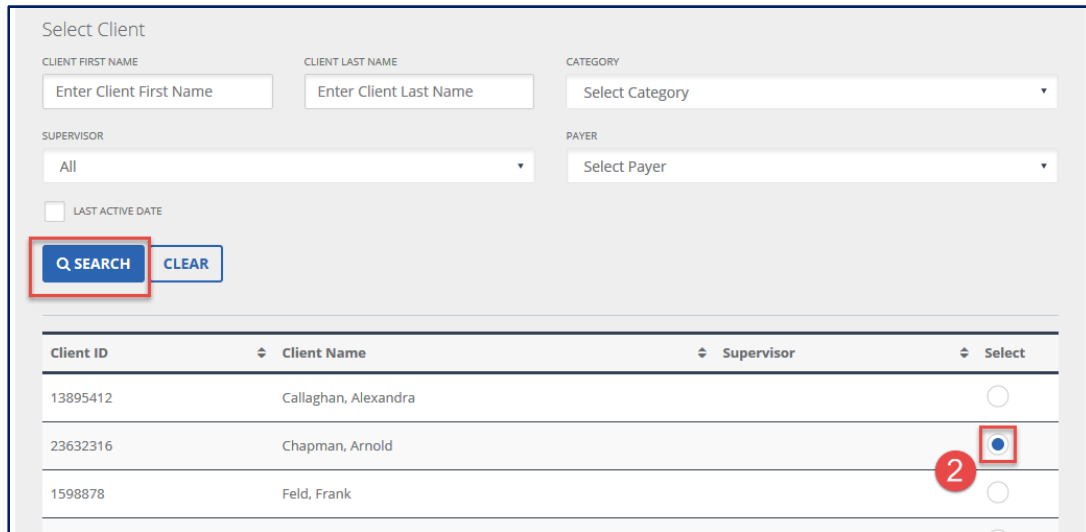
Visit Maintenance Visit Maintenance / Manage Visits Account: 10060 - aso@sandata.com LOG OUT

Select a Visit

DATE SELECT MM/DD/YYYY 08/14/2017 to 08/16/2017 CLIENT Enter Client EMPLOYEE Enter Employee

1 **CREATE CALL**

2. Search for and select a client.



Select Client

CLIENT FIRST NAME Enter Client First Name CLIENT LAST NAME Enter Client Last Name CATEGORY Select Category

SUPERVISOR All PAYER Select Payer

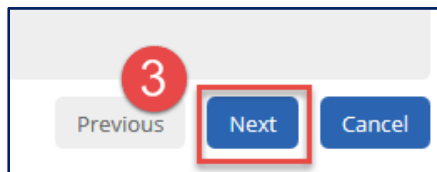
LAST ACTIVE DATE

Q SEARCH **CLEAR**

Client ID	Client Name	Supervisor	Select
13895412	Callaghan, Alexandra		<input type="radio"/>
23632316	Chapman, Arnold		<input checked="" type="radio"/>
1598878	Feld, Frank		<input type="radio"/>

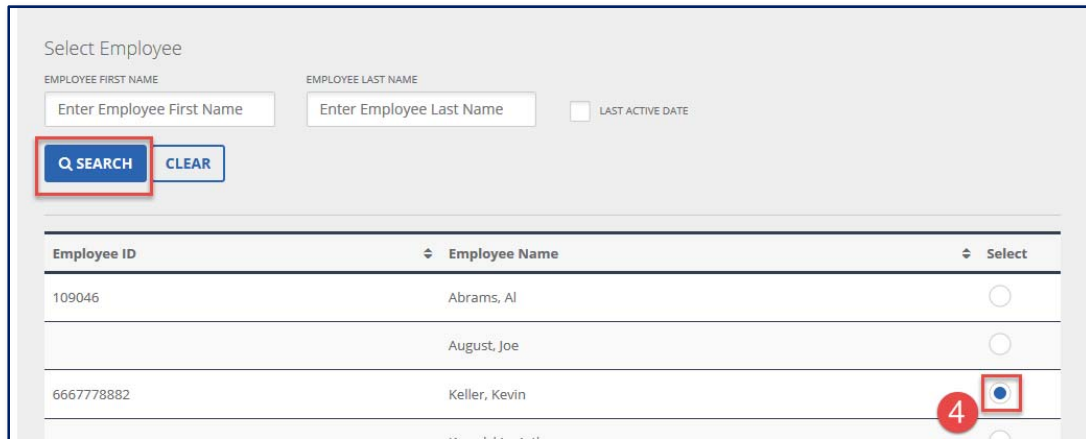
2

3. Click **Next**.



3 Previous **Next** Cancel

4. Search for and select an employee.



Select Employee

EMPLOYEE FIRST NAME: Enter Employee First Name

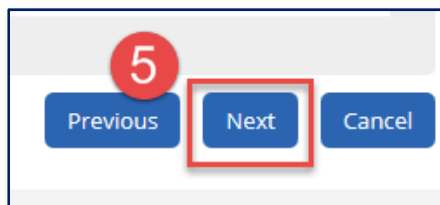
EMPLOYEE LAST NAME: Enter Employee Last Name

LAST ACTIVE DATE

Q SEARCH CLEAR

Employee ID	Employee Name	Select
109046	Abrams, Al	<input type="radio"/>
	August, Joe	<input type="radio"/>
6667778882	Keller, Kevin	<input checked="" type="radio"/>

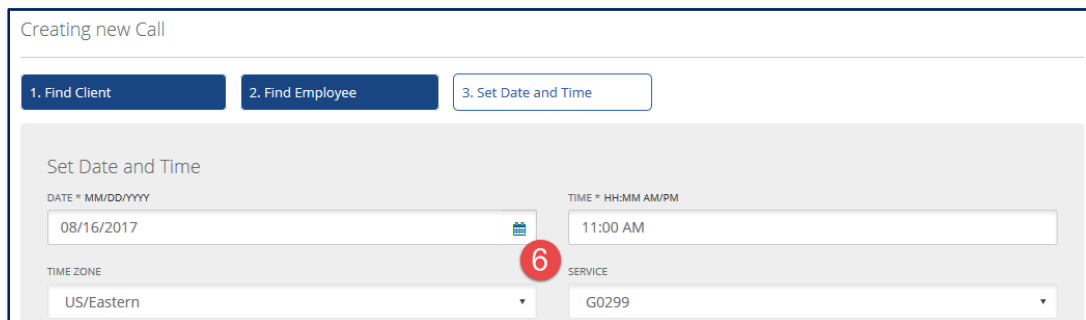
5. Click **Next**.



5

Previous **Next** Cancel

6. Enter the **DATE***, **TIME*** and **SERVICE** details.



Creating new Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY: 08/16/2017

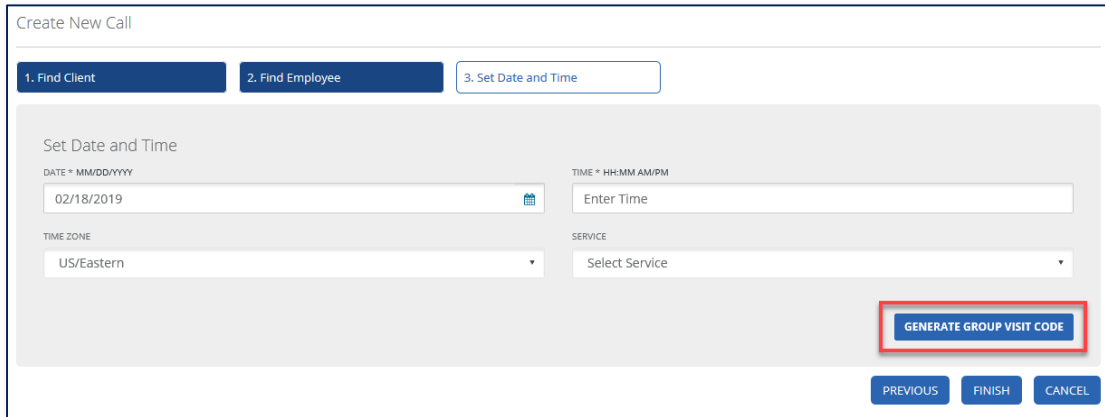
TIME * HH:MM AM/PM: 11:00 AM

TIME ZONE: US/Eastern

SERVICE: G0299

6

If creating a group visit call, click the **GENERATE GROUP VISIT CODE** button to obtain a group visit number.



Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY: 02/18/2019

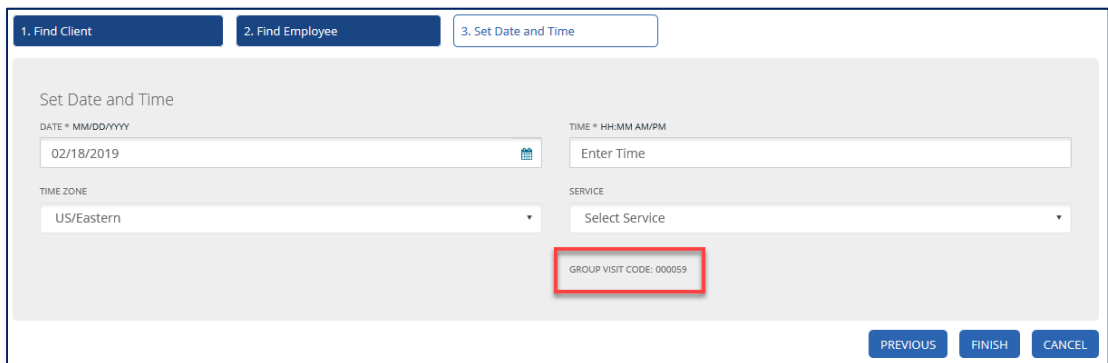
TIME * HH:MM AM/PM: Enter Time

TIME ZONE: US/Eastern

SERVICE: Select Service

GENERATE GROUP VISIT CODE

PREVIOUS FINISH CANCEL



1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY: 02/18/2019

TIME * HH:MM AM/PM: Enter Time

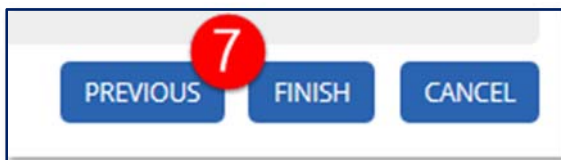
TIME ZONE: US/Eastern

SERVICE: Select Service

GROUP VISIT CODE: 000059

PREVIOUS FINISH CANCEL

7. Click **FINISH**.



PREVIOUS **7** FINISH CANCEL

10 Billing Module

Module Time

30 minutes

This lesson teaches how billing is performed in Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- Review the confirmed visits for billing
- Create invoices
- Export invoices

Introduction

The Billing Module allows system users to create and submit invoices.

Accessing Billing Module

A system user with the appropriate permissions will see the Billing link listed in the Navigation panel on the left side of the screen. Clicking on the link will launch the *Select a Visit* screen.

Getting Ready to Bill

Beginning the Billing Process

Before preparing to bill, you need to make sure the items have the status of 'OK to bill', by meeting the following criteria:

1. Valid authorization.
2. Schedule matches the authorization.
3. Service was provided according to the authorization.
4. Encounter (call in/call out) matches schedule or, if there was an exception, the encounter was manually confirmed and documented.

Billing Workflow

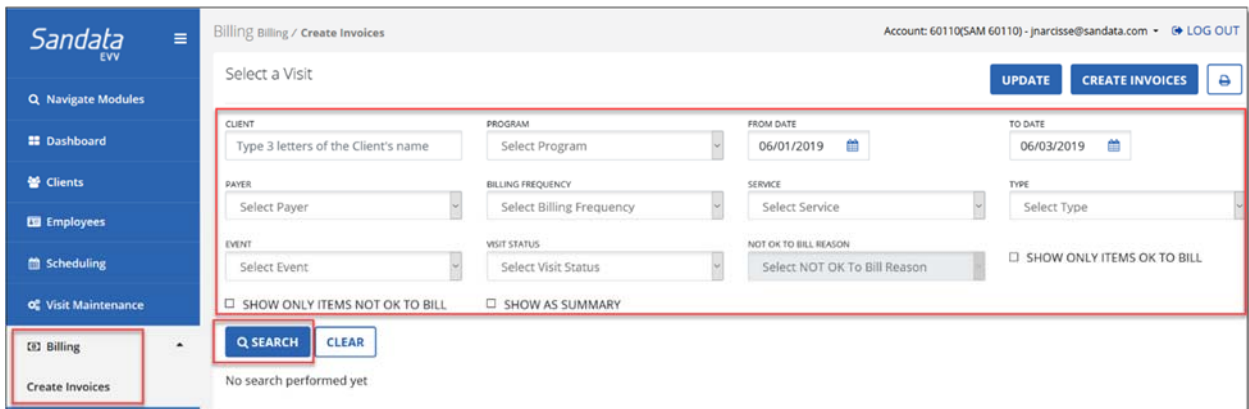
Schedules are automatically confirmed in Sandata EVV as TVV or SMC calls come in.



Searching for items to bill

The Create Invoices screen displays all billable events that have been scheduled for the date range selected. The search filters at the top of the screen allow you to narrow the Results area to meet specific criteria.

1. Click **BILLING > CREATE INVOICES**.
2. Enter the appropriate search criteria.
3. Click **SEARCH**.




Note that by default, the billable and non-billable events for the current month will be displayed if you click **SEARCH** or press **ENTER** without entering any other search criteria.



To edit any of the schedules in the Results area, click the **EDIT** () icon.

Showing 1-10 of 24 entries

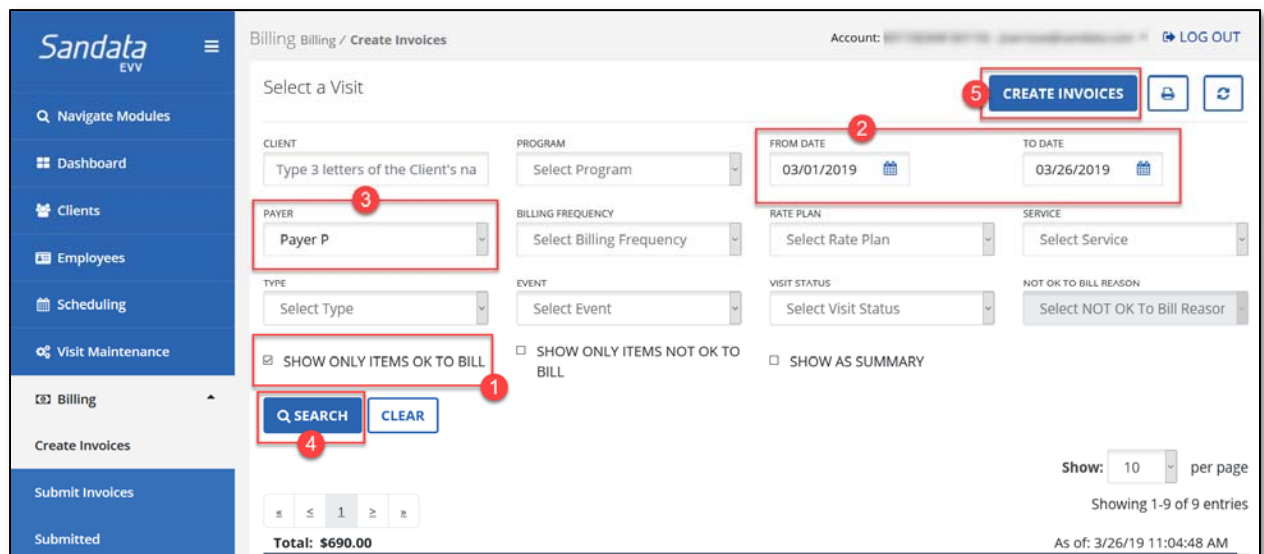
Total: \$2,750.00 As of: 3/26/19 12:40:16 PM

Date	Client	Program	Medicaid ID	Service-Unit Type	Amount	Auth #	Status	Payer	Not Ok To Bill Reason
 3/1/19		P1		1021Z-Unit	\$80.00	00130013-01	04- Billed	Payer P	
 3/1/19		P1		1021Z-Unit	\$80.00	00130013-01	04- Billed	Payer P	

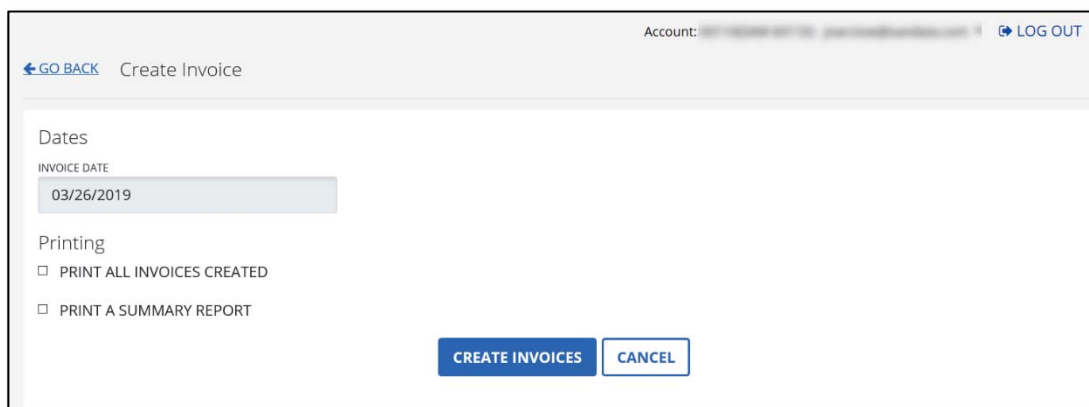
Creating an Invoice

To create an invoice, you need to filter your results to only show items OK to Bill, Payer, and a date range/billing period. Selecting the Show Only Items Ok to Bill checkbox will only display visits with a status of **02- Confirmed** that have all required authorization information.

1. Select the **SHOW ONLY ITEMS OK TO BILL** checkbox.
2. Select the date range/billing period.
3. Filter by the appropriate payor and any other desired filter options.
4. Click **SEARCH**.
5. Click **CREATE INVOICES**.



6. The *Create Invoice* screen displays. The invoice date defaults to the current day's date.



- I. **Print All Invoices Created:** Selecting this check-box will display all invoices generated in a printable PDF format after the creation process is completed.

