

Electronic Visit Verification (EVV)

Agency Provider Participant Guide

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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.

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



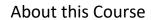
Conventions Used in this Document

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



Course Agenda

Minutes	Module			
10	Course Introduction			
15	Program Overview			
15	System Overview Log in to Sandata EVV Navigation Common Functionality			
40	Security (Office Staff) Manage Users Creating Users Alert Settings			
45	Client Module • Client Entry and Edit			
30	Employee Module • Employee Entry and Edit			
45	Scheduling Module Creating and editing schedules Recurring schedule templates			
30	SMC / TVV • Device Call-In/Call-Out • Telephony Call-In/Call-Out			
75	Visit Maintenance			
60	Group Visits SMC/TVV Visit Maintenance			
20	Reports Accessing Reports Reviewing Report Types Exporting Report Types			
30	Wrap-up Assessment & Evaluation Wrap-up Assessment			





	Training EvaluationNext Steps
90	Lunch and Breaks
505	Total Course Time



Overview/Objectives

This training is an in-depth review of the Sandata EVV environment pointing out features, structure and requirements. In this session, we will cover 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 1^{ST} , 2020 requirement for all states to use an EVV system, in accordance with the 21^{st} 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



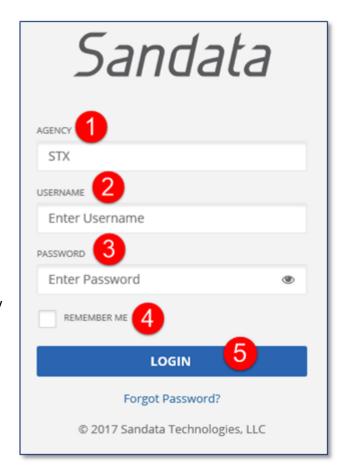
Log-in Screen

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)
- 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.





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

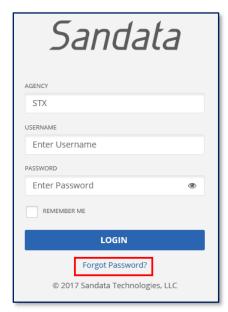


How to Reset a Forgotten Password

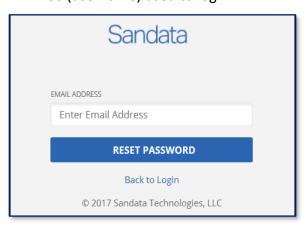
Passwords need to be reset at regular intervals, based on EVV Program requirements. A user will begin receiving prompts 10 days before their password expiration date to reset the password.

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.



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





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

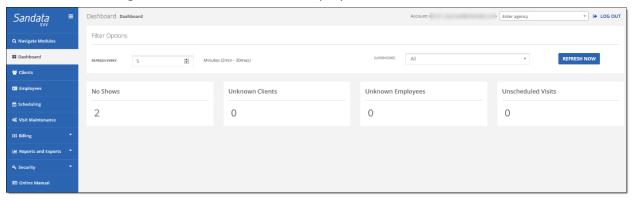


- 5. Enter the temporary password in the **OLD PASSWORD*** field.
- 6. Create and enter a new password in the **NEW PASSWORD*** field.
- 7. Re-enter the password in the **CONFIRM NEW PASSWORD*** field.
- 8. Click SAVE.



Navigating Sandata EVV

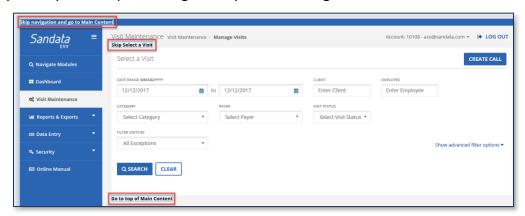
After successful login, the Dashboard screen displays.



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.



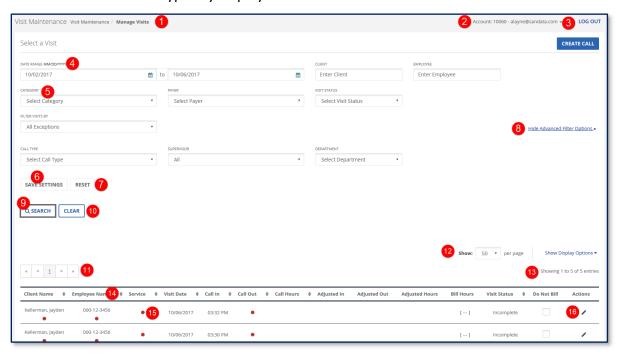


3. To accommodate users that require more time, when a user remains idle for specified period of time, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 (two) minutes, Sandata EVV automatically times out.



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.



6/11/2020



Common Functions in Sandata EVV

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

	ltem	Name	Description
1.	Visit Maintenance, Visit Maintenance / Manage Visits	Navigation Path	System and which screen is displayed.
2.	Account - @sandata.com +	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	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. 10 06/22/2017
5.	*	Show List Icon	Located in list fields, clicking this icon displays the list. TIME ZONE US/Eastern Select Time Zone US/East-Indiana US/Central US/Arizona US/Aleutian US/Alaska
6.	SAVE SETTINGS	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	Reset Button	If search settings have been saved, this button will clear them.



	Item	Name	Description
8.	Hide Advanced Filter Options	Show/Hide Advanced Filter Options	On screens enabled for searches, clicking this link shows or hides any advanced filters that are available.
9.	Q SEARCH	Search Button	Executes a search.
10.	CLEAR	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.	Show: 10 ▼ per page	Number of Items per Page Setting	This setting allows users to select how many rows of a list are displayed on each page.
13.	Showing 1 to 10 of 89 entries	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.	1	Edit Button	Opens an individual record with its fields in an editable state.

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Additional Buttons and Icons

The following buttons are frequently displayed throughout the Sandata system:

Button	Function	Description	
ADD	Add Button	Clicking this button adds another row to a listin	
CANCEL	Cancel Button	Cancels an operation and closes the screen.	
rook	Check Box	Filling a check box enables a feature, clearing it disables it.	
		In fields that require a time to be entered, clicking this icon allows the user to select a time.	
0	Clock Icon	FROM TIME HHAMM AMPM 12:00 AM 1 : 00 PM V V V	
CREATE	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	Finish Button	Completes and terminates a task.	
â	Lock Icon	Displays the password to help with log-in and password entry.	
(Play Icon	Starts a playback of the client Voice Verification recording.	
Employee ID Employee Name Select 000051576 Rose	Radio Button	Radio buttons allow the user to select one or more items from a list.	
0	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 NOW	Refresh Button	Refreshes one or several fields on a screen, usually search fields.	

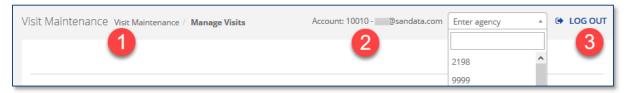


Button	Function	Description
SAVE	Save Button	Located in <i>Data Entry</i> fields, this button saves the information that has been entered.
•	Show Information Icon	Clicking this icon displays additional information about a system field. For example, at the login screen clicking this icon displays a password being typed in. NEW PASSWORD 1970MonteCarlo@
	Stop recording Button	Pressing this button stops the client voice recording during the SMC call-out process.
TERMINATE	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.

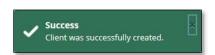


	Function	Description	
1.	Navigation Path	This field shows a user the exact location in the system and the current screen.	
2.	Account and User Display	Displays the account the user is logged into and the username/email of the user currently logged in. Moving Between Multiple Accounts Click the small 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.	
		A user must have permissions to log into more than one account and the username must be the same across all accounts The account the user is currently logged into is indicated by a check box.	
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

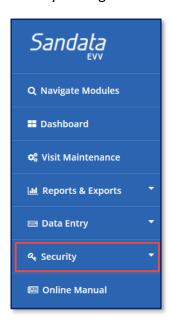
Sandata EVV Security Settings

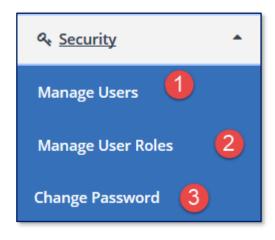
The Security settings in Sandata EVV allow Administrators to:

- 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 Sandata EVV are divided into three sections:

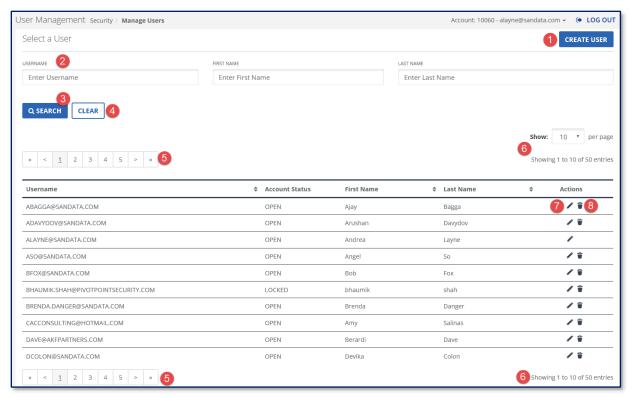
- 1. **Manage Users** This section allows the user to create and maintain users.
- 2. **Manage User Roles** Roles allow the system administrator to group privileges and assign them to users of the EVV system.
- 3. **Change Password** This section allows the logged in user to change his/her password.

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.

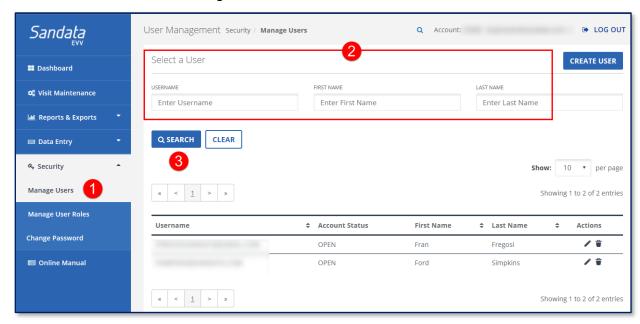


- 1. **CREATE USER** Used to create a new user profile.
- 2. Filters Allows for a search by either **USERNAME**, **FIRST NAME** or **LAST NAME** or a combination of the three.
- 3. **SEARCH** Retrieves the related information based upon the filters used.
- 4. **CLEAR** Deletes the information from the 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

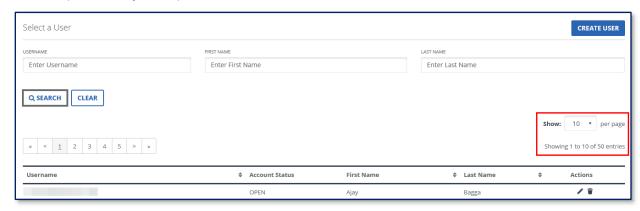
Search for users from the Manage Users screen.



- 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.

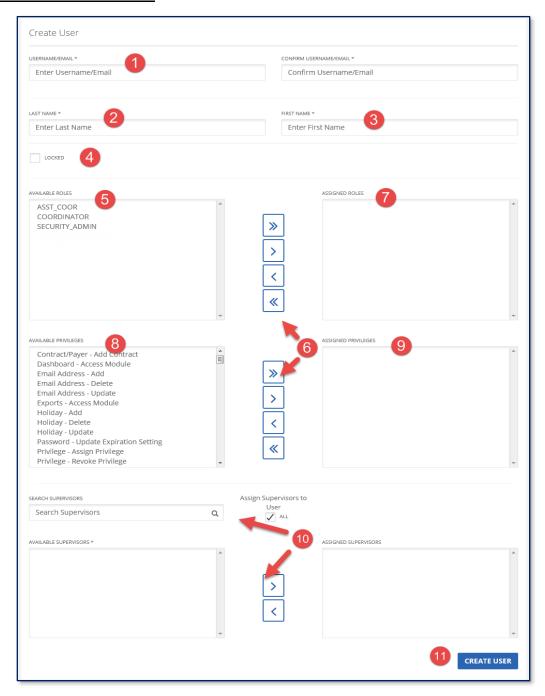


Perform additional searches by clicking **CLEAR** and entering new search criteria.



Creating a New User

Create User Screen Overview





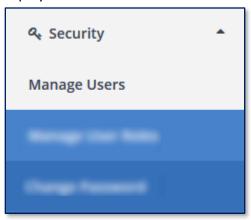
- 1. **USERNAME/EMAIL** This field is to enter a user's email address, which is also their username.
- LAST NAME User's last name.
- 3. FIRST NAME User's first name.
- 4. **LOCKED** If selected, prevents the user from logging into the system. It is unchecked by default.
- 5. **AVAILABLE ROLES** The roles 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.

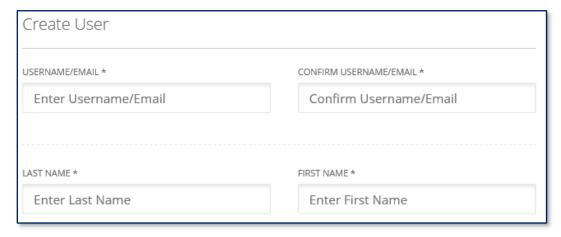
1. Click **Security>Manage Users** from the *Navigation* panel. The *Manage Users* screen displays.



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



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



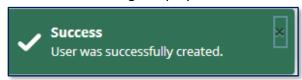


- 4. The **LOCKED** checkbox prevents the user from logging into the system. Leave this field unchecked to allow the user to log in.
- 5. Click the appropriate item in the **AVAILABLE ROLES** field and click the > button to move it into the **ASSIGNED ROLES** field. All user privileges assigned to the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



- 6. Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.
- 7. 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 Security Module on the navigation panel and then click the Manage Users.	
2.	Click the CREATE USER button in the upper-right corner of the screen.	
3.	Enter a username (Use the email extension of "@mailinator.com". For example: jsmith@mailinator.com). 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.	



	Open another web browser window and type in the URL: www.mailinator.com 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 Sandata.evv Temporary Password email displayed.
	c. Copy the temporary password and click the Login button.
9.	d. Enter your assigned training agency number
Э.	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
	You are now logged in to Sandata EVV under the user new account.

Creating A Second User As A Coordinator	
Task	Description
1.	Click the Security Module on the navigation panel and then click the Manage Users.
2.	Click the create 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: jsmith@mailinator.com). 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 CREATE USER 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.



Open another web browser window and type in the URL: www.mailinator.com

- 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 *jsmith*) for the new user and click **GO**.
- k. Click on the Sandata.evv Temporary Password email displayed.
- I. Copy the temporary password and click the Login button.
- m. Enter your assigned training agency number
- n. Enter the email address for your new user
- o. Enter the temporary password you just copied and click LOGIN
- p. Enter the temporary password in the **OLD PASSWORD*** field (click the "eye" icon to display the password information)
- g. Enter a new password and re-enter the password to confirm
- r. Click SAVE

You are now logged in to Sandata EVV under the user new account.

8.



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.



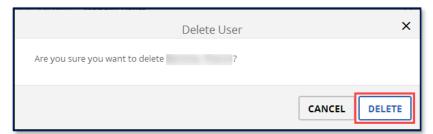


Deleting a User



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.



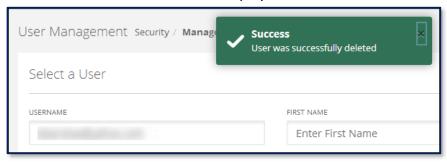


Page 3-14

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

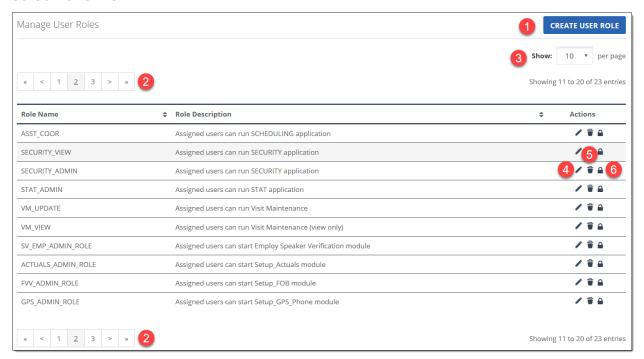
The use of roles allows Administrators to tailor a set of system functions for each job title in the organization to make maintenance of user access easier. Whenever a role is edited, it affects **all** users who have been assigned to that role.

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

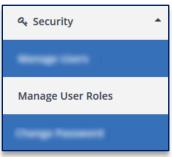


- 1. Create User Role Used to create a new user role.
- 2. **Page Navigation** Dependent upon the number of results, there can be 1 or multiple pages.
- 3. **Show** Allows for input of how many entries are shown per page and displays the total number of results returned.
- 4. Edit Edit a user.
- 5. **Delete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



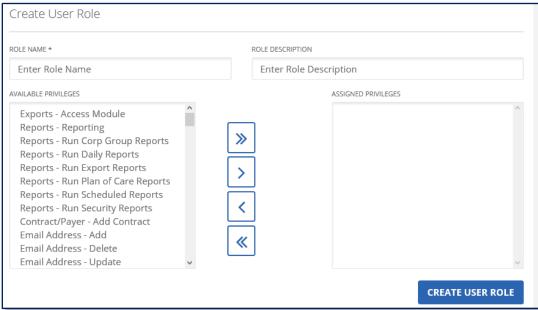
Creating New User Role

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.

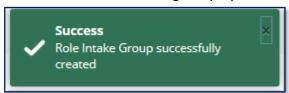


4. Enter a brief description in the **ROLE DESCRIPTION** field.

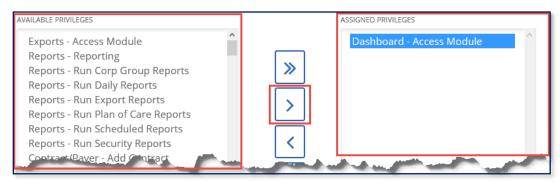


5. Click CREATE USER ROLE. A successful confirmation message displays.





- 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.



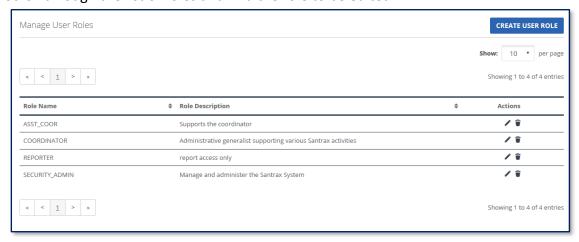
9. Click **MODIFY USER ROLE** to save the assigned privileges.



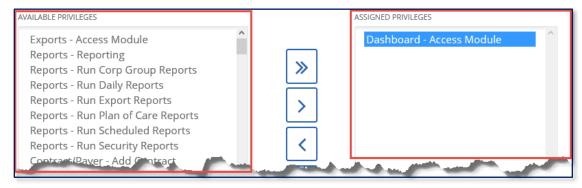
Modifying Roles

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.

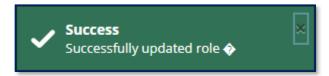


- 2. Click **Edit** in the **Actions** column on the right-hand side of the screen of the role to be modified. The *Modify User Role* screen opens.
- 3. Add (AVAILABLE PRIVILEGES) or remove (ASSIGNED PRIVILEGES), as necessary.



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





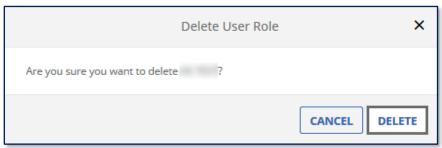


Deleting Roles

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



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.



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





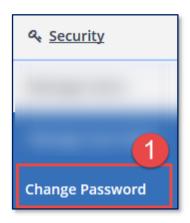
Change Password

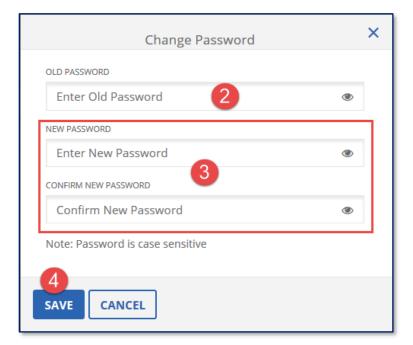
Resetting Your Own Password

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.





- 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.



Alert Settings

Alert Settings are intended to alert client agency personnel when services for scheduled visits are late or missed. Depending on configuration, up to 3 alerts can be sent at different times after the scheduled start. The number of minutes after the schedule starts for each of the alerts to be sent is set during implementation. If a call has not been received from a client's home within the configured period of time after the start of the schedule, Sandata EVV will send an email or text message to those who are setup within the agency. A 2nd and 3rd alert can be sent to the same or different users as needed.

Setup Holidays

An agency can define a list of holidays. Sandata EVV will regard-these holidays as non-business hour times and send alerts to non-business hour contact(s).

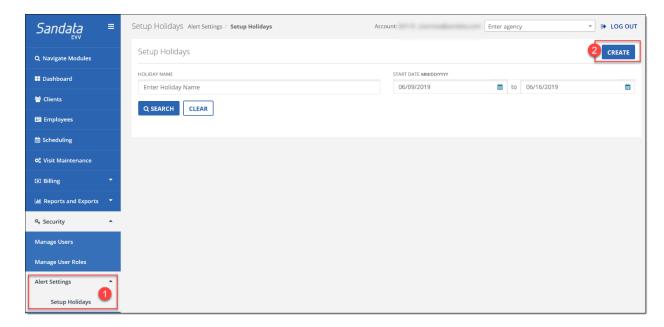


Search for Holidays

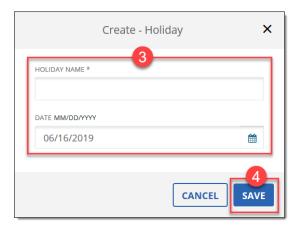
- 1. Click Alert Settings > Setup Holidays
- 2. Select the START DATE and END DATE.
- 3. Click **SEARCH**. Any matching results will display on the screen.

Create Holidays

- 1. Click Alert Settings > Setup Holidays.
- 2. Click CREATE.



- 3. Enter the Holiday name and select the date
- 4. Click SAVE.





5. A success confirmation displays stating the holiday is created.





Holiday's are consdered Non Business Hours for the Alerts function.





Exercise: Creating a Holiday

Task	Description	
10.	Click the Security Module, click Alert Settings, and then click Setup Holidays.	
11.	Click CREATE .	
12.	Enter the Holiday Name.	
13.	Select the date of the Holiday.	
14.	Click SAVE .	



Setup Work Schedules

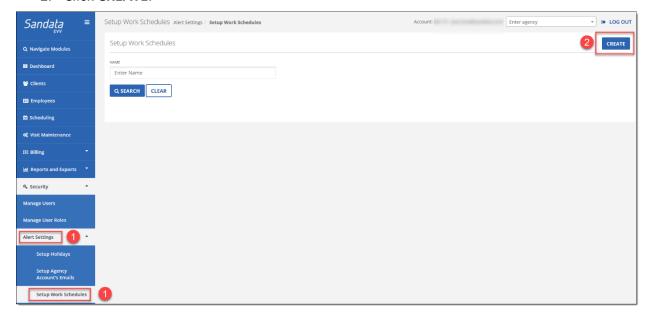
An agency can use this to set up work schedules that will be used to determine when to send alerts to office staff when Sandata EVV has not received a call-in or start of visit within the allowed timeframe of a scheduled visit by the assigned employee.

Search for Existing Work Schedules

- 1. Click Alert Settings > Setup Work Schedules
- 2. Enter the NAME of the work schedule.
- 3. Click **SEARCH**. Any matching results will display on the screen.

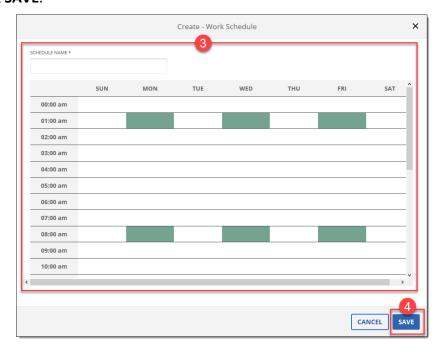
Create Work Schedules

- 1. Click Alert Settings > Setup Work Schedules
- 2. Click CREATE.





- 3. Enter the Schedule Name and select the days and times.
- 4. Click SAVE.





Highlighted times of a work schedule are considered Business Hours. All other times are considered Non-Business hours.





Exercise: Create a Work Schedule

Alert Settings – Create a Work Schedule	
Task	Description
1.	Click the Security Module, click Alert Settings, and then click Setup Work Schedules.
2.	Click CREATE .
3.	Enter the Schedule Name.
4.	Select the date and times of the schedule.
5.	Click SAVE .

Agency Provider Participant Guide



Setup Agency Account Emails

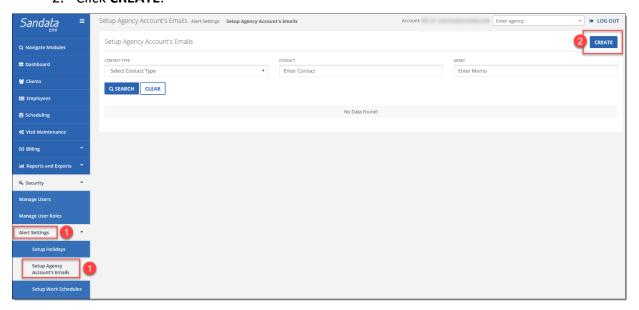
An agency must first select the contact type so that Sandata EVV knows in which format to deliver the alerts. Each user can have multiple email addresses that are active at the same or different times. The system allows you to temporarily enable or disable specific email addresses so that you can stop sending alerts to specific addresses without removing them from the system. Using this method will send alerts for all scheduled visits that have a missing start call.

Search for Existing Contacts

- 1. Click Alert Settings > Setup Account Agency Emails
- 2. Enter values in either the **CONTACT TYPE**, **CONTACT**, and MEMO field.
- 3. Click **SEARCH**. Any matching results will display on the screen.

Create a New Contact

- 1. Click Alert Settings > Setup Agency Account's Emails
- 2. Click CREATE.



- 3. Select the **CONTACT TYPE**. You can select office email, home email, mobile email, or phone number to receive an outbound call.
- 4. Enter the **CONTACT**. What is entered in this field will vary based on the contact type selected. You can also enter a text alert format to receive the alert via text message.



Text alert formats include:

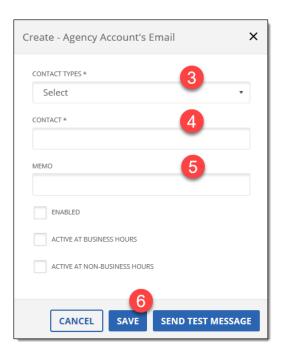


Verizon: xxxxxxxxxxx@vtext.com AT&T: xxxxxxxxxxx@txt.att.net

Sprint: xxxxxxxxxx@messaging.sprintpcs.com

T-Mobile: xxxxxxxxxxx@tmomail.net

- 5. Enter the MEMO (Optional), and select the **ENABLED** checkbox. Check if the contact receives Alerts during Business Hours (defined work schedule) or Non-Business Hours (all other times, including Holiday)
- 6. Click SAVE.





Setting up Agency Contact Emails here will send all level alerts for all clients.



Clicking the **SEND TEST MESSAGE** button will send a test message to the contact that you entered.



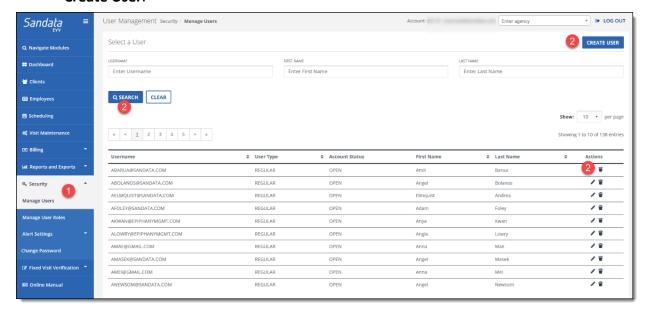
Setup a User/Supervisor to Receive Alerts

Using this method will allow a user or supervisor to receive up to three levels of alerts.

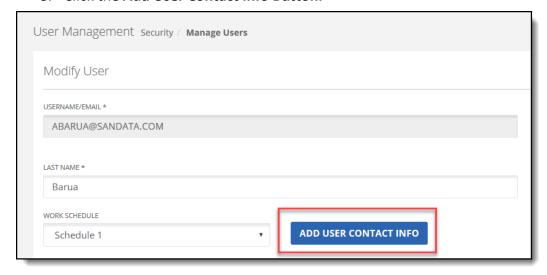
Examples of these levels include: Level 1 (5 minutes after start of visit), Level 2 (15 minutes after the Level 1 alert), Level 3 (30 minutes after Level 2 alert). The times of when these alerts will be sent are configurable per agency or state program during implementation.

Setup Emails for a User or Supervisor to Receive All Level Alerts

- 1. Click Security > Manage Users.
- 2. For existing users, search for the user and click the Edit icon. If creating a new user, click **Create User**.



3. Click the Add User Contact Info Button.





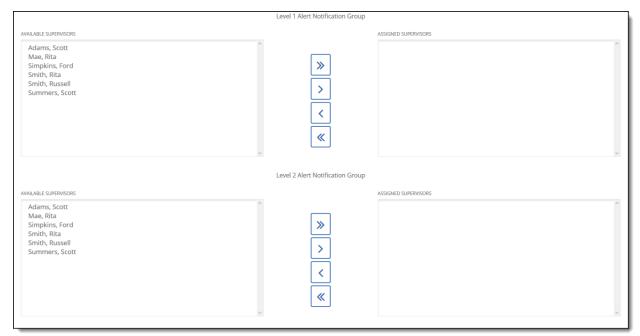
4. Follow the process of Creating a Contact in Alert Settings.



Security Roles and Privileges are not required to set up for a supervisor to receive alerts.

Assigning a Supervisor to a User to Receive Different Level Alerts

Within the *Modify User* or *Create User* screen, assign the Available Supervisors to the appropriate alert level notification group. This allows different users to receive different alert level notifications.





Supervisors must be assigned to clients to appear in the Available Supervisors box.

When creating a Supervisor, after the Security Admin creates the supervisor as a User, have the user log in to EVV and click on the Client module. This automatically creates the User an Employee.



Go into the User's Employee record and check the Supervisor box. The user is now designated as a supervisor and appears in the Supervisor field of the client record for selection.

A supervisor must be assigned to a client record in order to receive alerts for the clinet.





Exercise: Create a New Contact for Agency Account Emails

Task	Description
1.	Click the Security Module, click Alert Settings, and then click Setup Agency Account Emails.
2.	Click CREATE .
3.	Select the Contact Type. You can select office email, home email, mobile email, or phone number to receive an outbound call.
4.	Enter the Contact. What is entered in this field will vary based on the contact type selected.
5.	Select the Select the Level checkbox
6.	Click SAVE .



Exercise: Setup Emails for a User to Receive all Alerts

Task	Description
1.	Click the Security Module and then click Manage Users.
2.	Search for your created user and click the 🗾 icon.
3.	Click ADD USER CONTACT INFO
4.	Click CREATE .
5.	Select the Contact Type. You can select office email, home email, mobile email, or phone number to receive an outbound call.
6.	Enter the Contact. What is entered in this field will vary based on the contact type selected.





7.	Select the <a> ENABLED checkbox
8.	Select Active at Business Hours
9.	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

6/11/2020



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.

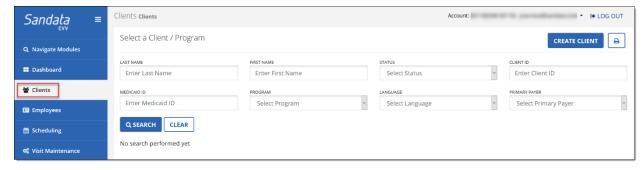
Accessing Clients

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.



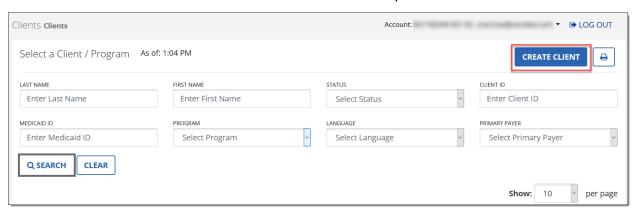
Create New Client(s)

To create a new client, the first name, last name, program and Medicaid ID. Language preference and any known addresses, at which the individual can routinely receive services, are required fields. Enter the information into the Create New Client screen. The required fields are indicated with an asterisk (*), to the right of the field. All other fields on the screen are optional and not necessary in order to save the new client record.



Demonstration: How to Create a Client

1. Click CREATE NEW CLIENT. The Create Client screen opens.

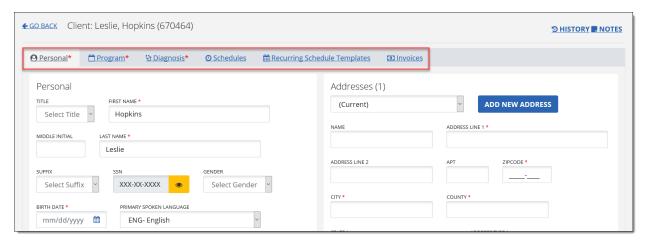


2. Enter the required fields: FIRST NAME, LAST NAME, PROGRAM, MEDICAID ID and click **CREATE CLIENT.**





3. The new client record is created and the *Personal* screen is displayed for additional data entry. Navigate through the tabs to enter necessary information.





Personal



- **TITLE:** Select from the drop-down.
- **FIRST NAME*:** Populated when creating the client (required).
- MIDDLE INITIAL: Enter if necessary.
- LAST NAME*: Populated when creating the client (required).
- SUFFIX: Select from the drop-down list.
- **SSN:** Click the "eye" icon to display the field for entry.
- **GENDER:** Select from the drop-down.
- **BIRTH DATE*:** Type into the field (including slashes) or click on calendar icon to select (required).
- **PRIMARY SPOKEN LANGUAGE:** Select from the drop-down list.

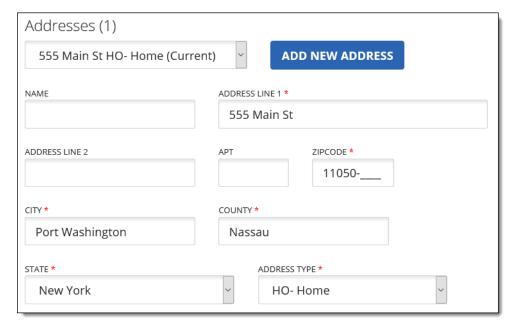




During the telephony call process, you will be prompted to enter a client ID to identify the client. This number can be found within the client record next to the client's name in parenthesis.