PLEASE DO NOT STAPLE IN THIS AREA

[REDACTED] ODP 53

[REDACTED]

[REDACTED]

[REDACTED]

PICA [] [] [] HEALTH INSURANCE CLAIM FORM PICA [] [] []

1. MEDICARE <input type="checkbox"/> (Medicare #) MEDICAID <input type="checkbox"/> (Medicaid #) TRICARE CHAMPUS <input type="checkbox"/> (Beneficiary's BEN) CHAMPVA <input type="checkbox"/> (VA File #) GROUP HEALTH PLAN <input type="checkbox"/> (BEN or ID) FECA BLK LUNG <input type="checkbox"/> (BEN) OTHER <input checked="" type="checkbox"/> (ID)		1a. INSURED'S I.D. Number (FOR PROGRAM IN ITEM 1) 7894154	
2. PATIENT'S NAME (Last Name, First Name, Middle Int) Ford, Jessie		4. INSURED'S NAME (Last Name, First Name, Middle Int) Ford, Jessie	
3. PATIENT'S BIRTH DATE MM DD YY 08 10 1947 M <input type="checkbox"/> F <input type="checkbox"/>		7. INSURED'S ADDRESS (no. Street)	
5. PATIENT'S ADDRESS (no. Street)		6. PATIENT RELATIONSHIP TO INSURED Self <input checked="" type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other <input type="checkbox"/>	
CITY STATE		CITY STATE	
ZIP CODE TELEPHONE (Include Area Code)		ZIP CODE TELEPHONE (Include Area Code)	
9. OTHER INSURED'S NAME (Last name, First name, Middle Initial)		10. IS PATIENT'S CONDITION RELATED TO:	
a. OTHER INSURED'S POLICY OR GROUP NUMBER		a. EMPLOYMENT? (CURRENT OR PREVIOUS) <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
b. OTHER INSURED'S DATE OF BIRTH SEX M <input type="checkbox"/> F <input type="checkbox"/>		b. AUTO ACCIDENT? PLACE (State) <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
c. EMPLOYER'S NAME OR SCHOOL NAME		c. OTHER ACCIDENT? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
d. INSURANCE PLAN NAME OR PROGRAM NAME ODP		10d. RESERVED FOR LOCAL USE	
11. INSURED'S POLICY OR GROUP NUMBER		11. INSURED'S DATE OF BIRTH SEX 08 10 47 M <input type="checkbox"/> F <input type="checkbox"/>	
12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE I authorize the release of any medical or other information necessary to process this claim. I also request payment of government benefits either to myself or to the party who accepts assignment below. SIGNED Signature On File DATE		b. EMPLOYER'S NAME OR SCHOOL NAME	
14. DATE OF CURRENT ILLNESS (First Symptom) OR INJURY (Accident) OR PREGNANCY (LMP) 02 15 19		c. INSURANCE PLAN NAME OR PROGRAM NAME	
15. IF PATIENT HAS HAD SAME OR SIMILAR ILLNESS		d. IS THERE ANOTHER HEALTH BENEFIT PLAN? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO IF yes, return to item 9 a-d.	
17. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE		13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE I authorize payment of medical benefits to the undersigned physician or supplier for the services described below. SIGNED Signature On File	
17a. ID 4545454545		16. DATES PATIENT UNABLE TO WORK IN CURRENT OCCUPATION FROM TO	
17b. NPI		18. HOSPITALIZATION DATES RELATED TO CURRENT SERVICES FROM TO	
19. RESERVED FOR LOCAL USE		20. OUTSIDE LAB? \$ CHARGES <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
21. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. (RELATED ITEMS 1, 2, 3 OR 4 TO ITEM 24E BY LINE) 1 _____ 3 _____ 2 _____ 4 _____		22. MEDICAID RESUBMISSION CODE ORIGINAL REF. NO.	
24. A DATE(S) OF SERVICE From MM DD YY To MM DD YY B Place of Service C Type of Service D PROCEDURES, SERVICES, OR SUPPLIES (Explain Unusual Circumstances) CPT/HCPCS MODIFIER E DIAGNOSIS CODE F \$ Charges G Days of Units H EPSDT Family Plan I ID. QUAL J RENDERING PROVIDER ID. #		23. PRIOR AUTHORIZATION NUMBER 555999-02	
06 02 19 06 02 19		10212 1 105 00 20.00 4545454545 1497123392	

- II. **Print a Summary Report:** Selecting this check-box will display a summary report of the invoices created. This report can be used as a sales register.

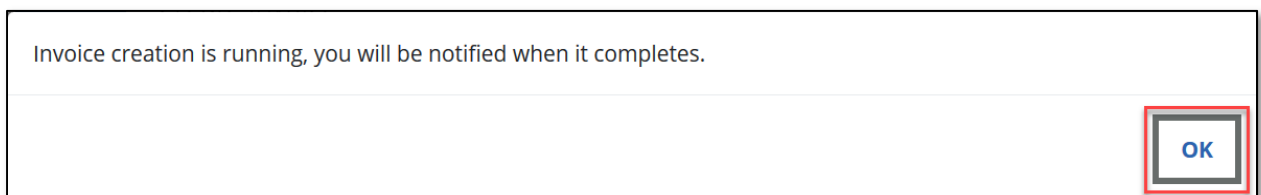
Billing Entries						
Date	Client	Chart ID	Invoice	Orig. Amount	Amount	Balance
ODP						
06/13/19	Ford, Jessie	PW0879350-P1	53	\$105.00	\$105.00	\$105.00
ODP Totals:				\$105.00	\$105.00	\$105.00
Grand Totals :				\$105.00	\$105.00	\$105.00

7. Click **CREATE INVOICES**.



8. You will receive a message stating the invoice creating is running, you will be notified when it completes.

9. Click **OK**.








10. Another message displays stating invoice creation process is finished.

11. Click **OK**.





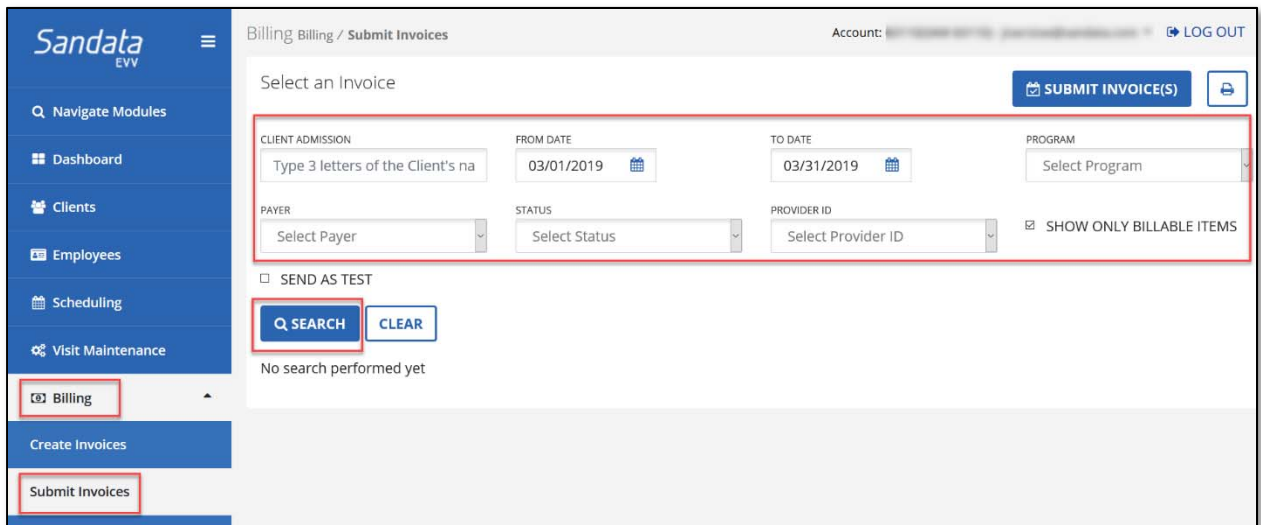
Exercise: Creating an Invoice

Task	Description
1.	Click the <i>Billing Module</i> from the navigation panel and then click <i>Create Invoices</i> .
2.	Select the <input checked="" type="checkbox"/> SHOW ONLY ITEMS OK TO BILL checkbox.
3.	Select the date range/billing period.
4.	Filter by the appropriate payor and any other desired filter options.
5.	Click  .
6.	Click  . The Create Invoice screen displays.
7.	Edit the invoice date if needed.
8.	Click  . You will receive a message stating the invoice creation is running, you will be notified when it completes.
9.	Click  .
10.	Another message displays stating invoice creation process is finished. Click  .

Searching for Created Invoices


The Select an Invoice screen displays all invoices that will be submitted to the Payers for the date range selected. The search filters at the top of the screen allow you to narrow the Results area to meet specific criteria.

1. Click **BILLING > SUBMIT INVOICES**.
2. Enter the appropriate search criteria.
3. Click **SEARCH**.



Note that by default, the created invoices for the current month will be displayed if you click **SEARCH** or press **ENTER** without entering any other search criteria.



To edit any of the invoices in the Results area, click the **EDIT** () icon.