Address

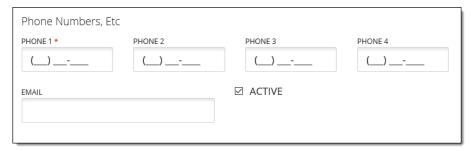


- **NAME:** Provide an identifier for your address (example: Daughter's house, Sister's, etc.) (required).
- ADDRESS LINE 1*: Type the street address (required).
- ADDRESS LINE 2: Enter if additional space is needed.
- APT: Type an apartment number if needed.
- ZIP CODE*: Type in the address zip code (this automatically fills in the CITY, COUNTY and STATE fields).
- ADDRESS TYPE*: Select from the drop-down.

6/11/2020



Phone Numbers, etc.



- **HOME:** Type the telephone number.
- **MOBILE:** Type the telephone number.
- WORK: Type the telephone number.
- **FAX:** Type the telephone number.
- EMAIL: Type the email address.
- Active: Uncheck if the address is no longer valid.

Agency



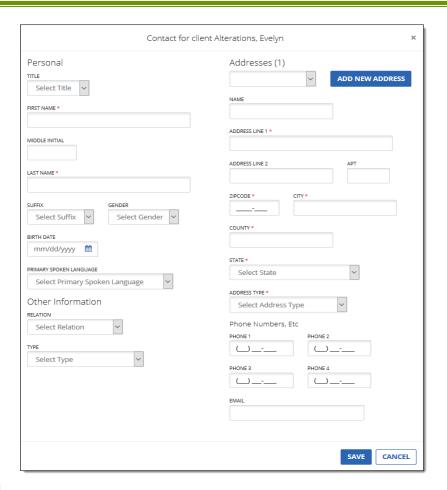
• OTHER ID: Unique system assigned ID number.

Contacts



- 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







Client Status



- **STATUS:** New clients are *Pending* by default. Set status to *Active*.
- **EFFECTIVE DATE:** Defaults to date the client record is created.
- **REASON FOR CHANGE:** N/A.



Program Details



- PROGRAM*: Populated when creating the client (required). Select from drop-down list to change.
- SUPERVISOR: Select from the drop-down. Used to group clients to supervising office staff.
- **CREATED DATE*:** Defaults to date the client record is added in the system (required). Click into the field to change if necessary.
- **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 (+) sign to add a Service.



- **SERVICE*:** Select a Service from the drop-down
- **BEGIN DATE*:** Type into the field (including slashes) or click on calendar icon to select (required)
- END DATE: Type into the field (including slashes) or click on calendar icon to select

Click **SAVE** to save the Service information. Repeat the steps above to add additional services.

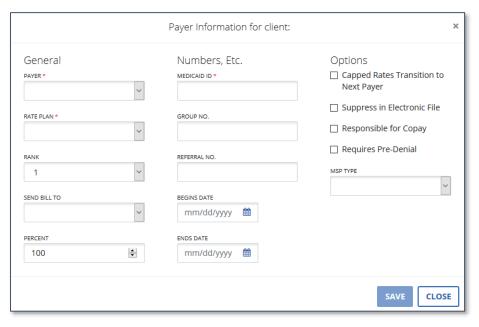


Payers

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.



Click the (+) sign to add a Payer. Enter the necessary information.



- PAYER*: Select a Payer name from the drop-down list
- RATE PLAN*: Select a Rate Plan that is assocated to the Payer selected
- **RANK:** The 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:** Select the 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*: Enter the unique ID number assigned to the client by Medicaid
- **GROUP NO.:** This is an identification number used for invoicing.
- **REFERRAL NO.:** This is an identification number used for invoicing.
- **BEGIN DATE:** Select the begin date of payer coverage.
- **END DATE:** Select the end date of payer coverage.
- Capped Rates Transition to Next Payer: To bill hours that extend past the rate's Cap amount to Rank 2 payer, select this checkbox.
- Suppress in Electronic File:
- Responsible for Copay:
- Requires Pre-Denial:



• MSP TYPE: Select the MSP (Medicare Secondary Payer) Code as needed from the drop down menu, such as "Veterans Administration".

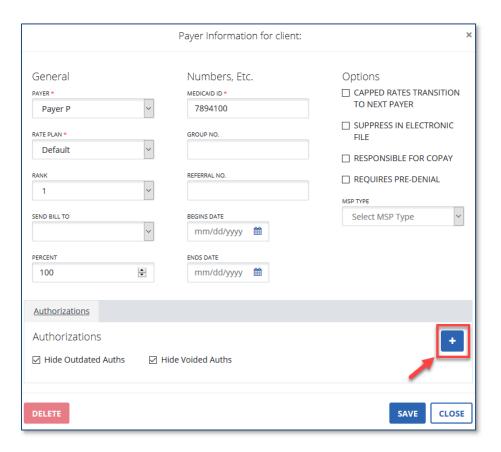
Click SAVE to save the Payer information. Repeat the steps above to add additional services

Authorizations

1. Click on the Medicaid ID link to open the Payer Information screen.



2. Click the (+) sign within the Authorizations panel to add an authorization.

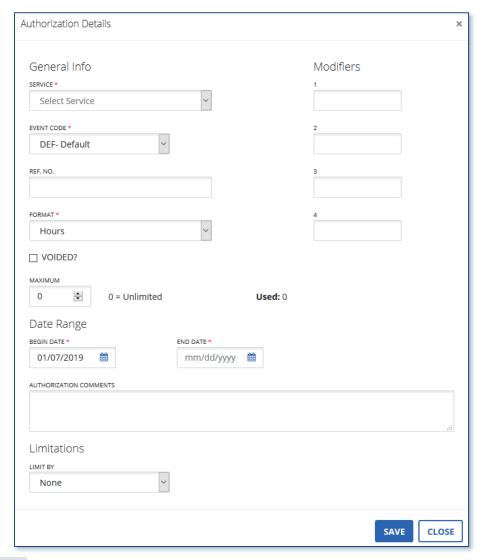


- 3. Complete the necessary fields.
 - **SERVICE***: Select the service the authorization is associated with from the drop-down list.
 - **EVENT CODE***: The value defaults to DEF Default.
 - **FORMAT***: Select the appropriate format from the drop-down list.
 - **VOIDED?:** Select this checkbox if the authorization has been voided.



- MAXIMUM: Enter the allowed amount.
- **BEGIN DATE***: Enter the first date of the authorization.
- **END DATE***: Enter the last date of the authorization.
- **AUTHORIZATION COMMENTS**: Enter any applicable comments for the authorization here.
- **LIMIT BY**: Select from the drop-down if the authorization has limitations of service.
 - 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.

4. Click SAVE when done.

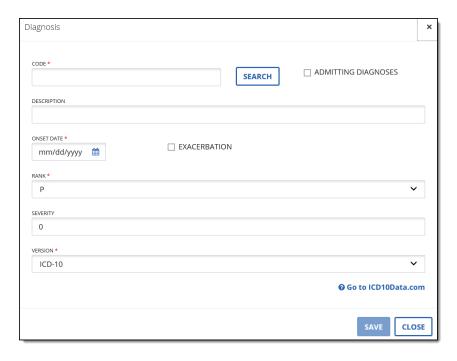






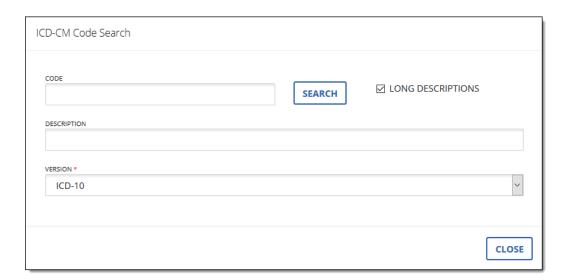


Click the (+) sign to add a Diagnosis.

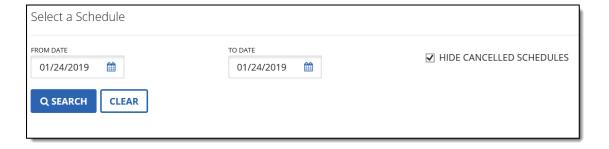


- 1. Enter the necessary information
 - **CODE**: Enter or search for the diagnosis code
 - **DESCRIPTION**: Shows the description of the diagnosis
 - **ONSET DATE**: Enter the date when the condition was diagnosed. If the diagnosis is an exacerbation of the condition, click the Exacerbation check box.
 - 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.





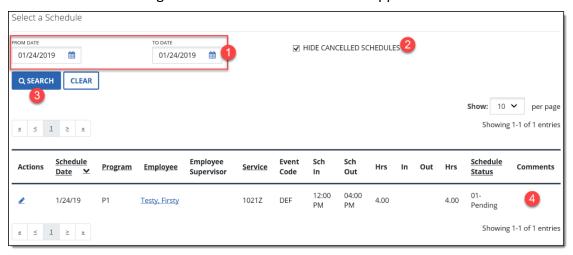
O Schedules





Viewing Client Schedules

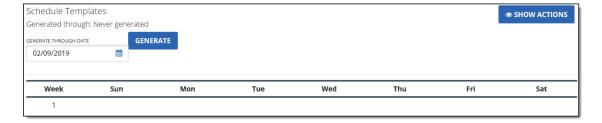
- 1. To view a client's schedule, specify the dates of service (From Date, To Date).
- 2. Uncheck the Hide Cancelled Schedules check box, if applicable. This will include cancelled schedules in your results.
- 3. Click SEARCH.
- 4. The schedules matching the search criteria entered will appear in the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



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.







Exercise: Create a New Client

Task	Description	
1.	Click the Client Module on the navigation panel.	
2.	Click the CREATE CLIENT button in the upper-right corner of the screen.	
3.	Enter a First Name, Last Name, Program, and Medicaid ID into the appropriate FIRST NAME*, LAST NAME*, PROGRAM*, and MEDICAID ID* fields. Click CREATE CLIENT	
4.	Enter the birth date of the client in the BIRTH DATE* field.	
5.	Enter an Address.	
6.	Add a Phone Number.	
7.	Click the <i>Program</i> tab and change the STATUS* field to 02- Active	
8.	Add an Authorization by clicking the Payer hyperlink.	
9.	Click SAVE to save the Authorization. Click SAVE & CLOSE .	
10.	At the Select a Client screen, use the filters to search for the client you just created.	

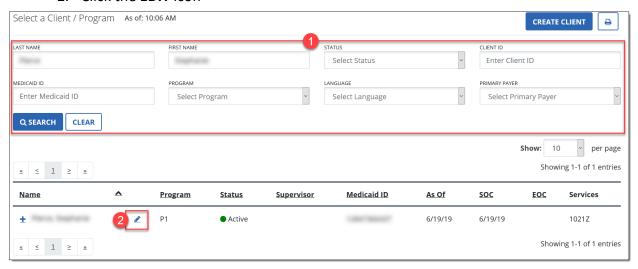


Modifying Client Data

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



3. Make all necessary updates to the client data



4. SAVE & CLOSE

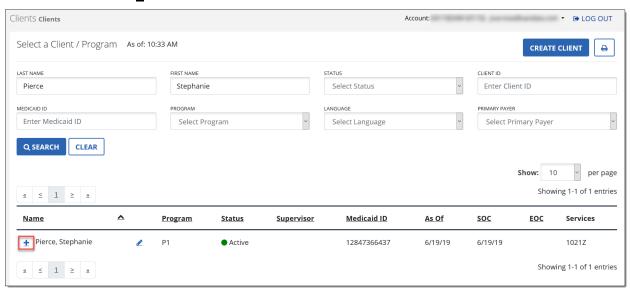




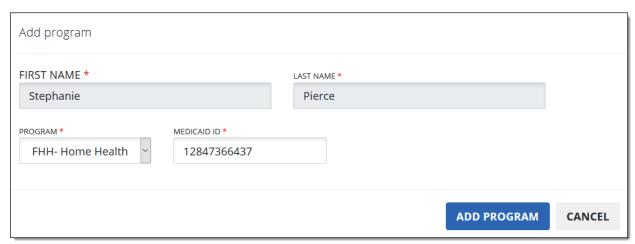
Adding a New Program to a client

A client can be associated with more than one program. Search for the client and then click the + icon to add a program.

- 1. Search for the Client
- 2. Click the + icon



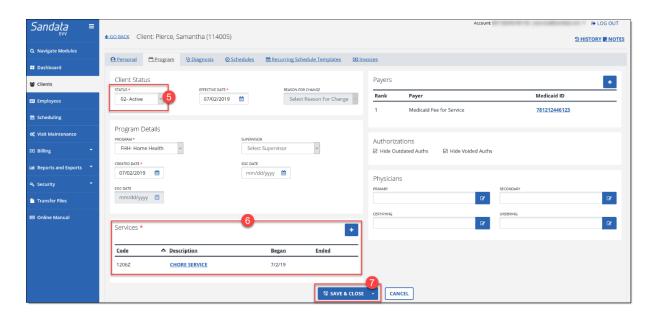
- The Add Program screen displays. Enter the required information: PROGRAM* and MEDICAID ID*
- 4. Click ADD PROGRAM



- 5. In the client record, click the Program tab and change the status of the client to 02-Active.
- 6. Add the service(s)



7. SAVE & CLOSE.





Discharging Clients

Use the Discharge status when provider services are no longer required. Discharging 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.



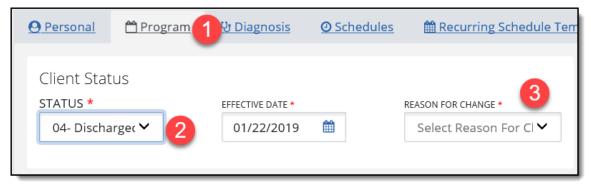
Demonstration: How to Discharge a Client

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



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.



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



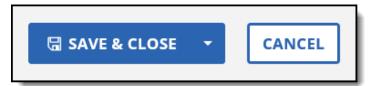




Note that when clicking into the EOC DATE field, a pop up will display confirming that you want to change the EOC date.



5. SAVE & CLOSE.





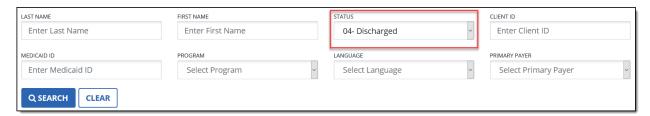
Reactivating Clients

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

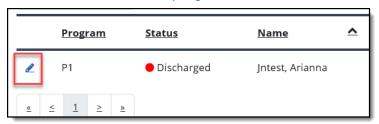


Demonstration: How to Reactivate a Client

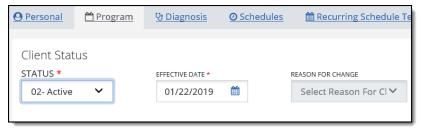
1. Search for the status of 04- Discharged



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



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



4. SAVE & CLOSE







Exercise: Discharge/Reactivate a Client

Discharging 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 Q SEARCH .	
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- Discharged.	
5.	From the Reason for Change menu, select a Reason for Change.	
6.	Enter the EOC (End of Care)* Date .	
7.	Click SAVE & CLOSE .	

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



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



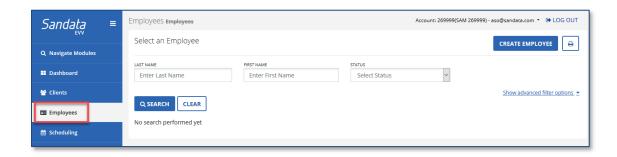
Employee Data

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.

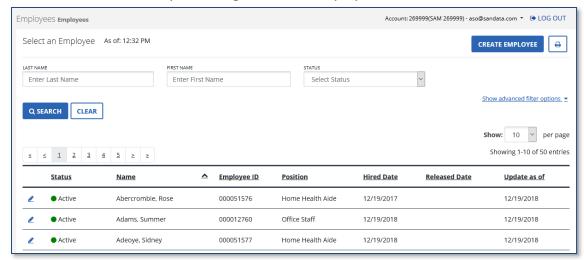
Search for an Employee



De

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.
- Click SEARCH. Any matching results are displayed at the bottom of the screen.





Create New Employee(s)

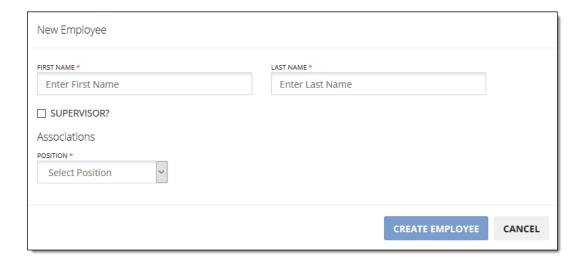
To create a new employee, at a minimum, the last name, first name and position are required to start. Required fields are indicated with an asterisk (*), to the right of the field.



Demonstration: How to Create a New Employee

The employee record is made up of the following sections.

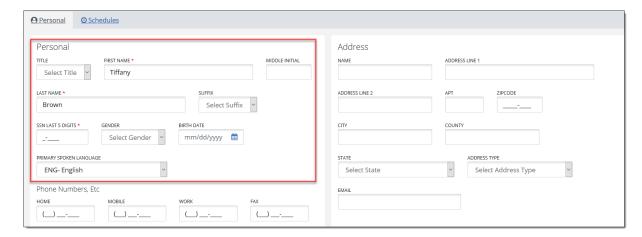
- 1. Click Employees>CREATE EMPLOYEE
- 2. Enter the employee **FIRST NAME**, **LAST NAME**, and **POSITION**.
- 3. Click **CREATE EMPLOYEE**.



4. Personal

• Enter the last 5 digits of the employee Social Security Number.