Showing 1-3 of 3 entries

Invoice Date	Client	Program	Medicaid ID	Invoice No	Items	Amount	Balance	Status	Last Status Change Date	Resubmitted	Copay
 3/26/19		P1		15	1	\$50.00	\$50.00	05-Billable	3/26/19	No	
 3/26/19		P1		14	3	\$480.00	\$480.00	05-Billable	3/26/19	No	

Submitting Invoices

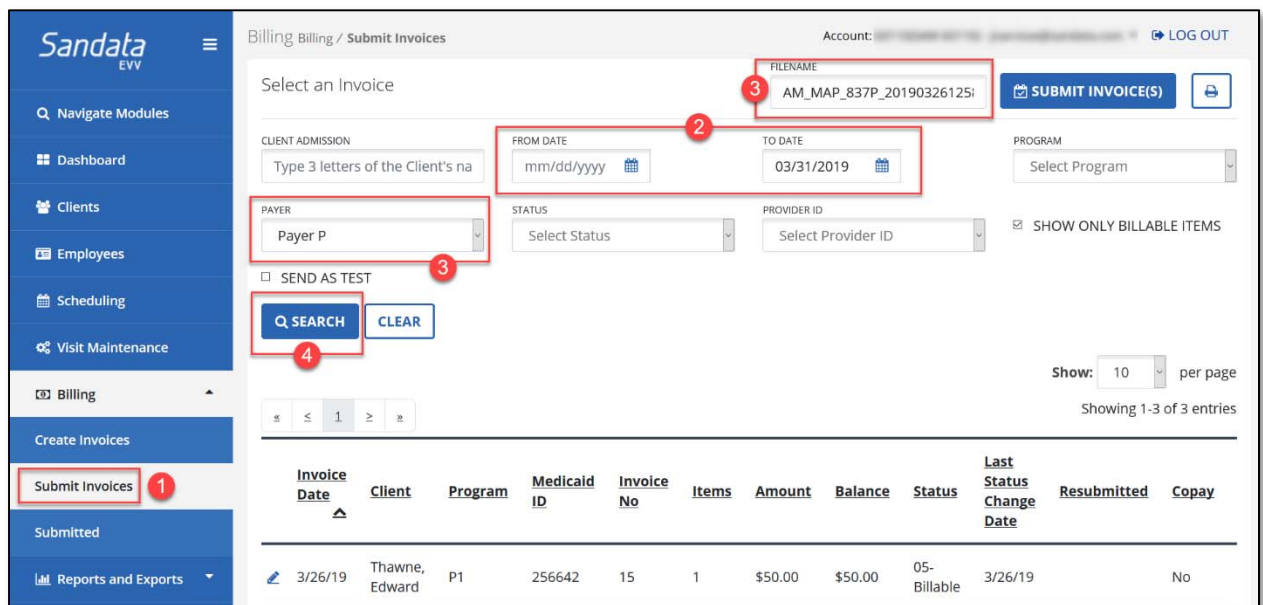
The purpose of submitting invoices is to create an electronic file that will be submitted to the Payers on your behalf.

1. Click **BILLING > SUBMIT INVOICES**.
2. The *Select an Invoice* screen displays. Select a Date Range. This date range looks at the invoice date.



Best practice is to leave the **FROM DATE** field blank. This will pick up any visits that have been invoiced previously but not yet submitted.

3. Select a Payer. This will populate the **FILENAME**.
4. Click **SEARCH**.



The screenshot shows the 'Billing / Submit Invoices' screen. The 'PAYER' dropdown is set to 'Payer P', and the 'FILENAME' field contains 'AM_MAP_837P_201903261251'. The 'FROM DATE' field is empty, and the 'TO DATE' field is set to '03/31/2019'. The 'SEARCH' button is highlighted with a red box and a '1' in a red circle. The table below shows one invoice entry:

Invoice Date	Client	Program	Medicaid ID	Invoice No	Items	Amount	Balance	Status	Last Status Change Date	Resubmitted	Copay
3/26/19	Thawne, Edward	P1	256642	15	1	\$50.00	\$50.00	05-Billable	3/26/19	No	

5. Click **SUBMIT INVOICE(S)**.



6. A message will display stating “Do you want to export the invoices matching searched parameters?”. Click **OK**.

Confirm

Do you want to export the invoices matching searched parameters?


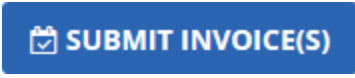



7. Another message will display stating “Download file?”. Click **OK** to download the file. Click **CANCEL** for the invoice(s) to be submitted electronically.

Confirm

Download file?



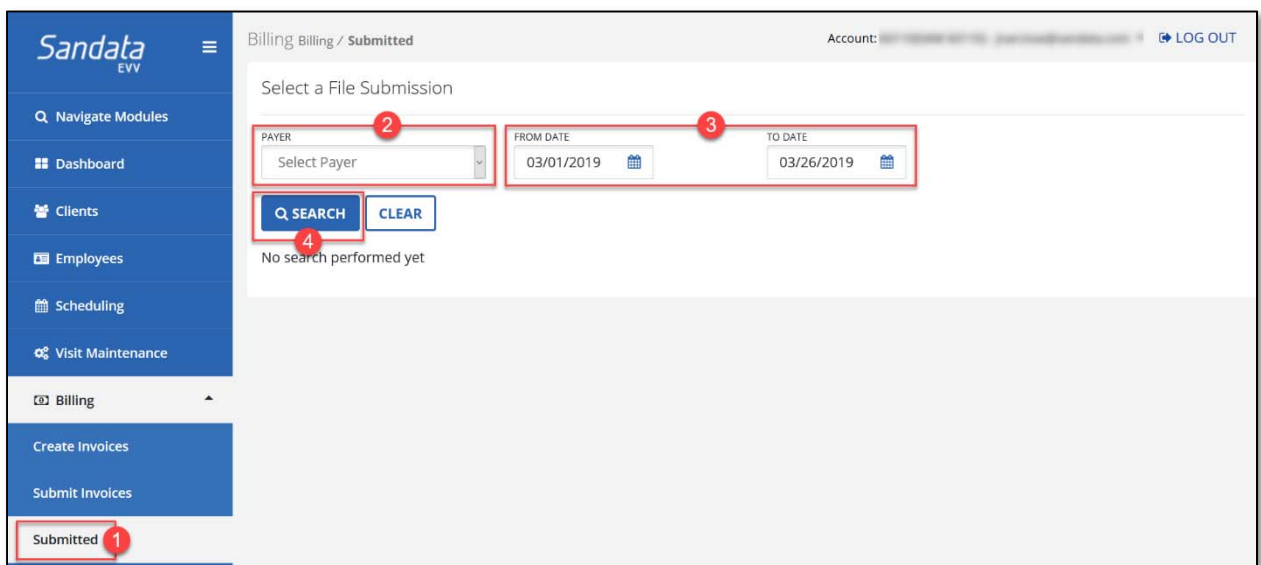
Exercise: Submit an Invoice

Task	Description
1.	Click the <i>Billing Module</i> from the navigation panel and then click <i>Submit Invoices</i> .
2.	The Select an Invoice screen displays. Select a Date Range. This date range looks at the invoice date.
3.	Select a Payer. This will populate the FILENAME.
4.	Click  .
5.	Click  .
6.	A message will display stating “Do you want to export the invoices matching searched parameters?”. Click  .
7.	Another message will display stating “Download File?”. Click  to download the file. Click  for the invoice (s) to be submitted electronically.

Submitted Billing Exports

The *Select a File Submission* screen allows system users to view electronically submitted billing exports within a specified date range.

1. Click **BILLING > SUBMITTED**.
2. Select a Payer.
3. Enter the Date Range, **FROM DATE** and **TO DATE**.
4. Click **SEARCH**.



5. Click on a Filename in the Results area.

Filename	Export	Payer
AM_MAP_837P_20190326134726_064_6CT8_P.EDI	3/26/19 (64)	Payer P

6. A dialog box displays showing the invoice export date, the number of records, and the invoice details such as invoice date, client name, invoice number, items, and amount.
7. To review the raw data of the export, click the **RAW FILE** tab.

AM_MAP_837P_20190326134726_064_6CT8_P.edi

- Date: 3/26/19
- Records: 2

Claims [Raw File](#)

Date	Client	Program	Invoice	Items	Amount
3/26/19	[REDACTED]		000000014	3	\$480.00
3/26/19	[REDACTED]		000000016	4	\$640.00

ROLLBACK CLOSE

AM_MAP_837P_20190326134726_064_6CT8_P.edi

- Date: 3/26/19
- Records: 2

Claims [Raw File](#)

```

1  ISA*00* *00* *ZZ*209123414 *ZZ*555558161 *190326*1347*;*00501*000000064*1*P*;-
2  GS*HC*ASC*555558161*20190326*1347*999908064*X*005010X223A2~
1  ST*837*19002613*005010X223A2~
2  BHT*0019*00*19002613*20190326*134726*CH~
3  NM1*41*2*COMPANY 1*****46*209123414~
4  PER*IC*IT SUPERVISOR*TE*5164844400~
5  NM1*40*2*PAYER P*****46*555558161~
6  HL*1**20*1~
7  NM1*85*2*COMPANY 1*****XX*1497123392~
8  N3*26 HARBOR PARK DRIVE~
9  N4*PORT WASHINGTON*NY*110500000~
10 REF*EI*99999999~
11 HL*2*1*22*0~
12 CRP*D*12*****MC~
    
```

ROLLBACK CLOSE




To cancel a previously submitted export file and change the invoice statuses back to Billable, use the **ROLLBACK** button.