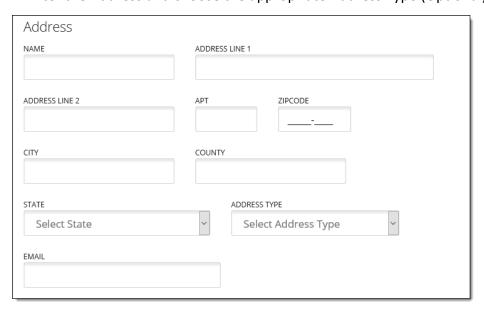


5. Phone Numbers, etc. (Optional)



6. Address

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

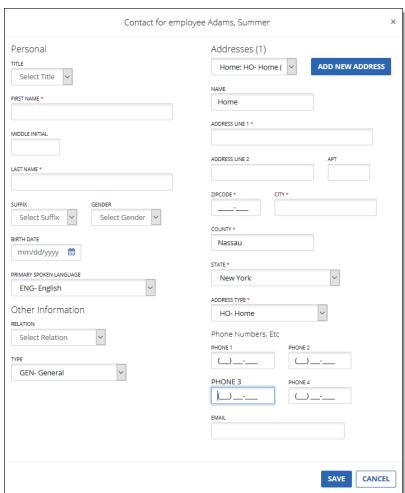




- 7. Contacts (Optional)
 - a. Click the (+) sign the Contacts section



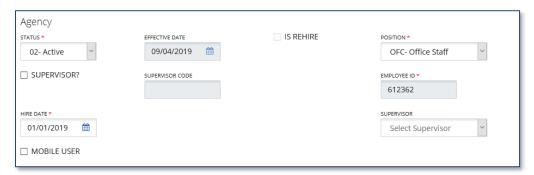
- b. Fill in the necessary information for the employee contact. Required fields include: FIRST NAME, LAST NAME, ADDRESS LINE 1, ADDRESS TYPE and ZIP CODE (entering a valid zip code automatically populates the City, County and State).
- c. Click the ADD NEW ADDRESS button to add additional address for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





8. Agency

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



SUPERVISOR checkbox: Identifying an employee as a supervisor allows the employee to be assigned as the supervisor in the client record, for reporting and filtering data. Checking the box opens the **SUPERVISOR CODE** field, requiring a 3-digit numeric value to entered. Any 3-digit numeric value will be accepted.





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 SUPERVISOR checkbox must be checked in order for the system to identify the employee as a supervisor to receive alerts and to be assigned to clients.



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.

9. SAVE & CLOSE / Cancel







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.

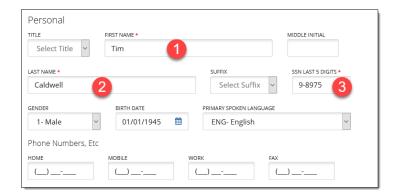




Follow Me: How to Create a New Employee

- 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)





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



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



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





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 CREATE EMPLOYEE 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 MOBILE USER checkbox in the Agency section of the screen Note: 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 SAVE & CLOSE .		
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

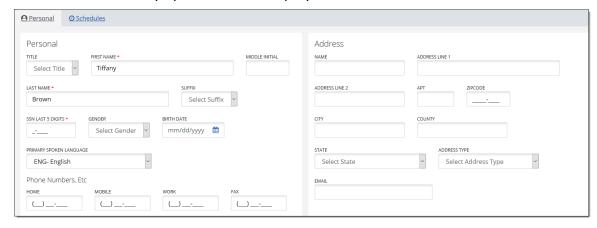
Modifying an employee's data will allow you to update all their information, as necessary.

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



3. Make all necessary updates to the employee data



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.

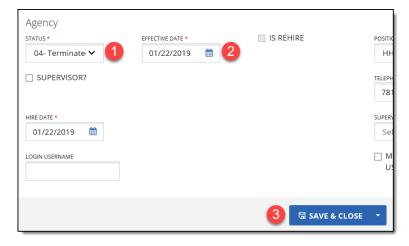


Demonstration: How to Terminate an Employee

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 Q SEARCH .
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 SAVE & CLOSE .



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





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





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 Q SEARCH
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 SAVE & CLOSE .



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.

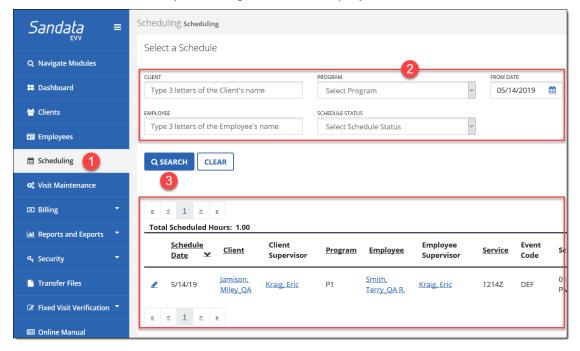


Note that a search can be conducted with no criteria entered by clicking SEARCH or pressing ENTER on the keyboard. This will result in a complete list of schedules.



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.





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.

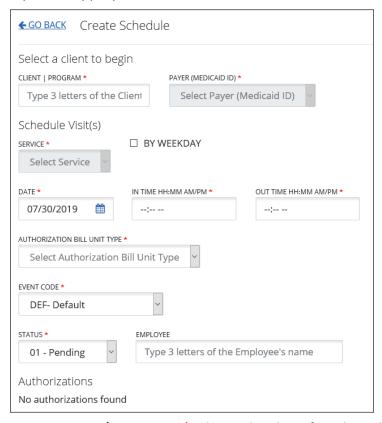


Demonstration: Create a New Schedule

1. Click Scheduling > CREATE SCHEDULE



2. Input the appropriate criteria for the schedule



- **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.

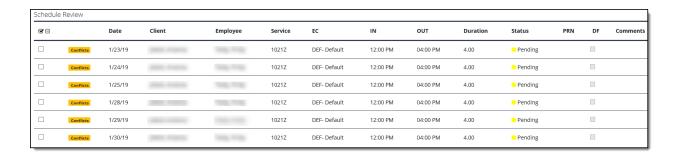


- BY WEEKDAY: Select whether the service will be scheduled by weekday.
- DATE*: Shows the date of the schedule. Always defaults to today's date.
- IN TIME*: Indicates the time when the visit will be scheduled to occur.
- OUT TIME*: Indicates the time when the visit will be scheduled to end.
- AUTHORIZATION BILL UNIT TYPE*: This defines how the service time (quantity) is calculated and billed
 - o **Hourly:** A service is billed for the length of the service (8 hrs. x rate).
 - o 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.
 - o **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 schedulesd 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
- 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.





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.







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.



5. Click **SAVE SCHEDULES**.





Exercise: Create a New Schedule

Task	Description
1.	Click the Scheduling Module 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 Click Review the preview for any possible mistakes or conflicts.
6.	Click SAVE .
7.	At the Schedule Preview Validation screen, click
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.



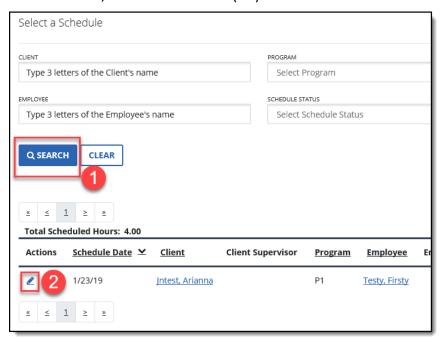
Reschedule a Visit

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

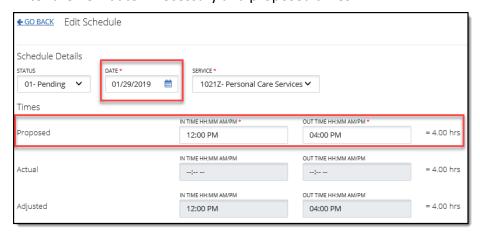


Follow Me: How to reschedule a visit

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



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





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 Q SEARCH .
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 SAVE .
6.	At the Schedule Preview Validation screen, click SAVE SCHEDULE
7.	A screen displays stating the listed schedules have been saved. Click ok.



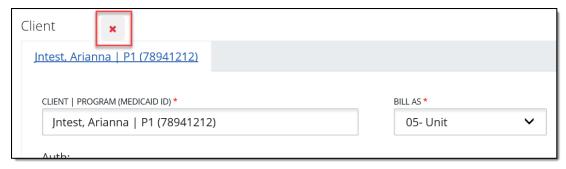
Removing and Replacing a Client on Schedules

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



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

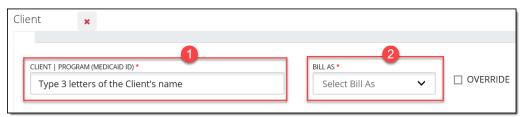
1. In the Client section, click the **X** icon to remove the existing client.



2. Click the + icon to add a new 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.



5. Click SAVE.







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 Q SEARCH .
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 SAVE .
9.	At the Schedule Preview Validation screen, click
10.	A screen displays stating the listed schedules have been saved. Click ok.



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.



2. Click the + icon to add a new employee



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







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 Q SEARCH .
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 SAVE .
8.	At the Schedule Preview Validation screen, click SAVE SCHEDULE.
9.	A screen displays stating the listed schedules have been saved. Click ok.



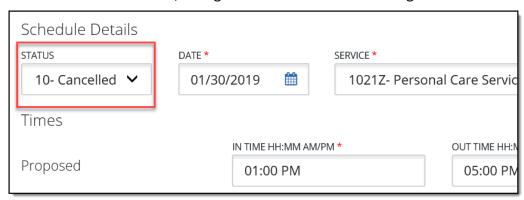
Cancelling a Scheduled Visit

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



2. Click SAVE.

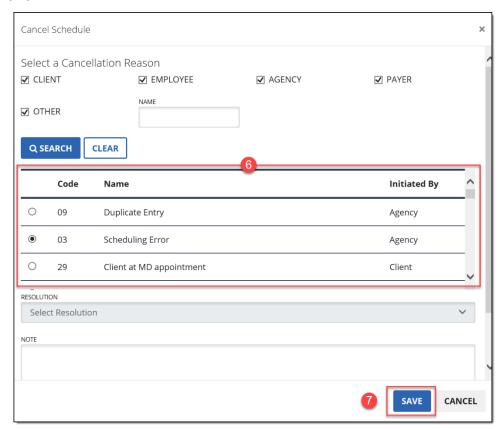


- 3. The Schedule Preview Validation dialog box appears.
- 4. Click **SAVE SCHEDULE**.





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



8. Click OK.







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 Q SEARCH .
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 SAVE .
6.	At the Schedule Preview Validation screen, click
7.	The Cancel Schedule dialog box appears.
8.	Select a cancellation reason
9.	Click SAVE .
10.	A screen displays stating the changes have been saved successfully. Click OK.



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

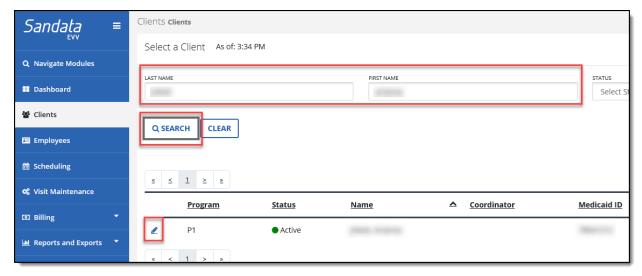


Best practice is to create a recurring schedule pattern that last for two weeks and that a pattern last no longer than four weeks. A recurring schedule pattern can be pushed forward for as long as needed.



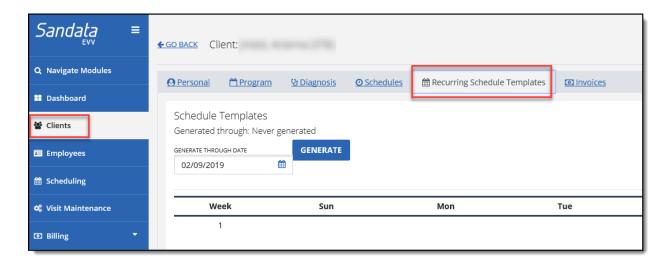
Demonstration: How to create a recurring schedule template

1. Search for the client and click EDIT.



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





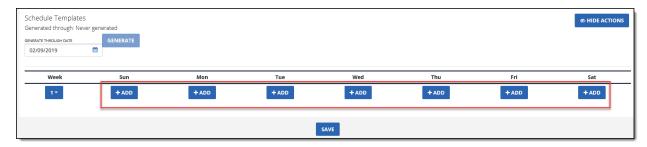
3. Click **SHOW ACTIONS** to display executable actions on the days of the week.



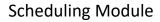


Note that the Show Actions button will become Hide Actions when clicked.

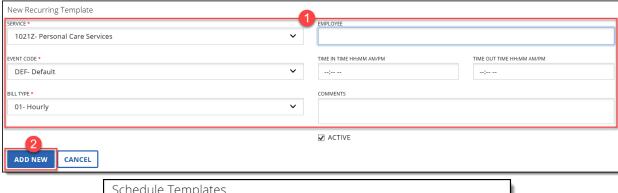
4. Click the **ADD** button on the day that the recurring schedule will start.



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









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 ADD NEW.
6.	Click SAVE .
7.	A screen displays stating the changes have been saved successfully. Click



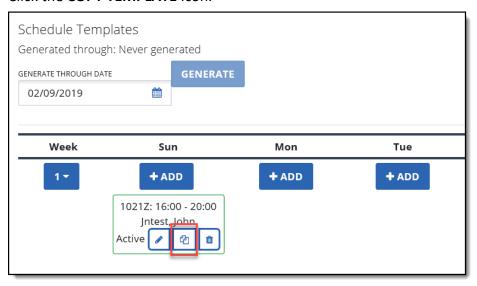
Copying Recurring Schedule Templates

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.



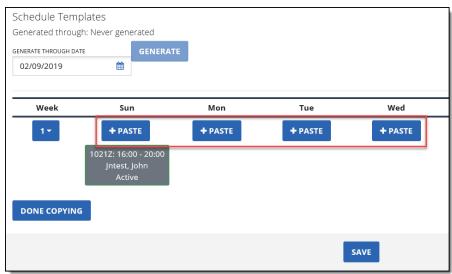
Follow Me: How to copy a recurring schedule template

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





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



- 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 SHOW ACTIONS to display executable actions on the days of the week.
4.	Click the icon to copy the template.
5.	Click the + PASTE button on the days that the template needs to be applied to.
6.	Click DONE COPYING
7.	Click SAVE .



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.



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

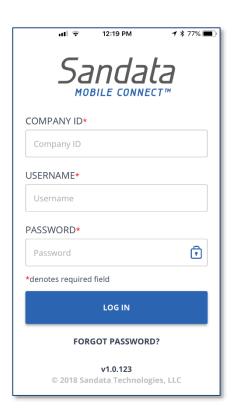
- First and Last name
- Valid email address
- Social Security Number
- Check the **MOBILE User** checkbox in the *Employment* section

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





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

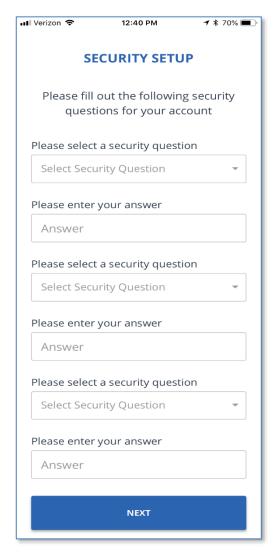
- Company ID: 2-Sandata account # (always the number 2 plus a dash and the agency provider's assigned Sandata account #)
- **Username:** employee's email address
- Password: the temporary password emailed to the employee's email address entered when creating the employee

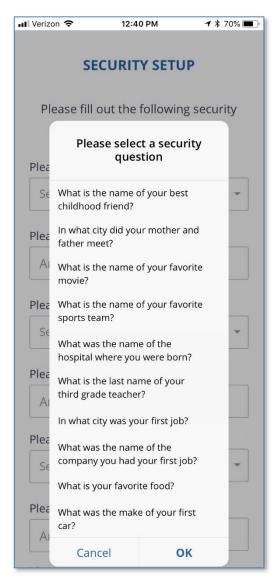


Tapping the lock icon in the **PASSWORD** field displays the password. Displaying the password can help with inital log-in and temporary password entry.



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:



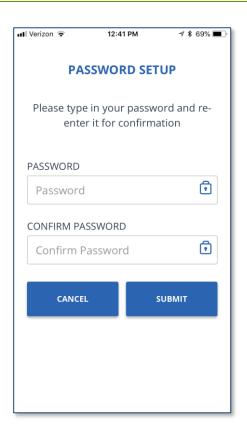


After answering the required security questions, the next screen prompts the employee to create a new password.



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



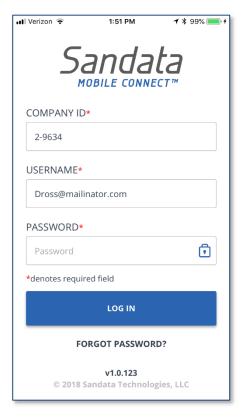


1. Enter the New Password.



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.



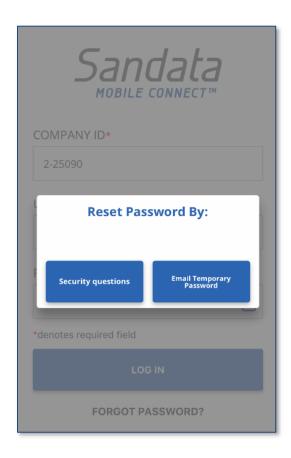
The Login screen displays. The employee uses the new password at the next login.



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.





Initial Login

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.

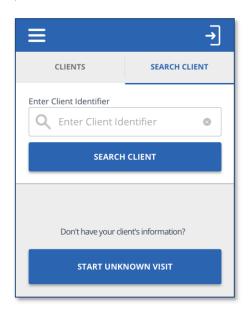


The preferred language must be selected the first time the employee logs in to a new device.



Navigating the Home screen

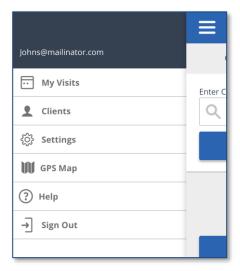
Upon successfully logging in to SMC, the user is presented with the *Home* screen. From this screen, the user is able to:



- 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.

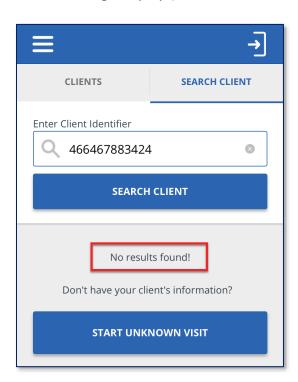
Starting an Unknown Visit



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

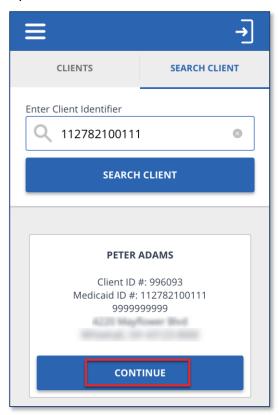
This will be covered after the known client call-in/call-out process.

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

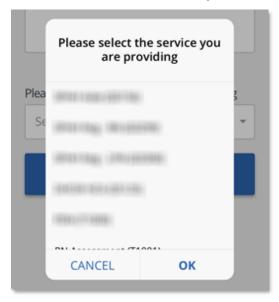




4. Tap the **CONTINUE** button when the search results display.



5. Select the Service from the drop-down list

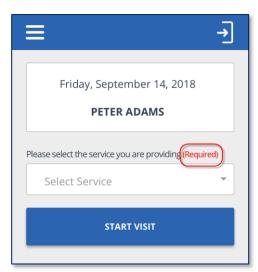




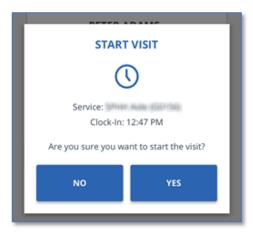
Service Selection Note

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.

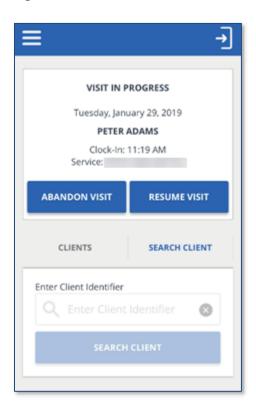


To ensure security, after a configured period of inactivity, the employee is automatically logged out of SMC.



Completing an Unscheduled Visit

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



ABANDON VISIT button



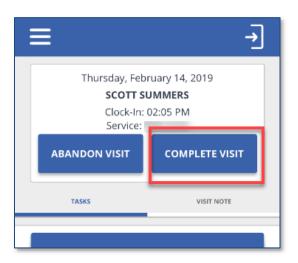
The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.



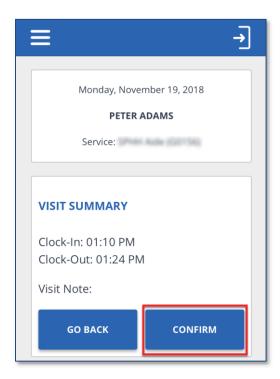
Please be aware that notes are not required. This **Visit Note** field should **not** be used to satisfy documentation requirements. This **Visit Note** field should **not** be used to capture any clinical data.



2. Tap **COMPLETE VISIT**.



3. The Visit Summary screen displays. Tap CONFIRM.

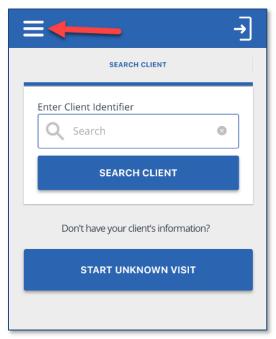


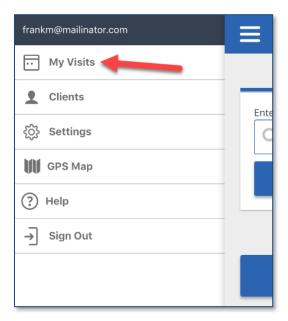


Starting a Scheduled Visit

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.

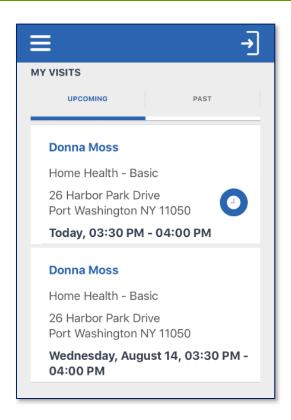




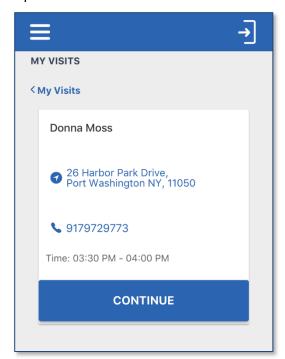
3. Tap the upcoming schedule to start the visit.

Page 7-14



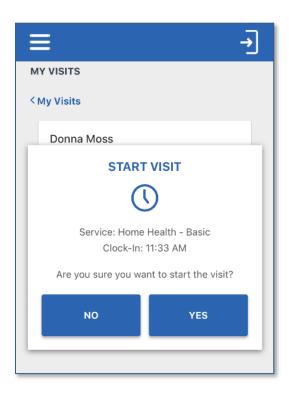


4. Tap the **CONTINUE** button.





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.

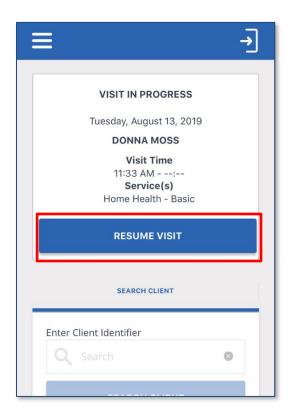


To ensure security, after a configured period of inactivity, the employee is automatically logged out of SMC.

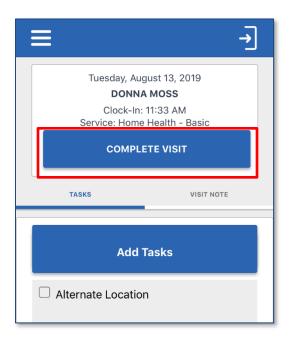


Completing a Scheduled Visit

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



2. Tap COMPLETE VISIT.





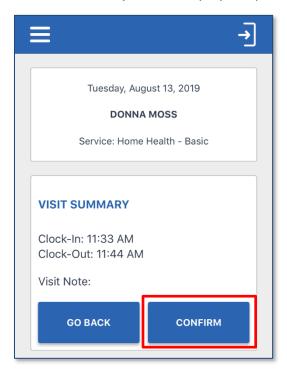


If a visit is conducted away from the client's home, the Alternate Location task should be selected for the visit.



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

3. The Visit Summary screen displays. Tap CONFIRM.



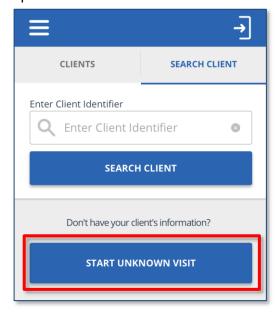


Starting and Completing an Unknown Visit

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*.

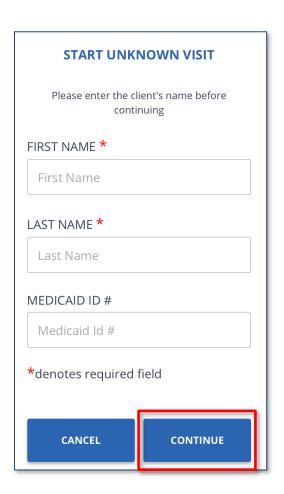
When the employee is unable to select the client by entering the Medicaid ID, he or she will:

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



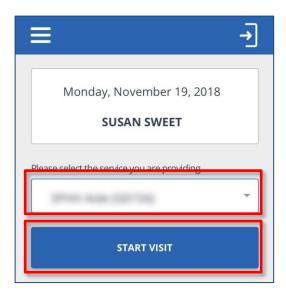
- 3. Enter the following information for the client and tap **CONTINUE** (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
 - FIRST NAME (Required)
 - LAST NAME (Required)
 - **MEDICAID ID** # (Optional if available)



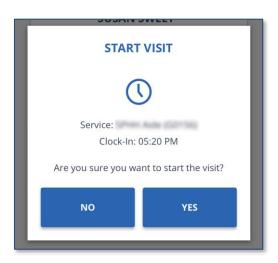


4. Select the Service from the drop-down list and tap START VISIT.





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

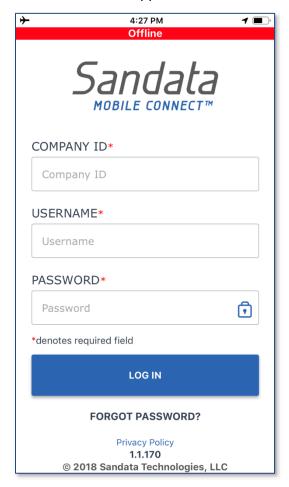
When an employee provides care in an area that does not have cellular or wi-fi service, the employee can still use Sandata Mobile Connect in an offline mode to check-in/check-out for their scheduled visit or start an Unknown Visit.



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

Logging in to SMC Offline

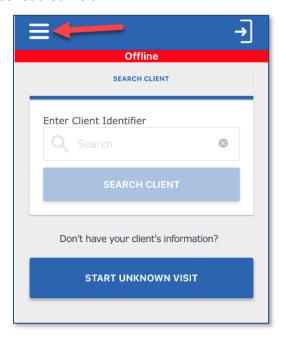
When opening SMC without a cellular or wi-fi connection, the login screen shows in red at the top of the screen that the app is Offline.

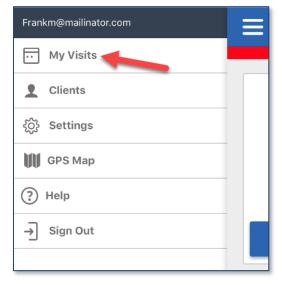




Starting a Scheduled Visit Offline

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



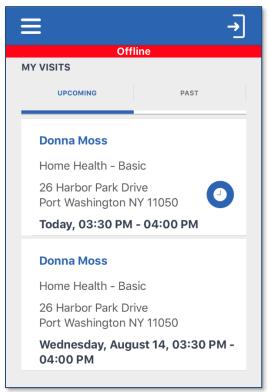




The scheduled visits displayed are as of the last time the employee logged in to SMC in a connected mode. Changes to schedules or new schedules for the employee are not available when SMC is offline.



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.

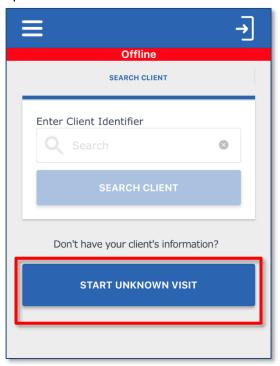


Note that start and end times captured for a visit while SMC is in Offline mode are encrypted and stored on the device. The times are automatically sent to Sandata EVV the next time the employee signs in to SMC in an online/connected mode.



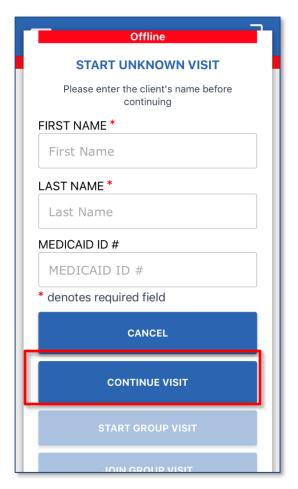
Starting an Unknown Visit Offline

1. Tap **START UNKNOWN VISIT**.



- 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 an 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

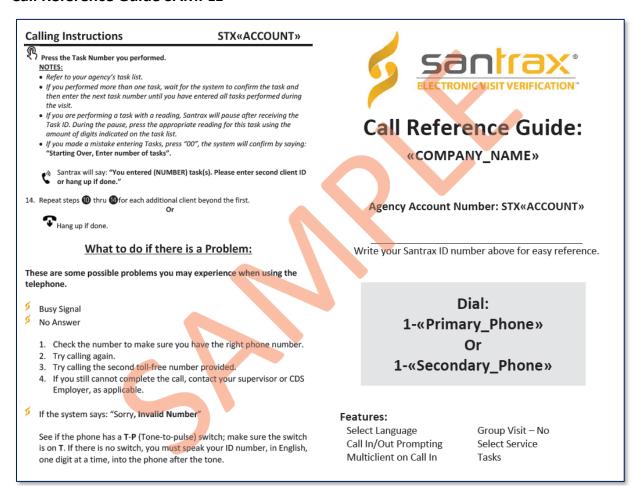
TVV is available as an alternative to the SMC call-in/call-out process. TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, because the device has not yet been delivered, etc.).



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»	Calling Instructions	STX«ACCOUNT»
Calling In: When arriving at the client's home, mainformation: Your Santrax ID. Your Client(s) ID.	ske sure you have the following	Calling Out: When leaving the client's hom information: Your Santrax ID. Your Client(s) ID. The Service ID.	e, make sure you have the following
		The Task ID(s). Follow steps thru to and then	
press four (4). For Chinese Mandarin, Egyptian, please press six (6)." Call prompts are heard in the selected Press the number that corresponds to t	please press five (5). For Arabic languages.	Santrax will say: "Please select (: 9. Press the (2) key to "Cail Out".	1) to call in or (2) to call out."
All prompts for the remainder of the call will Santrax will say: "Welcome, please ent	be heard in that language.		ME). Please enter first client ID or hang up if
 Press the numbers of your Santrax ID o Santrax will say: "Is this a group visit?" 		10. Press the numbers of the client's	ID.
4. Press (2) for not a group visit.		Santrax will say: "Please enter th	
Santrax will say: "Please select (1) to ca	ıll in or (2) to call out."	11. 47 Press the Service ID Number you Refer to your agency's service lis	
Santrax will say: "Received at (TIME). I done."	Please enter first client ID or hang up if	Santrax will say: "You entered (S retry."	ERVICE). Please press (1) to accept, (2) to
6. Press the numbers of the client's ID.		12. Press the one (1) key to accept, o	r press the two (2) key to retry.
Santrax will say: "Please enter second Repeat step 6 for each additional client by		Santrax will say: "Enter number	of tasks."
Or Hang up if done.		13. Press the total number of tasks p	



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 unsuccesful 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.
	Santrax will say: "For English, please press one (1). For Spanish, please press two (2). For Egyptian Arabic, please press three (3). For Russian, please press four (4). For Chinese Mandarin, please press five (5). For Somali, please press six (6).
	*Each prompt will be heard in its respective language.
2	Press the number that corresponds to the desired language.
	Santrax will say: "Welcome, please enter your Santrax ID."
3	Press the numbers of your Santrax ID on the touch tone phone.
	Santrax will say: "Press 1 to call-in or 2 to call-out."
4	Press the one (1) key to "call-in." **
	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)
	** 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.
	Santrax will say: "Please enter first client ID or hang up if done."
	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.
	Santrax 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 Egyptian Arabic, please press five (5). For Russian, please press six (6).
	*Each prompt will be heard in its respective language.
2	Press the number that corresponds to the desired language.
	Santrax will say: "Welcome, please enter your Santrax ID."
3	Press the numbers of your Santrax ID on the touch tone phone.
	Santrax will say: "Press 1 to call-in or 2 to call-out."
4	Press the two (2) key to "call-out."
	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)
	Santrax will say: "Please enter the Service ID."
5	Press the service ID performed (Service IDs and Tasks are listed on a separate sheet)
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."
6	Please press 1 to accept, 2 to re-enter
	Santrax will say: "Enter number of tasks."
7	Enter the total number of tasks performed for the client.
	Santrax will say: "Enter task ID."
	Enter the ID of the task performed. Santrax will playback the task description.
8	(If more than one task was entered as the total, Santrax will prompt for the next task ID. Repeat this step until all tasks are entered.



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.

6/11/2020



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.

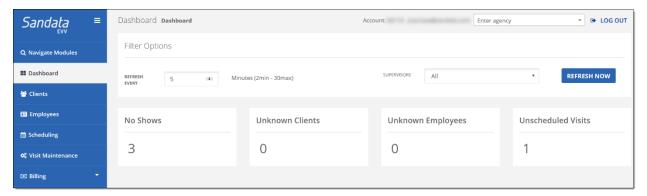


Sandata EVV is not used for billing and does not guarantee payment for a visit.