A blue rectangular button with the word "ROLLBACK" in white, uppercase letters.A blue rectangular button with the word "CLOSE" in white, uppercase letters.



Exercise: Viewing Submitted Billing Exports

Task	Description
1.	Click the <i>Billing Module</i> from the navigation panel and then click <i>Submitted</i> .
2.	The Select a File Submission screen displays. Enter the Payer and Date Range.
3.	Click  .
4.	Click the Filename hyperlink to view the data.
5.	Click the Raw File tab to see the raw data of the claim.

11 Reports

Module Time

20 minutes

This lesson demonstrates how to generate Sandata EVV reports. At the end of the lesson there are report descriptions.

Module Objectives

After completing this lesson, you will be able to:

- access reports;
- use Daily and Date Range reports; and
- sort and filter reports.

Introduction

There are multiple reports available within Sandata EVV. Different users may have access to different reports. When reports are generated, they can either be saved as a portable document file (.pdf), Excel (.xls) or a comma delimited file (.csv).

There are multiple filters that enable the user to retrieve only the data they want to see.

Access Reports

1. Click **Reports & Exports>Reports** on the *Navigation* panel.



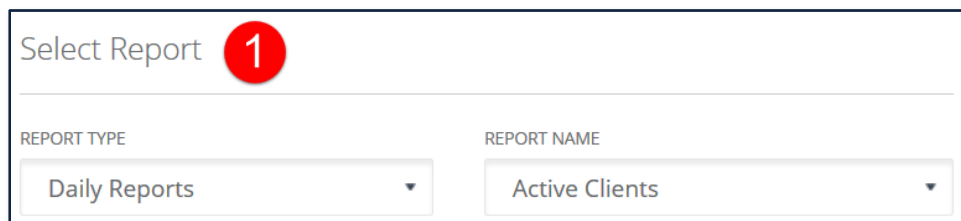
Reports – Main Window Elements

1. **Select Report** Select the **REPORT TYPE** and **REPORT NAME** of the report being run.



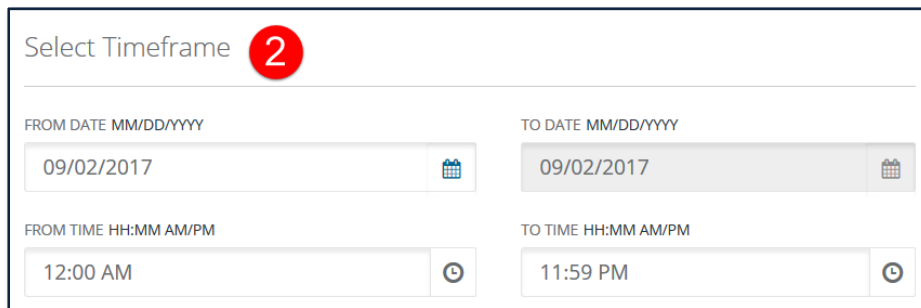
The reports listed in the **REPORT NAME** field change based on the **REPORT TYPE** category selected.

- **Daily:** These reports display results for a selected single date
- **Date Range:** These reports display results for a selected date range

A screenshot of a web form titled 'Select Report'. A red circle with the number '1' is next to the title. Below the title are two dropdown menus. The first is labeled 'REPORT TYPE' and has 'Daily Reports' selected. The second is labeled 'REPORT NAME' and has 'Active Clients' selected.

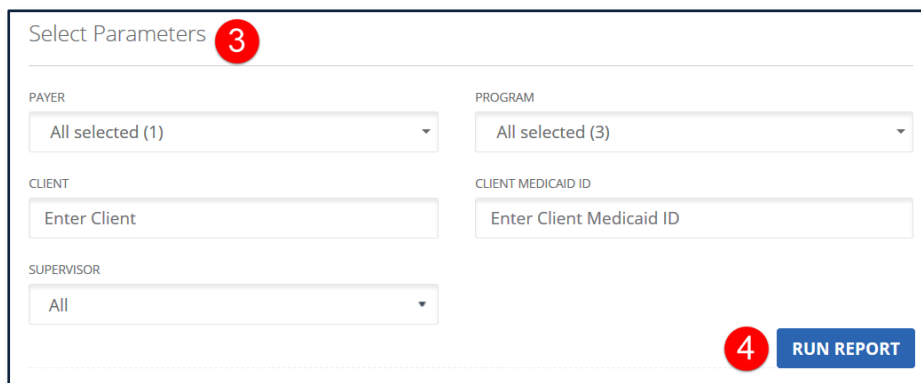
2. **Select Timeframe** Select the time and/or date range of the reports being run.

Filter	Description
FROM DATE	Enter the beginning date of the date range
TO DATE	Enter the ending date of the date range
FROM TIME	Enter the beginning time of the timeframe
TO TIME	Enter the ending time of the timeframe



3. **Select Parameters** Various search options are made available for the user to further limit the report results. Depending on the report selected, the parameters can differ. Common filters include, but are not limited to:

Filter	Description
PAYER	List of payers
PROGRAM	List of programs
CLIENT	Search for the client by last name or client ID
CLIENT MEDICAID ID	Enter the client’s Medicaid ID number



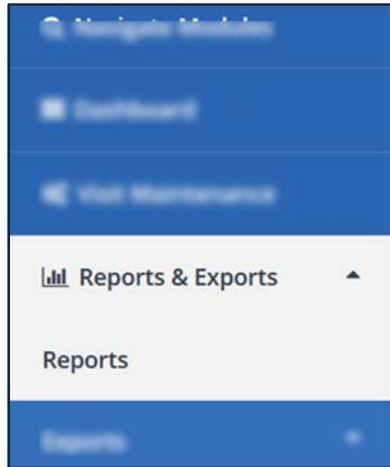
4. **Run Report** Runs the report based upon the selected criteria.

Running a report

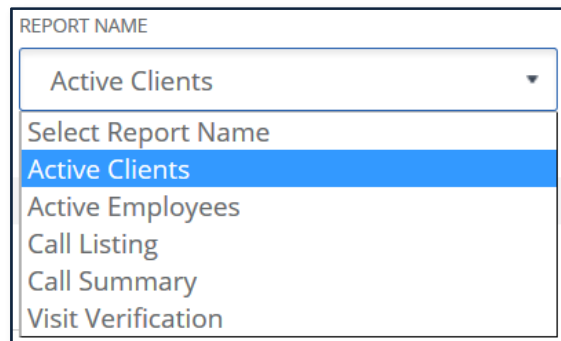
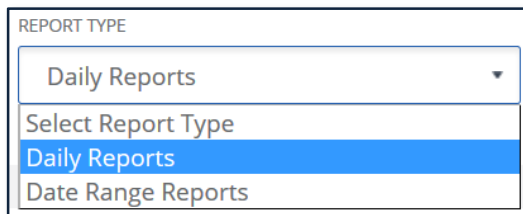


Follow along with the instructor to run a report.

1. Click **Reports & Exports>Reports** from the *Navigation* panel. The *Reports* screen displays.



2. Select the **REPORT TYPE** and **REPORT NAME**.



Available reports differ depending upon which report type is selected.

3. Enter **Select Timeframe** information.

Select Timeframe

FROM DATE MM/DD/YYYY	TO DATE MM/DD/YYYY
<input type="text" value="09/02/2017"/>	<input type="text" value="09/02/2017"/>
FROM TIME HH:MM AM/PM	TO TIME HH:MM AM/PM
<input type="text" value="09:00 AM"/>	<input type="text" value="03:00 PM"/>



For *Daily* reports, the default is always the current day's date. For *Date Range* reports, the default is the past two (2) weeks. Both types of reports can be filtered further by entering time constraints.

Maximum date range is 730 days.

4. Set the desired search **Parameters**.

Select Parameters

PAYER <input type="text" value="All selected (1)"/>	PROGRAM <input type="text" value="All selected (3)"/>
CLIENT <input type="text" value="Enter Client"/>	CLIENT MEDICAID ID <input type="text" value=""/>



If there is more than one Payer, select from the drop-down list. Neither the **PROGRAM** nor **SUPERVISOR** fields are necessary to run the report. **CLIENT** or **CLIENT MEDICAID ID** narrows the results to just that client.



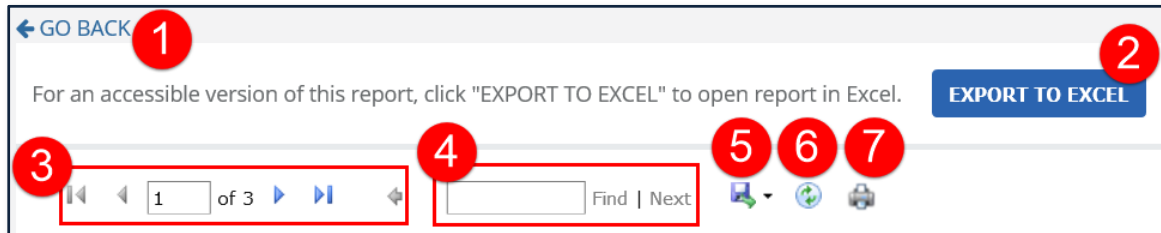
Parameters vary based on the report selected.