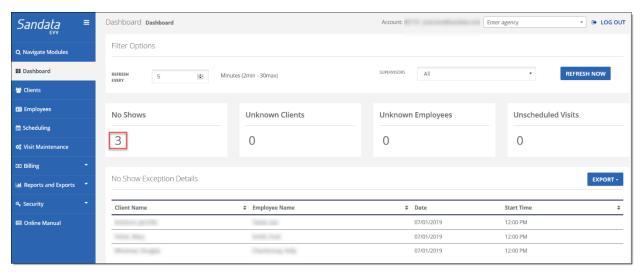


Sandata EVV Dashboard

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*.

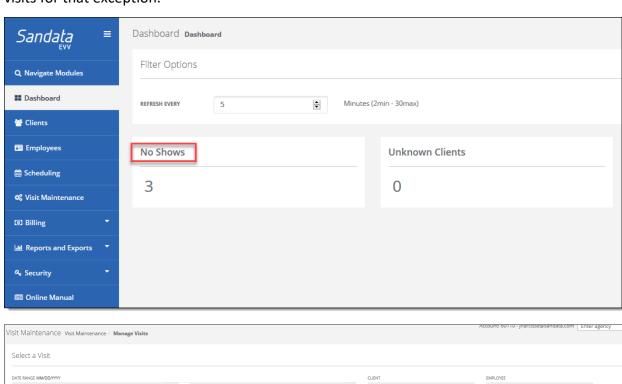


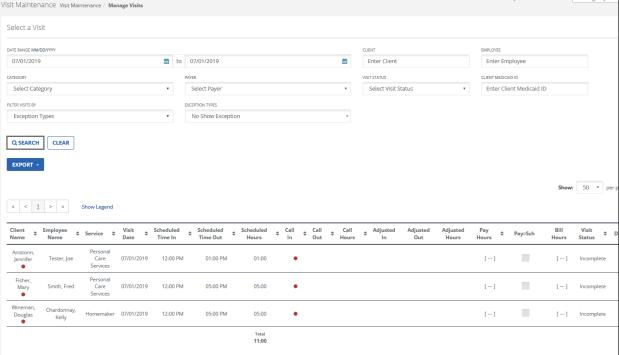
Click the exception category total to display a listing of the visit exception details for that specific exception.





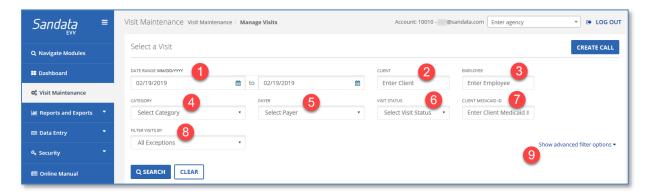
Click the exception category name to link to the *Visit Maintenance* module to view and edit the visits for that exception.







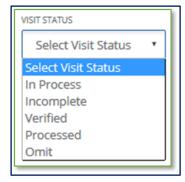
Visit Maintenance – Main Screen



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:



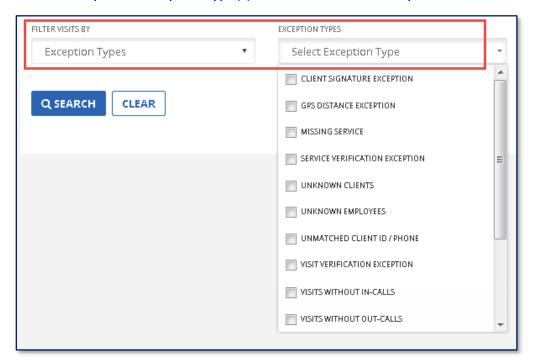
Status	Description
In Process	A visit has started and not yet completed
Incomplete	A visit has exceeded a 24-hr. period and is still missing a call-in/call-out
Verified	A visit that does not contain any exceptions
Processed	A visit that does not contain any exceptions and has been returned to the claims 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.

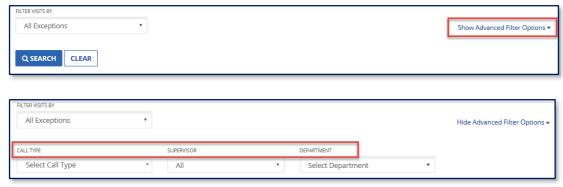


Exception	Description
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the SMC call-in or Telephony call-out.
LOCATION REQUIRED	Occurs when the 'Alternate Location' task is selected for a visit if the phone number the TVV call was from is not associated with the client; the GPS coordinates captured for the call exceed the allowed distance tolerance or the visit contains manual in and out calls.
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.



Exception	Description
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 telephone call does not match to any known employee.
UNMATCHED CLIENT PHONE/ID	Identifies when a client ID is entered during a telephone 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.
VISIT WITHOUT OUT-CALLS	Identifies 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**.

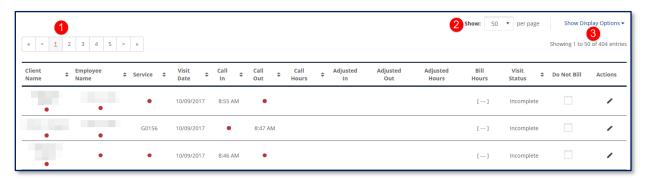


- **Call Type**: Filter visits to show only **MVV** or **Manual** calls
- Supervisor: This filter is available if clients are grouped by supervisor/coordinators
- **Department**: This filter is available if employees are by departments



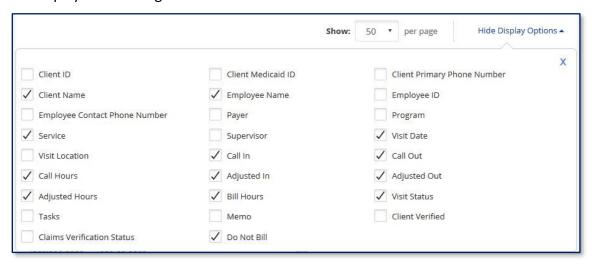
Search Results – Understanding the Visit Grid

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.



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.





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.

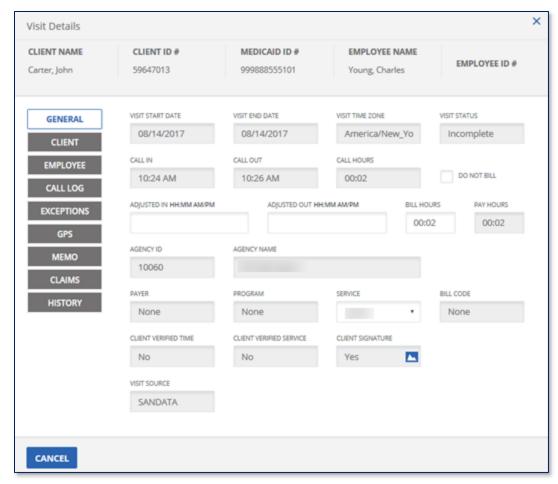
The top of *Visit Details* screen contains the **CLIENT NAME**, **CLIENT ID**, **MEDICAID ID**, **EMPLOYEE NAME** and **EMPLOYEE ID** information. There are also tabs on the left which display various details of the visit.



 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.





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



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

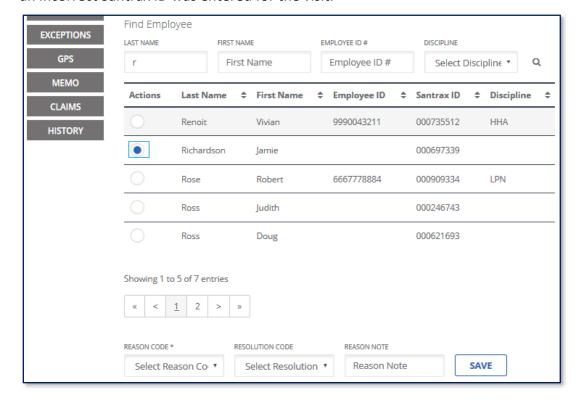




• EMPLOYEE: This screen displays the employee details such as: EMPLOYEE EMAIL, SANTRAX ID, ADDRESS and PHONE.

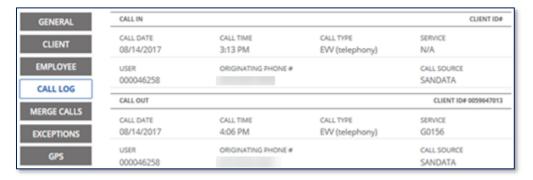


The screen also includes an option to change the employee for the visit, in instances when an incorrect Santrax ID was entered for the visit.

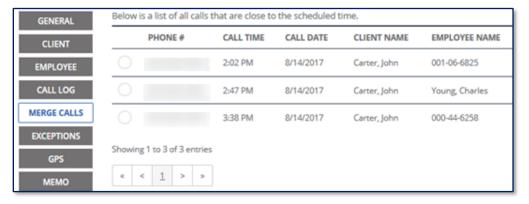




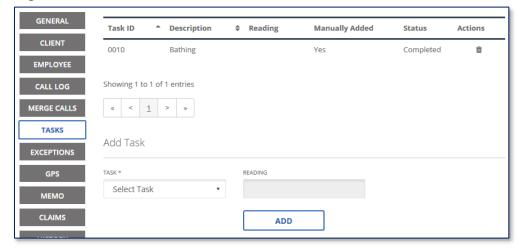
 CALL LOG: This screen shows the details of the call-in/call-out times and the type of call (Mobile, Telephony, Manual). If a visit is missing a call, a call can be manually added from this screen.



• 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.

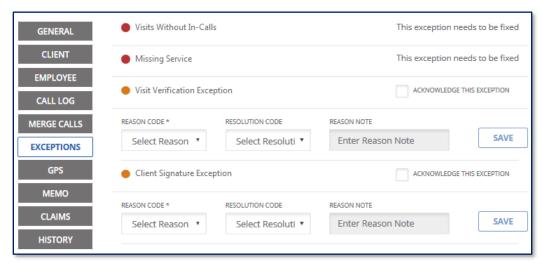


TASKS: This screen shows the tasks that were entered by the employee during the visit. A
user with the appropriate permissions can add additional tasks to the visit or delete
existing tasks if needed.

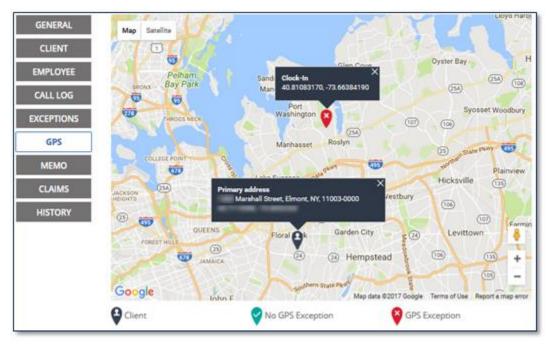




• EXCEPTIONS: This screen lists all the visit exceptions for the visit, along with the available option to resolve each exception.



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

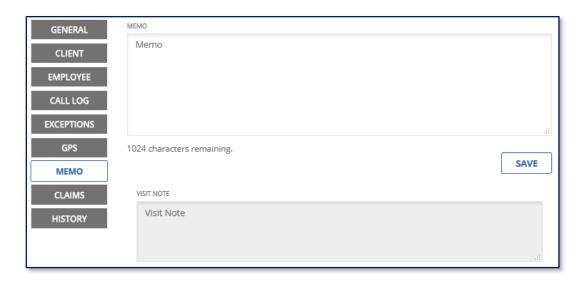


 MEMO: This screen allows the user to make a note and display notes previously entered related to the visit. It also includes a Visit Note screen which displays notes entered into SMC during call-out.





This information should not be used to fulfill documentation requirement.

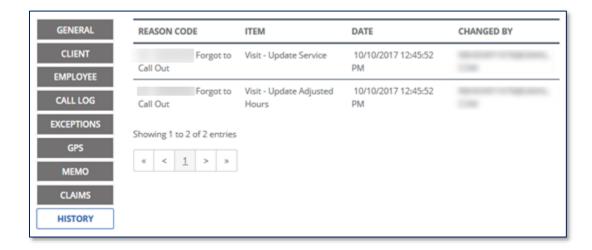


• *CLAIMS*: This screen shows the batch, transaction and date/time each time the visit was returned to the adjudication system.



• *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.





Identifying Exceptions

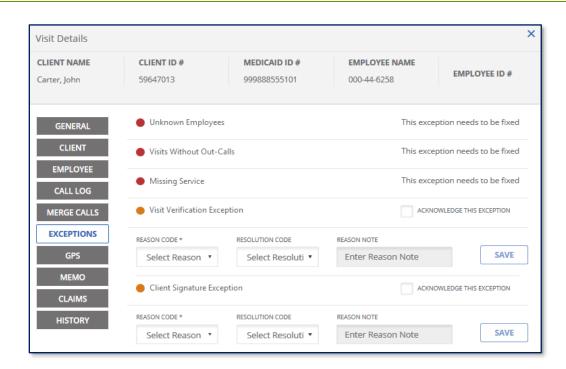
Visit exceptions are indicated by a colored circle under one or more columns where the exception exists. The columns are: **Client Name, Employee Name, Service, Call In** or **Call Out**.

- 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).



- 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.







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.

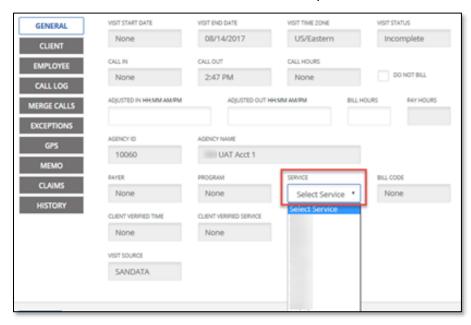
Missing Service Exception

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.



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



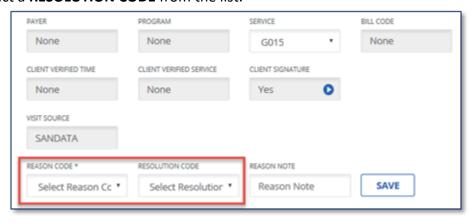


3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit.



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

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

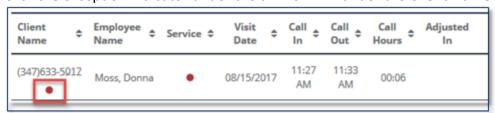


Click SAVE.

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.

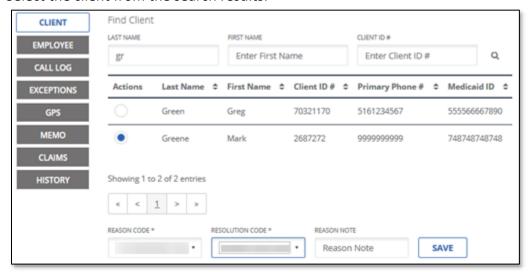




2. Use the search fields to search for the client.



3. Select the client from the search results.



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.



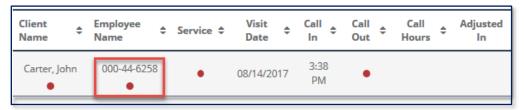
6. Click SAVE.



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.



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



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.



6. Click SAVE.



Unmatched Client Phone/ID Exception

Identifies when a client ID is entered during a telephone 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.

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



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

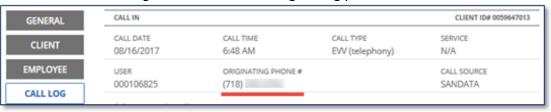


Some reason codes require a **REASON NOTE** before clicking **SAVE**.

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



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





Location Required Exception

Identifies when a caregiver has provided services elsewhere in the community and not the client's home. 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. Click the exception indicator under the Visit Status column.



2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Location Required exception line.



- 3. Select a **REASON CODE** from the list.
- 4. Enter the location of where the services were provided.
- 5. Click SAVE.

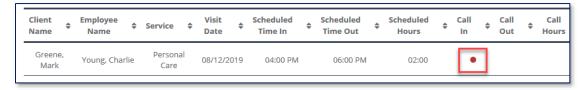




Visit Without Calls

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.

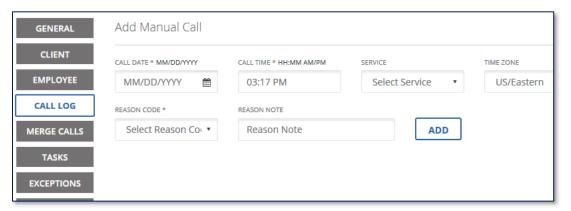
1. Click the exception indicator under the **Client Name** column.



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.



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



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.



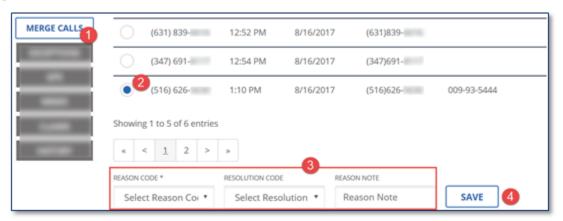




When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

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



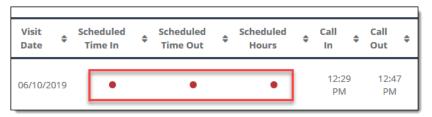
- 1. Click the **MERGE CALLS** link to see if there are any available calls that can be merged to the visit.
- 2. Click the radio button next to the line to select the call, if there is a call to merge.
- 3. Select the REASON CODE, RESOLUTION CODE and REASON NOTE, if needed.
- 4. Click SAVE.



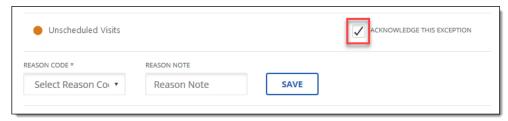
Unscheduled Visit Exception

Identifies when a call was received that does not match to any schedule in the system or there are no schedules to associate the call with. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

 Click the exception indicator under the Scheduled Time In/Time Out, or Scheduled Hours columns.



2. Check the **ACKNOWLEGDGE THIS EXCEPTION** checkbox on the Unscheduled Visit Exception line.



3. Select a **REASON CODE** from the list that best explains why a visit was not scheduled.



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

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.

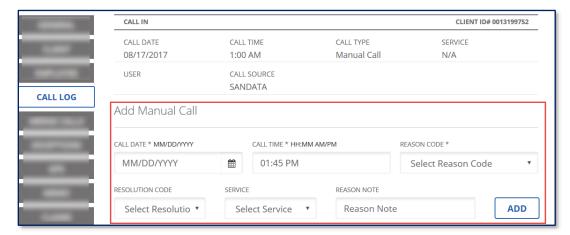




It is recommended to go to the *Merge Calls* screen first to see if there are any available calls that can be merged. If there are none, the user can go back to the *Call Log* to manually add a call time. See steps to add a manual call.

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.



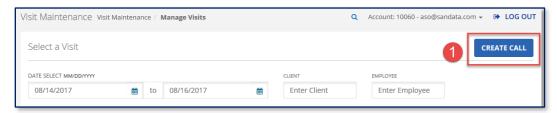
- 1. Click CALL LOG.
- 2. Enter the appropriate information into the fields.
- 3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if needed.
- 4. Click ADD.



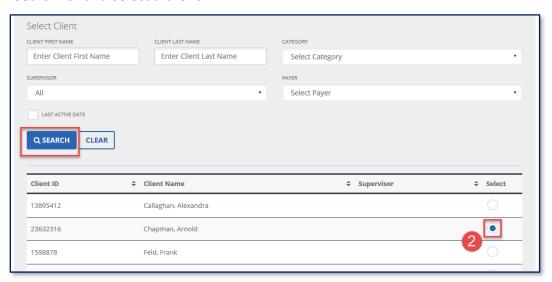
Create Call

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.



2. Search for and select a client.

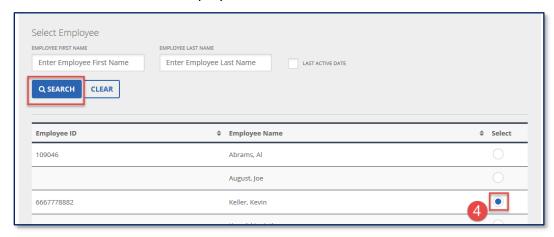


3. Click Next.





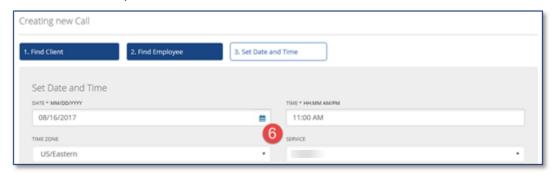
4. Search for and select an employee.



5. Click Next.



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



7. Click FINISH.





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.



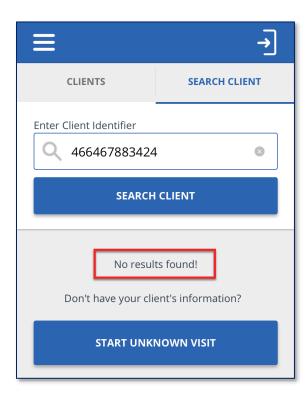
The Group Visit option allows one employee to call-in and call-out for one or more client visits at the same time, or multiple employees to call-in and call-out for one or more client visits at the same time. Group visits can be captured via SMC, TVV and EVV Visit Maintenance.

Sandata Mobile Connect (SMC)

Starting a new Group Visit

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

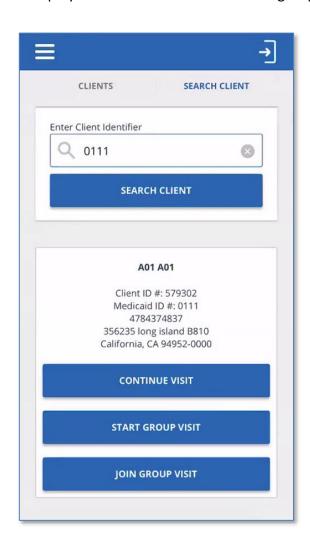
- 1. Locate the EVV Device or the employee's personal device.
- 2. Log in to SMC.
- 3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or the system generated client ID of the client.
- 4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any 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.

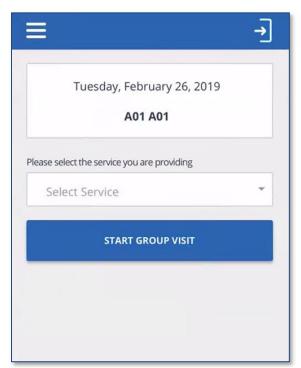




1. Tap START GROUP VISIT.



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





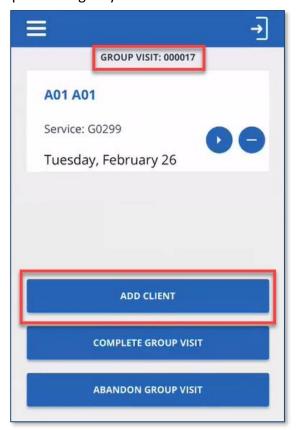
1. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



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.

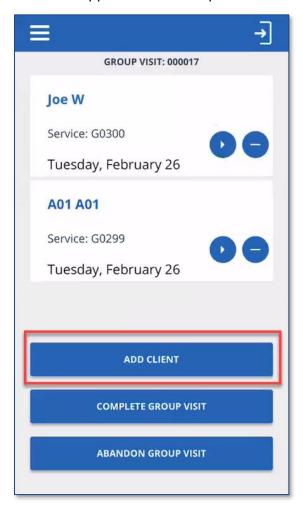
The employee may add additional clients they are providing care for the group visit.

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.



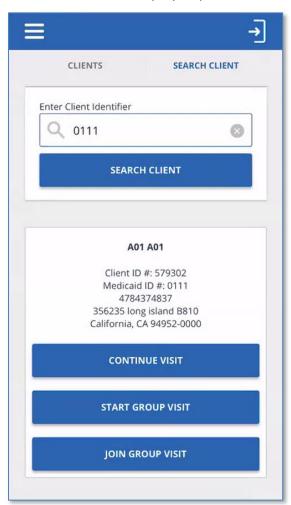
A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.



Joining a Group Visit

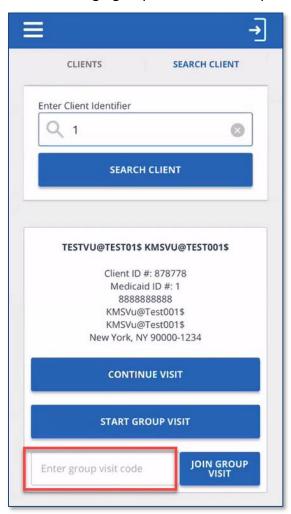
If an employee needs to join an existing group visit upon arriving at a location, the employee will:

- 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.



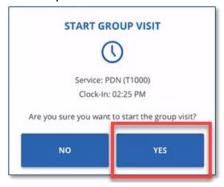
- The Group Visit code must be 6-digits in length.
- The code is only valid for use within the same agency.
- If an invalid code is entered, the following message is displayed.



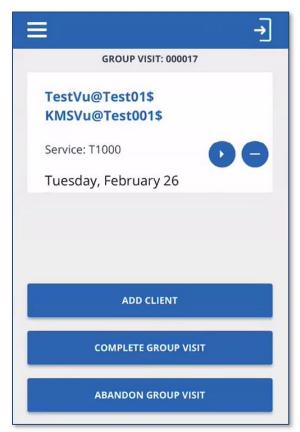




7. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



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

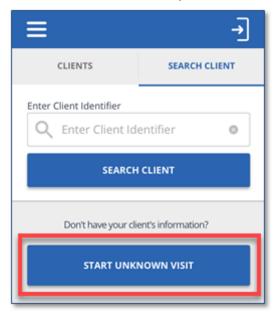




Adding an Unknown Client to a Group Visit

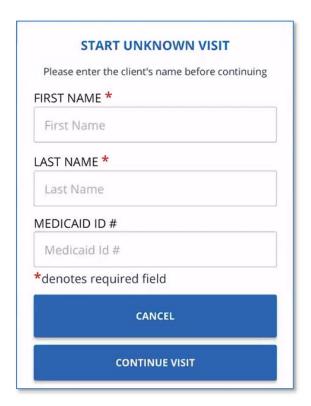
If the Medicaid ID or Client ID entered when searching for a client does not return any results, the employee can add an unknown client to the group visit. An employee can only add a maximum of one unknown client to a group visit.

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

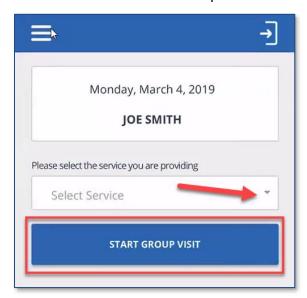


- 2. Enter the required information and tap **CONTINUE VISIT**.
 - **FIRST NAME** (Required)
 - LAST NAME (Required)
 - **MEDICAID ID** # (Optional if available)



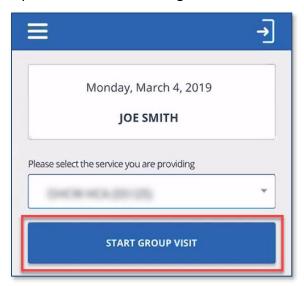


3. Select the Service from the drop-down list and tap **START GROUP VISIT**.

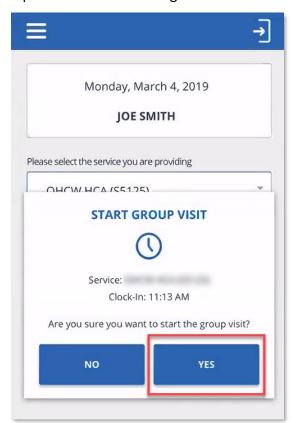




4. Tap **START GROUP VISIT** again.



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





Completing a Group Visit

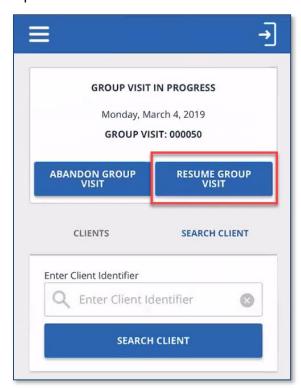
An employee can complete his or her visits within a group individually or complete all visits within a group together.



Completing all visits within a group at the same time requires that the visit process is the same for all the clients (e.g. all visits do not require client confirmation during the call-out process). If one or more clients have a different call-out process, the employee must complete the visits individually.

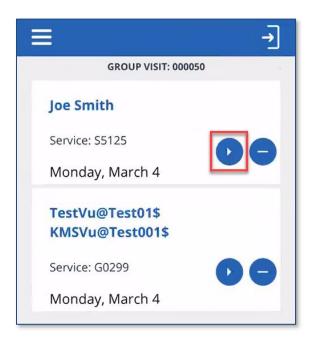
Completing a visit within a Group Visit Individually

- 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.



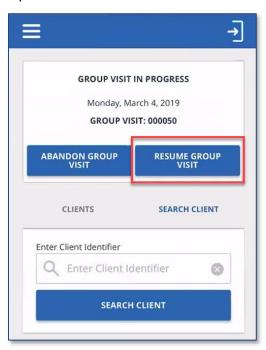
Tapping the 'dash' icon () allows the employee to abandon the individual visit. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

6/11/2020

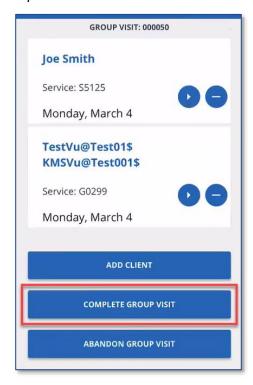


Completing all visits within a Group Visit Together

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



3. Tap **COMPLETE GROUP VISIT**.





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

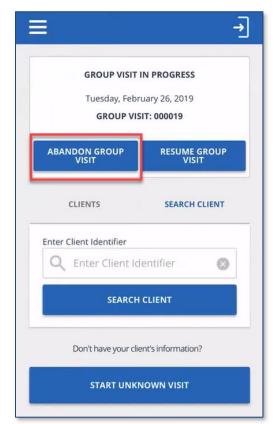




When completing a group visit, the employee is completing his or her client's visits.

Abandoning a Group Visit

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





1. Tap YES to confirm abandoning the group visit.



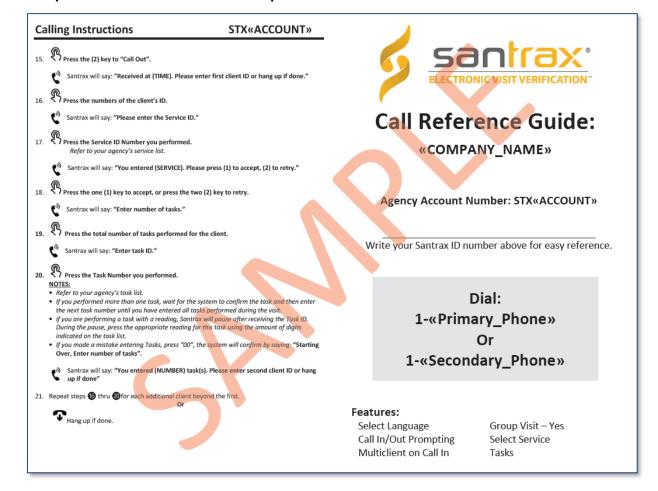


When abandoning a group visit, all of the employee's visits within the group appear in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.



Telephonic Visit Verification

Group Visit Call Reference Guide Sample





alling Instructions STX«ACC	UNT» Calling Instructions	STX«ACCOUNT»
ling in: When arriving at the client's home, make sure you have the following info Your Santrax ID. Your Client(s) ID. Group visit code if available.	Press (1) to add a client. **Press (1) to add a client. **Osantrax will say: "Please select (1) to ca	ll in or (2) to call out."
Group visit code if available. Dial any of the toll-free numbers assigned to your agency. If you are experiencing difficulties with the first toll-free number, please use the number. The Santrax system will say: "For English, please press one (1). For Span two (2). For Somali, please press three (3). For Russian, please press for Chinese Mandarin, please press five (5). For Arabic Egyptian, please press for Chinese Mandarin, please press five (5). For Arabic Egyptian, please press for the remainder of the toll will be heard in that language. Press the number that corresponds to the language you wish to hear. All prompts for the remainder of the coll will be heard in that language. Santrax will say: "Welcome, please enter your Santrax ID." Press the numbers of your Santrax ID on the touch tone phone. Santrax will say: "Is this a group visit? Press (1) for Yes or (2) for No." Press (1) for group visit. (3) To join an existing group visit. Press (1) to start a new group visit tode." Santrax will say: "You will start a group visit code."	Press the (1) key to "Call In". Santrax will say: "Received at (TIME). Press the (1) key to "Call In". Santrax will say: "Received at (TIME). Press the numbers of the client's ID. Santrax will say: "Please enter second to the client's ID. Repeat step of for each additional client be than gup if done. Calling Out: When leaving the client's home, make Your Santrax ID. The Service ID. The group visit code. The Task ID(s). 11. Follow steps of thru to and then continue to join a group visit, or (4) to exit go to join a group visit, or (4) to exit go to continue your group visit.	client ID or hang up if done." Silent ID or hang up if done." yound the first. Or sure you have the following information: see group visit, (2) to continue to your group visit menu."
new group visit with visit code (GROUP CODE)." Continue to step 3. Santrax will say: "You we group visit with visit code." Santrax will say: "You we group visit with visit code." "Please press (1) to add a client to the group visit, (2) to complete a visit to hear the group visit code, (4) to abandon this whole group visit or har	press (1) to add a client to the group visit code, (4) to abandon the group visit code, (4) to abandon the to end this call." NOTE: if you made a mistake and need all visits in this group, press (4) to abandon a client, (3) 14.	up visit with visit code (GROUP CODE). Please sit, (2) to complete a visit for a client, (3) to hea is whole group visit or hang up if you would like to discard <u>all</u> data you have previously entered fo don the whole group visit.

Group Visit Call Process – Multi-Language Line

Call-In		
1	Dial either toll-free number.	
	Santrax will say: "For English, please press one (1). For Spanish Egyptian Arabic, please press two (2). For Somali, please press three (3). For Russian, please press four (4). For Chinese Mandarin Chinese, please press five (5). For Egyptian Arabic, please press six (6). *Each prompt will be heard in its respective language.	
2	Press the number that corresponds to the desired language.	
	Santrax will say: "Welcome, please enter your Santrax ID."	
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).	