To reduce the size of the report and ensure efficiency when running reports with longer date ranges or containing lots of data, it is best to select other parameters such as: **CLIENT** or **CLIENT MEDICAID ID**.

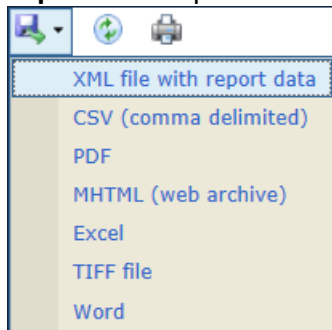
5. Click **Run Report**. The *Preview Report* screen opens.



Navigating a Report



1. **Go Back:** This link closes the *Preview Report* screen and re-displays the report search parameters.
2. **EXPORT TO EXCEL:** This button produces an accessible version of the report in Microsoft Excel.
3. **Page Navigation:** This section will display the current page vs. the total number of pages. Navigate to a specific page by typing a number into the current page field and pressing **<Enter>**. The arrows can be used to navigate to the first, next, previous and last page.
4. **Search Functionality:** Allows you to find data on any page in the report. The **Next** button jumps to the next instance of the search criteria within the document.
5. **Export:** The report can be exported into several formats:



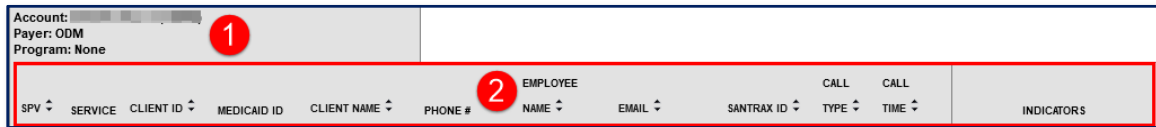
If all report data is to be in a single table, export as CSV (comma delimited) and open in MS Excel.

6. **Refresh:** Re-runs the report and renews the displayed data.
7. **Print:** Use this button to print the report.




Firefox and Chrome users should export the report to PDF and use the PDF print tools.



Sorting a Report



1. **Report Grouping Tab:** This tab displays general information pertaining to the report as well as the sections for grouped reports.
2. **Column Header:** Clicking a column's header will sort the results in either ascending or descending order based on that column's content.



If the column header has no arrow () next to it, the column cannot be sorted.

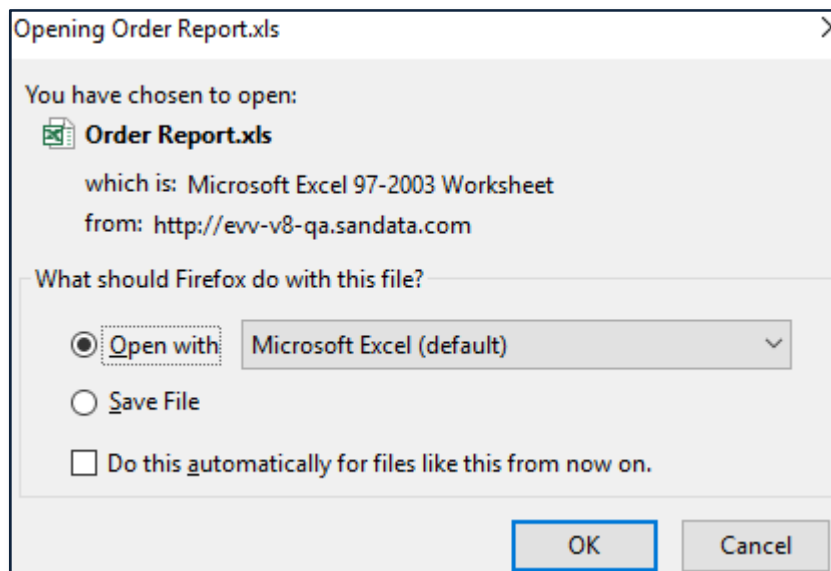
When a column is sorted, a visual indicator ( / ) reveals which column and in which order it is sorted.

Export a Report

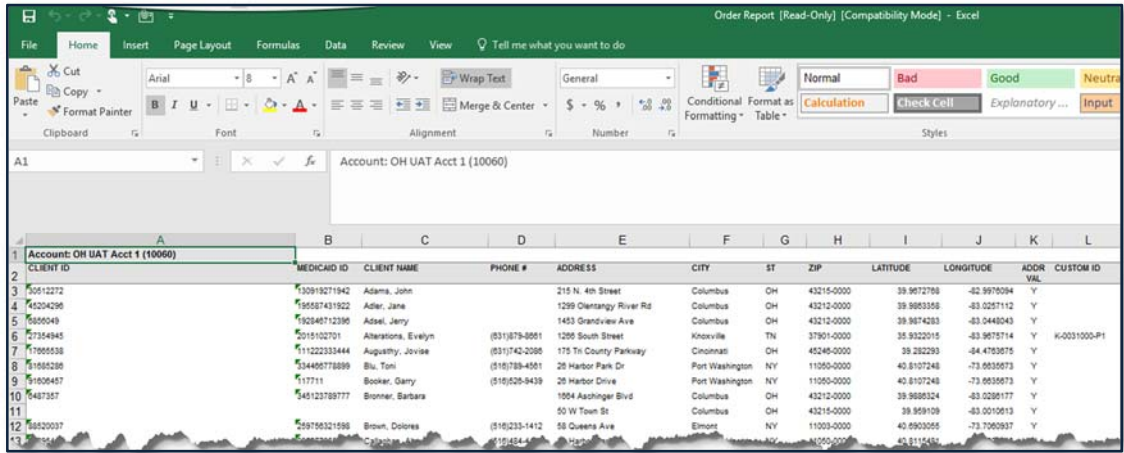


Follow along with the instructor to export a report.

1. Click **EXPORT TO EXCEL**. The *Opening Order Report.xls* dialog box opens.



- Click **OK** to export the file. The report opens in Microsoft Excel.



CLIENT ID	MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	ADDR VAL	CUSTOM ID
50512272	530919271942	Adams, John		215 N. 4th Street	Columbus	OH	43215-0000	39.9672796	-82.9976094	Y	
45204296	595587431922	Adler, Jane		1299 Orientangy River Rd	Columbus	OH	43212-0000	39.9803356	-83.0257112	Y	
8626049	592646712396	Adsel, Jerry		1433 Grandview Ave	Columbus	OH	43212-0000	39.9674293	-83.0446043	Y	
27254945	5215102701	Abernethy, Evelyn	(83)879-8861	1209 South Street	Knoxville	TN	37901-0000	35.9322015	-83.9675714	Y	K-0031000-P1
77605538	51122233444	Aguatry, Jovise	(83)1742-2096	175 Tri County Parkway	Cincinnati	OH	45246-0000	39.282293	-84.4193875	Y	
51665268	534466778899	Blu, Tom	(516)789-4561	26 Harbor Park Dr	Port Washington	NY	11050-0000	40.8107246	-73.6636873	Y	
51600467	517711	Booker, Gary	(516)526-9439	26 Harbor Drive	Port Washington	NY	11050-0000	40.8107246	-73.6636873	Y	
5487357	543123789777	Bronner, Barbara		1004 Ashinger Blvd	Columbus	OH	43212-0000	39.8686324	-83.0269177	Y	
65820037	598796321598	Brown, Dolores	(516)233-1412	50 W Town St	Columbus	OH	43215-0000	39.9691029	-83.0010913	Y	
51614	598796321598	Brown, Dolores	(516)233-1412	58 Queens Ave	Elmont	NY	11003-0000	40.6903055	-73.7060997	Y	
51614	598796321598	Brown, Dolores	(516)233-1412	58 Queens Ave	Elmont	NY	11003-0000	40.6903055	-73.7060997	Y	



On Your Own: Run the Client Summary Report

Sample Available Reports

Role and security level determine the reports available. The reports support monitoring of visits in the field to ensure that clients are receiving the services as required. The reports also help put together the missing pieces in Visit Maintenance.

Daily Reports

1. **Active Client Report:** This report lists all active clients as of the date selected.



Use this report to view all client’s phone numbers, active addresses, identify whether or not an address was verified by GPS, the Medicaid ID (for SMC). Client ID (for TVV) and the custom ID field for cross reference.

ACTIVE CLIENTS											
<small>Report Parameters Account: 10060 For: 9/1/2017 - 9/1/2017 11:59:59 PM</small>											
<small>Account: OH UAT Acct 1 (10060)</small>											
CLIENT ID	MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	ADDR VAL	CUSTOM ID
100001	100001001	John Doe	555-555-5555	123 Main St	Columbus	OH	43210	83.000000	83.000000	1	
100002	100001002	Jane Doe	555-555-5556	456 Market St	Columbus	OH	43211	83.000000	83.000000	1	
100003	100001003	Bob Smith	555-555-5557	789 Grand Ave	Columbus	OH	43212	83.000000	83.000000	1	
100004	100001004	Charlie Brown	555-555-5558	101 Park Blvd	Columbus	OH	43213	83.000000	83.000000	1	
100005	100001005	Alice White	555-555-5559	202 Hill St	Columbus	OH	43214	83.000000	83.000000	1	

2. **Active Employees Report:** This report displays all active employees for the selected date. The report displays the employee ID, employee name, employee email address, phone number and Santrax ID.