	Santrax will say: "Is this a Group Visit, press 1 for Yes or 2 for No."
4	Press 1 for Yes.
	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."
5	Press 1 to start a new group visit.
	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."
6	Press 1 to add a client.
	Santrax will say: "Press 1 to call-in or 2 to call-out."
7	Press 1 to call-in.
	Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."
8	Enter the client ID for the first client being added to the group visit.
	Santrax will say: "Enter second client ID or hang up if done." *
	*Repeat step 9 for each client being added to the group visit.
9	Hang up.



all-O	ut
1	Dial either toll-free number.
	Santrax will say: "For English, please press one (1). For Spanish Egyptian Arabic, please press two (2). For Somali, please press three (3). For Russian, please press four (4). For Chinese Mandarin Chinese, please press five (5). For Egyptian Arabic, please press six (6).
	*Each prompt will be heard in its respective language.
2	Press the number that corresponds to the desired language.
	Santrax will say: "Welcome, please enter your Santrax ID."
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: "Is this a Group Visit, press 1 for Yes or 2 for No."
4	Press 1 for Yes.
	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."
5	Press 2 to continue the group visit.
	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."
6	Enter the 6-digit group visit code.
	Santrax will say: "You will continue the group visit with visit code [XXXXX]. Please press 1 to add a client to the group visit, 2 to complete visit for a client, 3 to hear th group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."
7	Press 2 to complete the visit.
	Santrax will say: "Please select 1 to call-in or 2 to call out."
8	Press 2 to call-out.
	Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."
9	Enter the client ID number.
	Santrax will say: "Please enter the Service ID."
10	Press the ID of the care performed.
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."



11	Press the 1 to accept.
	Santrax will say: "Enter number of tasks"
12	Press the total number of tasks performed for the client. (hang up if not required)
	Santrax will say: "Enter task ID"
13	Press the task ID performed.
	Santrax will repeat the description for the ID entered.
14	Hang Up.



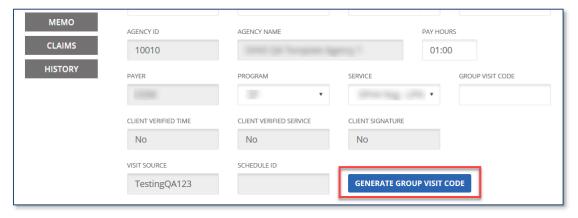
Visit Maintenance - Generating/Editing Group Visit Codes



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.



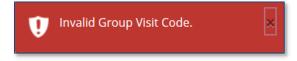
Editing a Code

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.





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



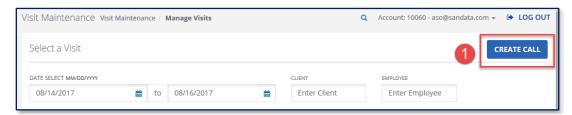
Agency Provider Participant Guide



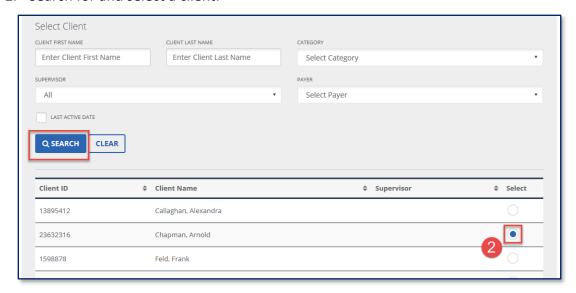
Create Call

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.



2. Search for and select a client.

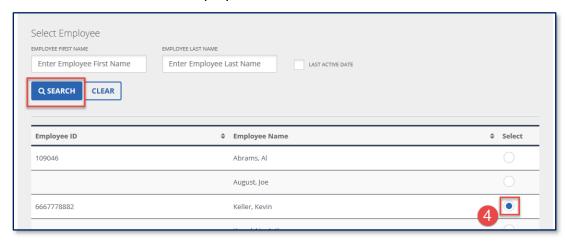


3. Click Next.





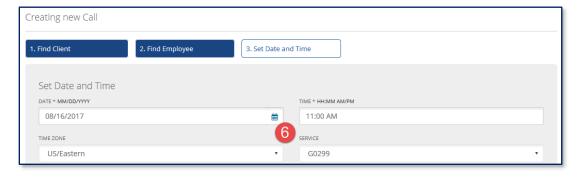
4. Search for and select an employee.



5. Click Next.

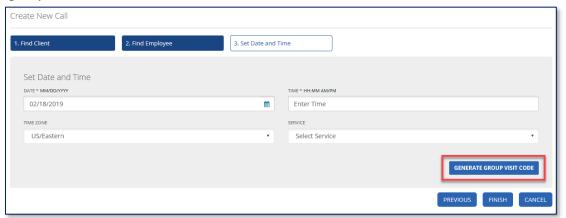


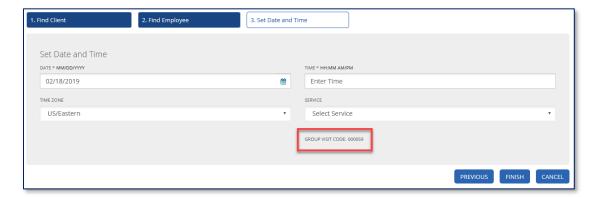
6. Enter the **DATE***, **TIME*** and **SERVICE** details.





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





7. Click FINISH.





10 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

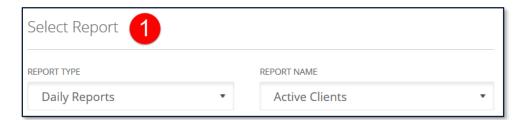
1. Select Report

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.

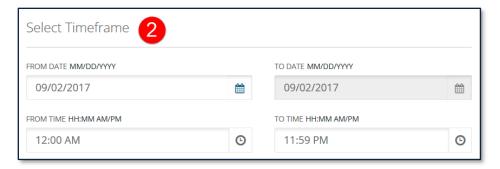
- **Daily**: These reports display results for a selected single date
- Date Range: These reports display results for a selected date range





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

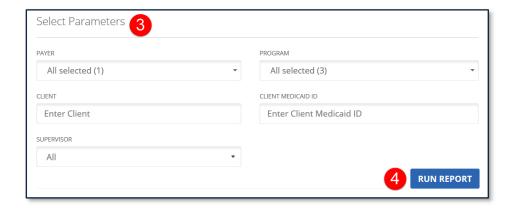
Filter	Description	
FROM DATE	Enter the beginning date of the date range	
TO DATE	Enter the ending date of the date range	
FROM TIME	Enter the beginning time of the timeframe	
TO TIME	Enter the ending time of the timeframe	



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



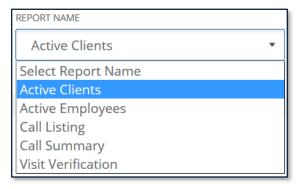
Follow along with the instructor to run a report.

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



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



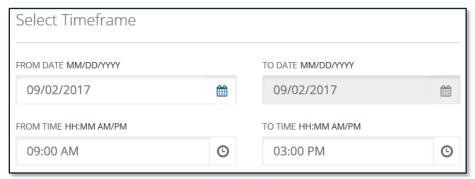




Available reports differ depending upon which report type is selected.



3. Enter Select Timeframe information.

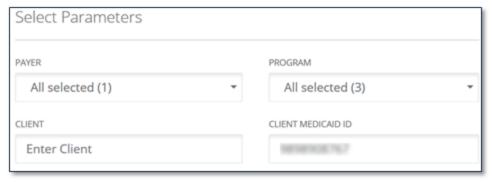




For *Daily* reports, the default is always the current day's date. For *Date Range* reports, the default is the past two (2) weeks. Both types of reports can be filtered further by entering time constraints.

Maximum date range is 730 days.

4. Set the desired search Parameters.





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.

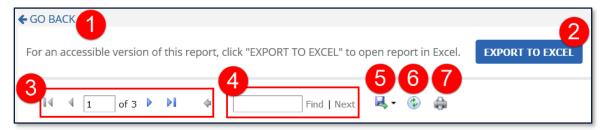
To reduce the size of the report and ensure efficiency when running reports with longer date ranges or containing lots of data, it is best to select other parameters such as: **CLIENT** or **CLIENT MEDICAID ID**.

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

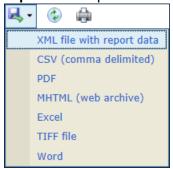




Navigating a Report



- 1. **Go Back**: This links 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.

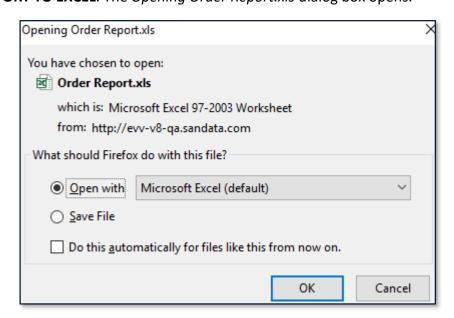
When a column is sorted, a visual indicator (\bigcirc / \bigcirc) reveals which column and in which order it is sorted.

Export a Report



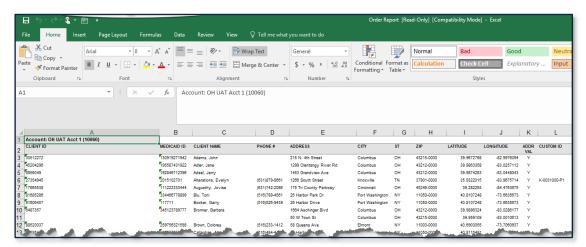
Follow along with the instructor to export a report.

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





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





On Your Own: Run the Client Summary Report



Sample Available Reports

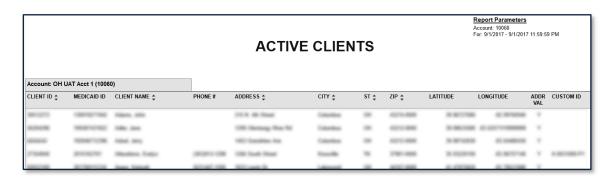
Role and security level determine the reports available. The reports support monitoring of visits in the field to ensure that clients are receiving the services as required. The reports also help put together the missing pieces in Visit Maintenance.

Daily Reports

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



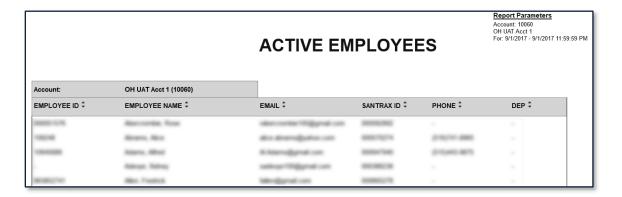
Use this report to view all client's phone numbers, active addresses, identify whether or not an address was verified by GPS, the Medicaid ID (for SMC). Client ID (for TVV) and the custom ID field for cross reference.



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).





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.



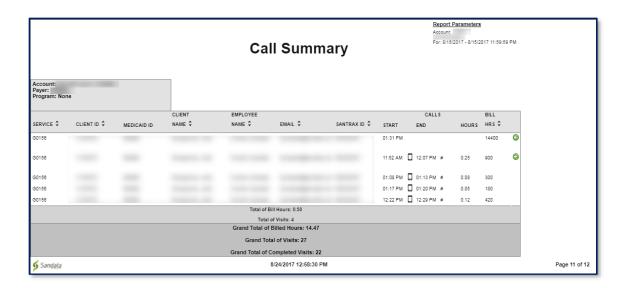
Use this report to review call activity for the day and time selected. This report allows users to monitor trends in call activity and identify call that require editing, verification or exception handling.



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.

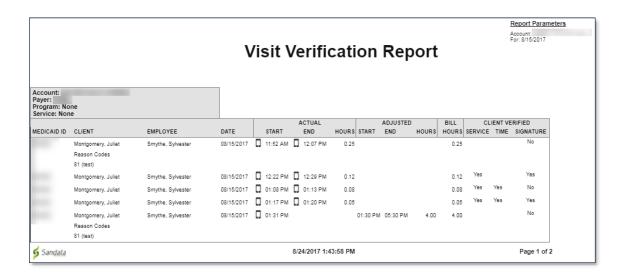




5. **Visit Verification Report:** This report provides information for visits on a given date. Reported information for each visit includes all call, adjusted and client verification information.



Use this report to view all information about a visit.





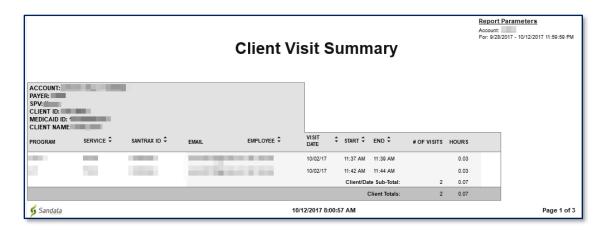
Date Range Reports

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.



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.



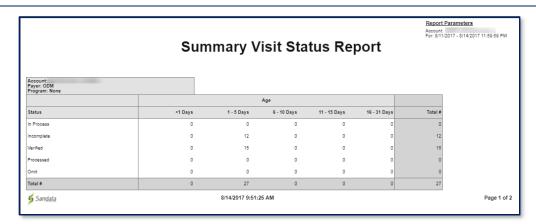
Use this report to review a detailed overview of all visits within a selected date range. It assists in easily identifying visits that have statuses that need to be corrected. The report can also be printed based on exceptions or visits that need exception handling in order to get them to a verified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



3. **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.

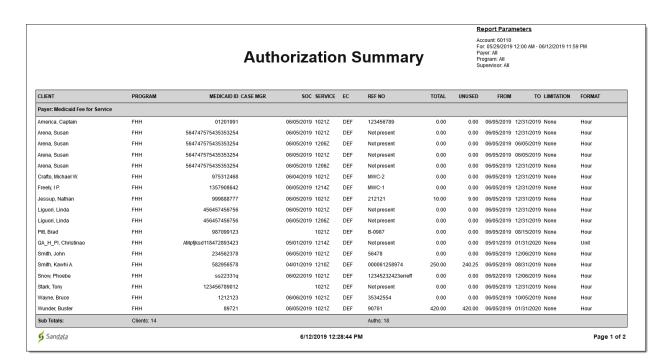




4. **Authorization Summary Report**: This report displays a summary of client authorizations sorted by payer. Authorizations specify the number of units, visits, or hours for a service and time period.



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



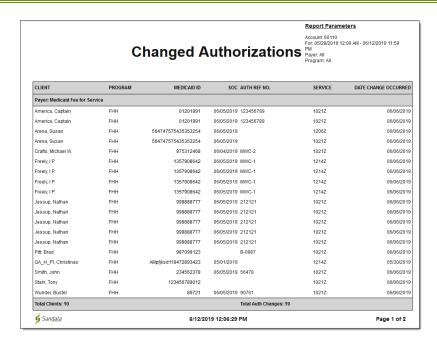
Changed Authorizations Report: This report shows changes that have been made to existing authorizations.



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

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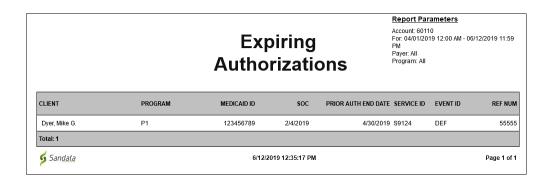




6. **Expiring Authorizations Report**: This report allows you to review all authorizations that are ending within the specified date range.



Use this report to determine whether new authorizations need to be requested for client care.



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.

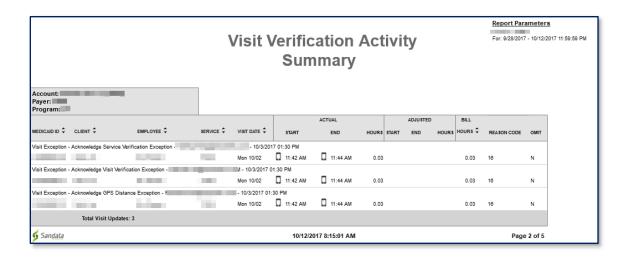




8. **Visit Verification Activity Summary Report:** This report contains a list of modifications for each visit. Only the modified visits are included in this report and the report is sorted by the user who performed the Visit Maintenance.



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.





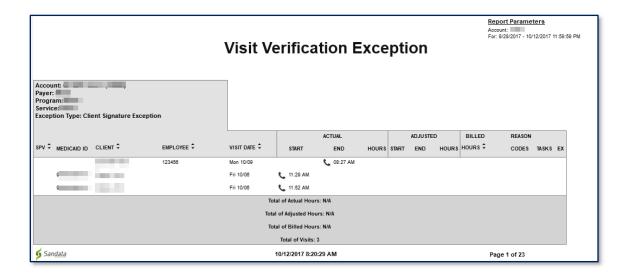
9. **Visit Verification Exception Report:** This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Example: GPS Distance Exception.



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.

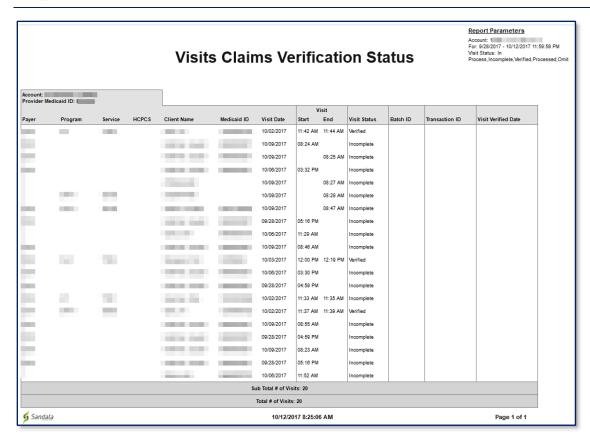




10. **Visit Claims Verification Status Report:** This report lists all visits within selected date range regardless of the visit's status and shows the last time each visit was returned to the payer for validation.



Use this report to track what visits have been matched to the claim for a visit or the remaining balance to reconcile outstanding claims.



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11 Appendix



Glossary

Α

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

D

Dashboard Real-time status of the current day's visit exceptions

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.

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 Sandata's Electronic Visit Verification system

Security 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