Use this report to view current employee information and review the employee email address (for SMC) and Santrax ID (for TVV).

ACTIVE EMPLOYEES					
<small>Report Parameters Account: 10060 OH UAT Acct 1 For: 9/1/2017 - 9/1/2017 11:59:59 PM</small>					
<small>Account: OH UAT Acct 1 (10060)</small>					
EMPLOYEE ID	EMPLOYEE NAME	EMAIL	SANTRAX ID	PHONE	DEP
100001	John Doe	john.doe@ohio.gov	100001	555-555-5555	
100002	Jane Smith	jane.smith@ohio.gov	100002	555-555-5556	
100003	Bob Brown	bob.brown@ohio.gov	100003	555-555-5557	
100004	Charlie Green	charlie.green@ohio.gov	100004	555-555-5558	
100005	Alice White	alice.white@ohio.gov	100005	555-555-5559	

3. **Call Listing Report:** This report displays all call activity from all available call methods for the selected day and time range specified. The calls are listed one after another individually with the beginning pages listing calls with missing data.



Use this report to review call activity for the day and time selected. This report allows users to monitor trends in call activity and identify call that require editing, verification or exception handling.

Call Listing											
Report Parameters											
Account: [redacted]											
Payer: None											
Program: None											
For: 8/24/2017 - 8/24/2017 11:59:59 PM											
SPV	SERVICE	CLIENT ID	MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMAIL	SANTRAX ID	CALL TYPE	CALL TIME	INDICATORS
											G
											G
Grand Total of Actual Calls: 2											

8/24/2017 10:59:43 AM Page 1 of 2

4. **Call Summary Report:** This report pairs the Start and End calls and calculates the hours worked.



Use this report to review current visit information on a daily basis and identify the incomplete visits from the previous day that need correction or follow up. This report allows users to monitor trends in call activity and exception handling.

Call Summary											
Report Parameters											
Account: [redacted]											
Payer: None											
Program: None											
For: 8/15/2017 - 8/15/2017 11:59:59 PM											
SERVICE	CLIENT ID	MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMAIL	SANTRAX ID	START	END	HOURS	BILL HRS	
G0150							01:31 PM			14400	+
G0150							11:52 AM	12:07 PM #	0.25	900	+
G0150							01:08 PM	01:13 PM #	0.08	300	
G0150							01:17 PM	01:20 PM #	0.05	180	
G0150							12:22 PM	12:29 PM #	0.12	420	
Total of Bill Hours: 0.50											
Total of Visits: 4											
Grand Total of Billed Hours: 14.47											
Grand Total of Visits: 27											
Grand Total of Completed Visits: 22											

8/24/2017 12:58:30 PM Page 11 of 12

- 5. **Visit Verification Report:** This report provides information for visits on a given date. Reported information for each visit includes all call, adjusted and client verification information.



Use this report to view all information about a visit.

[Report Parameters](#)
 Account: [redacted]
 For: 8/15/2017

Visit Verification Report

Account: [redacted]
 Payer: [redacted]
 Program: None
 Service: None

MEDICAID ID	CLIENT	EMPLOYEE	DATE	ACTUAL			ADJUSTED			BILL HOURS	CLIENT VERIFIED		
				START	END	HOURS	START	END	HOURS		SERVICE	TIME	SIGNATURE
[redacted]	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	11:52 AM	12:07 PM	0.25				0.25			No
	Reason Codes												
	81 (test)												
[redacted]	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	12:22 PM	12:29 PM	0.12				0.12	Yes		Yes
[redacted]	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	01:08 PM	01:13 PM	0.08				0.08	Yes	Yes	No
[redacted]	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	01:17 PM	01:20 PM	0.05				0.05	Yes	Yes	Yes
[redacted]	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	01:31 PM			01:30 PM	05:30 PM	4.00	4.00			No
	Reason Codes												
	81 (test)												


8/24/2017 1:43:58 PM
Page 1 of 2

Date Range Reports

These reports should be run after Visit Maintenance is completed. The corrections made in Visit Maintenance are reflected in these reports.

1. **Client Visit Summary:** This report shows all visits for the selected date range sorted by client, with each client on its own page. Results are sorted per visit, per service. The report includes basic information such as: visit date, Santrax ID, employee name, number of visits, visit start and end time and visit hours.




Use this report to review visit hours and information by client. It is a useful tool to review what service were provided to a client for a given time. It also assists in monitoring trends in the services clients are receiving.

Report Parameters
 Account: [redacted]
 For: 9/28/2017 - 10/12/2017 11:59:59 PM

Client Visit Summary

ACCOUNT: [redacted]
 PAYER: [redacted]
 SPV: [redacted]
 CLIENT ID: [redacted]
 MEDICAID ID: [redacted]
 CLIENT NAME: [redacted]

PROGRAM	SERVICE	SANTRAX ID	EMAIL	EMPLOYEE	VISIT DATE	START	END	# OF VISITS	HOURS
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	10/02/17	11:37 AM	11:39 AM	1	0.03
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	10/02/17	11:42 AM	11:44 AM	1	0.03
Client/Date Sub-Total:								2	0.07
Client Totals:								2	0.07

 Sandata
10/12/2017 8:00:57 AM
Page 1 of 3

2. **Detail Visit Status Report:** This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee

information pertaining to the visit with the visit details such as, exceptions, services, date, time and the actual/adjusted call-in and call-out times.



Use this report to review a detailed overview of all visits within a selected date range. It assists in easily identifying visits that have statuses that need to be corrected. The report can also be printed based on exceptions or visits that need exception handling in order to get them to a verified status for claims validation.

Report Parameters
Account: [redacted]
For: 8/11/2017 - 8/11/2017 11:59:59 PM
: All

Detail Visit Status Report

Account: [redacted]
Payer: None
Program: None
SPV: None
Status: Incomplete

Visit ID	Medicaid ID	Client	Employee	Service	Date	Scheduled		Call		Adjusted		Exceptions
						Start	End	In	Out	In	Out	
1763805090			Doe, John		08/11/2017			10:22 AM				Unknown Clients, Visits Without In-Calls
1763805512			Doe, John		08/11/2017			10:25 AM				Client Signature Exception, Service Verification Exception, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
1763820813			Mir, Roman		08/11/2017			11:30 AM				Client Signature Exception, Missing Service, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
Sub Total # of Visits: 3												

8/11/2017 12:53:45 PMPage 3 of 4

- Summary Visit Status Report:** This report is a summary view of the status of all visits based on the selected date range and parameters. The results are grouped by the duration of time each visit has remained in the same status. It shows visits in a 31 day or monthly range.




Use this report to review the status of all visits within a selected date range at a summary level. The report provides an easy way to quickly identify those visits requiring exception handling. When visits are identified, users can run a more detailed report for that specific visit to identify and correct exceptions.

Report Parameters
Account: [redacted]
For: 8/11/2017 - 8/14/2017 11:59:59 PM

Summary Visit Status Report

Account: [redacted]
Payer: ODM
Program: None

Status	Age					Total #
	<1 Days	1 - 5 Days	6 - 10 Days	11 - 15 Days	16 - 21 Days	
In Process	0	0	0	0	0	0
Incomplete	0	12	0	0	0	12
Verified	0	15	0	0	0	15
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
Total #	0	27	0	0	0	27

8/14/2017 9:51:25 AMPage 1 of 2

- Authorization Summary Report:** This report displays a summary of client authorizations sorted by payer. Authorizations specify the number of units, visits, or hours for a service and time period.



Use this report to review used and available units for authorizations in the selected date range. This can be useful for requesting additional authorizations.

Authorization Summary											Report Parameters	
											Account: 60110 For: 05/29/2019 12:00 AM - 06/12/2019 11:59 PM Payer: All Program: All Supervisor: All	
CLIENT	PROGRAM	MEDICAID ID CASE MGR	SOC	SERVICE	EC	REF NO	TOTAL	UNUSED	FROM	TO	LIMITATION	FORMAT
Payer: Medicaid Fee for Service												
America, Captain	FHH	01201991	06/05/2019	10212	DEF	123456789	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Arena, Susan	FHH	564747575435353254	06/05/2019	10212	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Arena, Susan	FHH	564747575435353254	06/05/2019	12062	DEF	Not present	0.00	0.00	06/05/2019	06/05/2019	None	Hour
Arena, Susan	FHH	564747575435353254	06/05/2019	10212	DEF	Not present	0.00	0.00	06/05/2019	06/05/2019	None	Hour
Arena, Susan	FHH	564747575435353254	06/05/2019	12062	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Crafto, Michael W.	FHH	975312468	06/04/2019	10212	DEF	MWC-2	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Freely, I P	FHH	1357908642	06/05/2019	12142	DEF	MWC-1	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Jessup, Nathan	FHH	999888777	06/05/2019	10212	DEF	212121	10.00	9.00	06/05/2019	12/31/2019	None	Hour
Liguori, Linda	FHH	456457456756	06/05/2019	10212	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Liguori, Linda	FHH	456457456756	06/05/2019	12062	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Pitt, Brad	FHH	987099123		10212	DEF	B-0987	0.00	0.00	06/05/2019	08/15/2019	None	Hour
QA_H_FI, Christinao	FHH	AMpfksd118472893423	05/01/2019	12142	DEF	Not present	0.00	0.00	05/01/2019	01/31/2020	None	Unit
Smith, John	FHH	234562378	06/05/2019	10212	DEF	56478	0.00	0.00	06/05/2019	12/06/2019	None	Hour
Smith, Kawhi A.	FHH	582956578	04/01/2019	12102	DEF	000061258974	250.00	240.25	06/05/2019	08/31/2019	None	Hour
Snow, Phoebe	FHH	ss22331q	06/02/2019	10212	DEF	12345232423erreff	0.00	0.00	06/02/2019	12/06/2019	None	Hour
Stark, Tony	FHH	123456789012		10212	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Wayne, Bruce	FHH	1212123	06/06/2019	10212	DEF	35342554	0.00	0.00	06/05/2019	10/05/2019	None	Hour
Wunder, Buster	FHH	89721	06/05/2019	10212	DEF	90761	420.00	420.00	06/05/2019	01/31/2020	None	Hour
Sub Totals:	Clients: 14					Auths: 18						

- Changed Authorizations Report:** This report shows changes that have been made to existing authorizations.



Use this report to review authorizations that have had changes within a specific time and date range.

Report Parameters
Account: 60110
For: 05/29/2019 12:00 AM - 06/12/2019 11:59 PM
Payer: All
Program: All

Changed Authorizations

CLIENT	PROGRAM	MEDICAID ID	SOC	AUTH REF NO.	SERVICE	DATE CHANGE OCCURRED
Payer: Medicaid Fee for Service						
America, Captain	FHH	01201991	06/05/2019	123456789	10212	06/06/2019
America, Captain	FHH	01201991	06/05/2019	123456789	10212	06/06/2019
Arena, Susan	FHH	564747575435353254	06/05/2019		1206Z	06/06/2019
Arena, Susan	FHH	564747575435353254	06/05/2019		10212	06/06/2019
Crafto, Michael W.	FHH	975312468	06/04/2019	MWC-2	10212	06/06/2019
Freely, I.P.	FHH	13579008642	06/05/2019	MWC-1	1214Z	06/06/2019
Freely, I.P.	FHH	13579008642	06/05/2019	MWC-1	1214Z	06/06/2019
Freely, I.P.	FHH	13579008642	06/05/2019	MWC-1	1214Z	06/06/2019
Freely, I.P.	FHH	13579008642	06/05/2019	MWC-1	1214Z	06/06/2019
Jessup, Nathan	FHH	999888777	06/05/2019	212121	10212	06/06/2019
Jessup, Nathan	FHH	999888777	06/05/2019	212121	10212	06/06/2019
Jessup, Nathan	FHH	999888777	06/05/2019	212121	10212	06/06/2019
Jessup, Nathan	FHH	999888777	06/05/2019	212121	10212	06/06/2019
Jessup, Nathan	FHH	999888777	06/05/2019	212121	10212	06/06/2019
Pitt, Brad	FHH	987099123		B-0987	10212	06/06/2019
QA_H_PI, Christinao	FHH	Almpjksd118472893423	05/01/2019		1214Z	05/06/2019
Smith, John	FHH	234562378	06/05/2019	56478	10212	06/06/2019
Stark, Tony	FHH	123456789012			10212	06/06/2019
Wunder, Buster	FHH	89721	06/05/2019	90761	10212	06/06/2019
Total Clients: 10			Total Auth Changes: 19			

6/12/2019 12:06:29 PM Page 1 of 2

6. **Expiring Authorizations Report:** This report allows you to review all authorizations that are ending within the specified date range.



Use this report to determine whether new authorizations need to be requested for client care.

Report Parameters
Account: 60110
For: 04/01/2019 12:00 AM - 06/12/2019 11:59 PM
Payer: All
Program: All

Expiring Authorizations

CLIENT	PROGRAM	MEDICAID ID	SOC	PRIOR AUTH END DATE	SERVICE ID	EVENT ID	REF NUM
Dyer, Mike G.	P1	123456789	2/4/2019	4/30/2019	S9124	DEF	55555
Total: 1							

6/12/2019 12:35:17 PM Page 1 of 1

7. **Visit Log Report:** All visits associated with each client within the selected date range are listed with one client per page in this report.



Use this report to track your client's visits by monitoring call times, bill information and reason codes applied.

Visit Log Report

Report Parameters
 Account # [redacted]
 Account Name [redacted]
 For: 8/8/2017 - 8/14/2017 11:59:59 PM

Account: [redacted]
 Payer: ODM
 Client Name: [redacted]
 Client Medicaid ID: [redacted]

Program	Service	SPV	Priority	Employee Name	Visit Date	Call		Actual	Adjusted		Bill		Reason Codes
						In	Out	Hours	Start	End	Hours	Hours	
None					Wed 08/09	02:23 PM	02:24 PM	0.02				0.02	10, 12, 35, 51
None					Wed 08/09	08:15 AM	09:32 AM	1.28				1.28	10, 11, 12, 35, 35, 36

8/14/2017 11:35:14 AM

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8. Visit Verification Activity Summary Report: This report contains a list of modifications for each visit. Only the modified visits are included in this report and the report is sorted by the user who performed the Visit Maintenance.



Use this report to review visit modifications. It includes what change was made, who made the change, when and why the change was made and the reason code related to the change.

Visit Verification Activity Summary

Report Parameters
 For: 9/28/2017 - 10/12/2017 11:59:59 PM

Account: [redacted]
 Payer: [redacted]
 Program: [redacted]

MEDICAID ID	CLIENT	EMPLOYEE	SERVICE	VISIT DATE	ACTUAL			ADJUSTED			BILL	REASON CODE	OMIT
					START	END	HOURS	START	END	HOURS	HOURS		
Visit Exception - Acknowledge Service Verification Exception - [redacted] - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Visit Exception - Acknowledge Visit Verification Exception - [redacted] - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Visit Exception - Acknowledge GPS Distance Exception - [redacted] - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Total Visit Updates: 3													

10/12/2017 8:15:01 AM

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9. **Visit Verification Exception Report:** This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Example: GPS Distance Exception.



Use this report to review the visit verification information and activity for a date range. It lists currently applied exceptions.




Visits with multiple exceptions appear on multiple pages.

Report Parameters
 Account: [REDACTED]
 For: 9/28/2017 - 10/12/2017 11:59:59 PM

Visit Verification Exception

Account: [REDACTED]
 Payer: [REDACTED]
 Program: [REDACTED]
 Service: [REDACTED]
 Exception Type: Client Signature Exception

SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	ACTUAL			ADJUSTED			BILLED HOURS	REASON		
					START	END	HOURS	START	END	HOURS		CODES	TASKS	EX
			123456	Mon 10/06		08:27 AM								
				Fri 10/06		11:29 AM								
				Fri 10/06		11:52 AM								
Total of Actual Hours: N/A														
Total of Adjusted Hours: N/A														
Total of Billed Hours: N/A														
Total of Visits: 3														


10/12/2017 8:20:29 AM
Page 1 of 23

10. Visit Claims Verification Status Report: This report lists all visits within selected date range regardless of the visit's status and shows the last time each visit was returned to the payer for validation.



Use this report to track what visits have been matched to the claim for a visit or the remaining balance to reconcile outstanding claims.

Visits Claims Verification Status												
												Report Parameters
Account: [REDACTED] Provider Medicaid ID: [REDACTED]												Account: [REDACTED] For: 9/28/2017 - 10/12/2017 11:59:59 PM Visit Status: In Process, Incomplete, Verified, Processed, Omit
Payer	Program	Service	HCPCS	Client Name	Medicaid ID	Visit Date	Visit		Visit Status	Batch ID	Transaction ID	Visit Verified Date
						Start	End					
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/02/2017	11:42 AM	11:44 AM	Verified			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:24 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:25 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	03:32 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:27 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:29 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:47 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	05:16 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	11:29 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:46 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/03/2017	12:00 PM	12:19 PM	Verified			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	03:30 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	04:59 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/02/2017	11:33 AM	11:35 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/02/2017	11:37 AM	11:39 AM	Verified			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:55 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	04:59 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:23 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	05:16 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	11:52 AM		Incomplete			
						Sub Total # of Visits: 20						
						Total # of Visits: 20						

12 Appendix

Glossary

A

Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Aggregator	A central data store for Sandata EVV and alternate data collection EVV systems
Alternate EVV System	Any EVV system that is not Sandata's

C

Client	A person who receives services through the Medicaid program
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D

Dashboard	Real-time status of the current day's visit exceptions
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E

Employee	A person who is employed by an agency provider to provide care to one or more clients
EVV	Electronic Visit Verification
Exception	Any visit data which Sandata EVV has denoted with a colored circle because it is either missing information or does not meet the rules established for the program

M

Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
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P

PDN	Private Duty Nursing
Privilege	A single permission

R

Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV

S

Sandata EVV Security	Sandata's Electronic Visit Verification system The module in Sandata EVV where users (office staff) are set up to use the system
Sandata Mobile Connect (SMC)	Sandata's mobile visit verification application

T

Telephonic	The system used to record calls for visits.
Telephony (TVV)	The use of a telephone to record visit data and verification when SMC is not available

U

User	A person with a unique login and password to Sandata EVV
Username	The user's email address

V

Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community-based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged