Sandata
TECHNOLOGIES

Wisconsin Department of Health Services Electronic Visit Verification (EVV)

Provider Agency Training Guide

July, 2020
v 1.9

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About this Course

This Instructor-led Training (ILT) course introduces the Sandata Electronic Visit Verification (EVV) system and is meant to show a user how to access and use the different modules of the system. The instructor will use this guide to lead each lesson with an overview of the topic followed by a demonstration and hands-on practice (where possible) of the 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:
  - View/Enter clients
  - View employees
- Explain the purpose and basic functionality of Sandata Mobile Connect (SMC), Telephonic Visit Verification (TVV) and Fixed Visit Verification (FVV)
- Use the *Dashboard* module to view real-time exceptions
- Use the *Visit Maintenance* module to manage, correct visit issues 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.
	Used to indicate workflow.
	Use to highlight any risk management points.
	Used to highlight a key point of which the user should take notice.
	Used to indicate a tip and/or shortcut.
	Used to indicate instructor demonstration.
	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 (User Set Up) • Manage Users • Creating Users
30	Client Module • Client Entry and Edit
10	Employee Module • Employee View
60	SMC / TVV / FVV • Device Call-In/Call-Out • Telephony Call-In/Call-Out • Fixed Visit Call
75	Visit Maintenance • Accessing Visit Maintenance • Understanding Filter and Sort Options • Understanding Visit Exceptions • Reviewing and Resolving Visit Exceptions
45	Group Visits • Starting a Group Visit • Completing a Group Visit • Create and Edit Group Visits in Visit Maintenance
20	Reports • Accessing Reports • Reviewing Report Types • Exporting Report Types

30	Wrap-up • Assessment & Evaluation • Wrap-up Assessment • Training Evaluation • Next Steps

Overview/Objectives

This training is an in-depth review of the Sandata EVV system, pointing out features 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
- SMC, TVV and FVV
- Digital Dashboard and Visit Maintenance
- 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 an account that is designed specifically for training. We will not use real clients; therefore, the data cannot be harmed. The training account is a close copy of the live 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 main 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
EVV	Electronic Visit Verification

Introduction

Congress established a January 1ST, 2021 requirement for all states to use an EVV system, in accordance with the 21st Century Cures Act.

EVV is an electronic system that verifies when provider visits occur and documents the precise time services begin and end.

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 the Sandata EVV system. It is a web-based system accessed via Mozilla Firefox, Google Chrome or Microsoft Edge 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 Mozilla Firefox, Google Chrome or Microsoft Edge on a rolling basis. 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

The Sandata EVV system consists of the following modules.

- *Navigate Modules*
- *Dashboard*
- *Clients*
- *Employees*
- *Visit Maintenance*
- *Reports*
- *Security*
- *Online Manual*

Log-in Screen

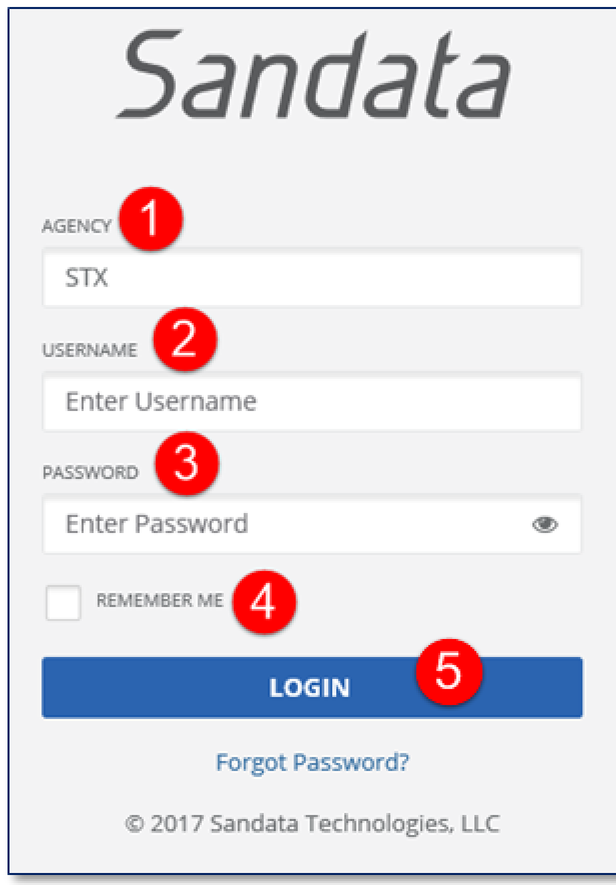
How to Log In

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

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

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

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



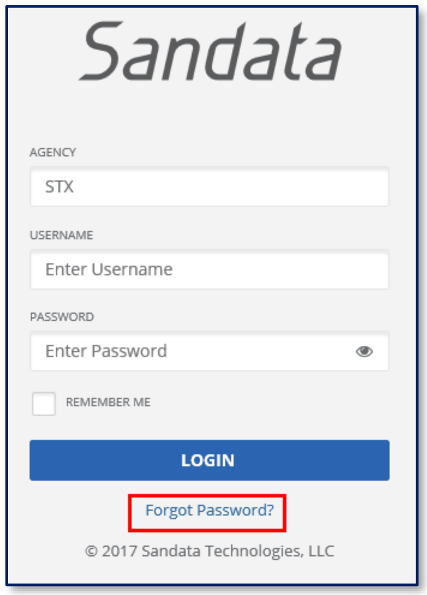
TIP **REMEMBER ME** – When checked, preserves the last username entered.

How to Reset a Forgotten Password

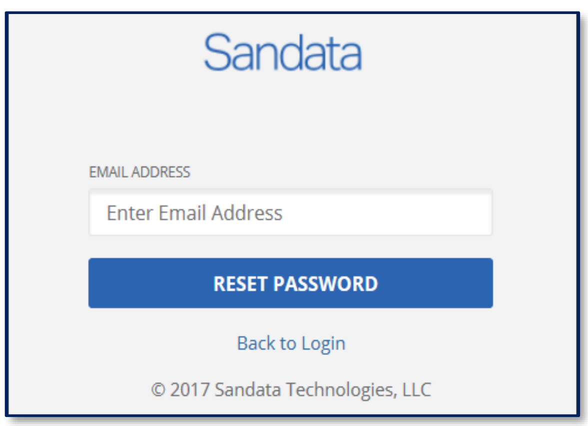
Passwords need to be reset at regular intervals, based on program requirements. A user will begin receiving prompts 10 days before their password expiration date to reset the password.

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).

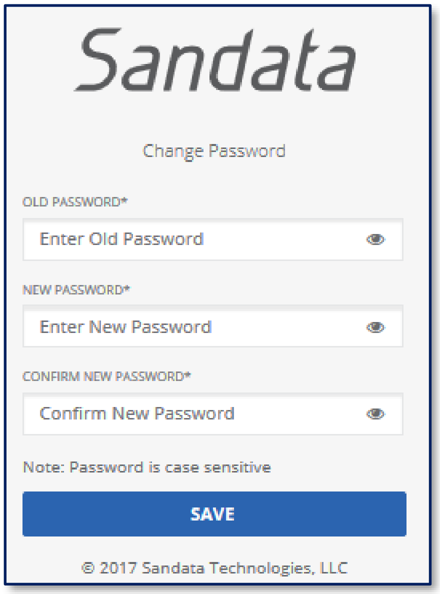
1. Click **Forgot Password?** A window opens to enter the email address to receive a temporary password.



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



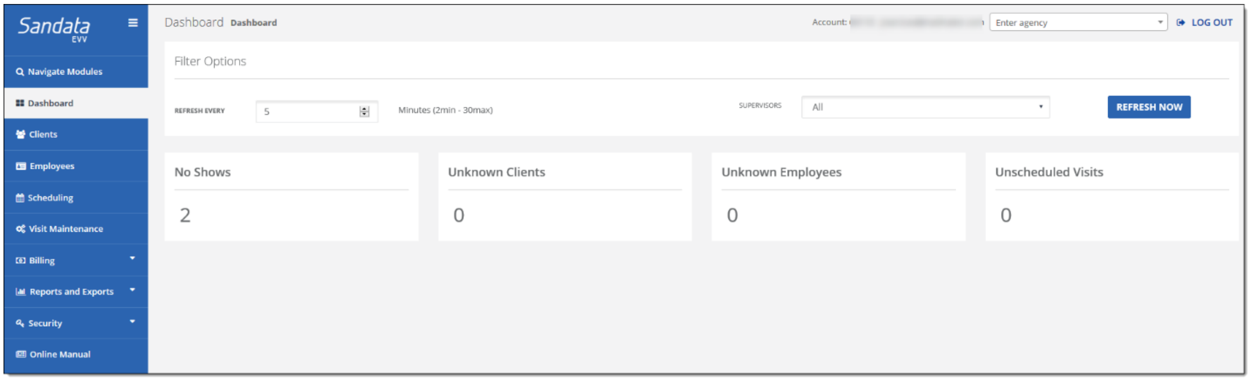
3. Click **RESET PASSWORD**. The system sends an email with a temporary password.
4. Click **Back to Login**. The *Login* screen displays.



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

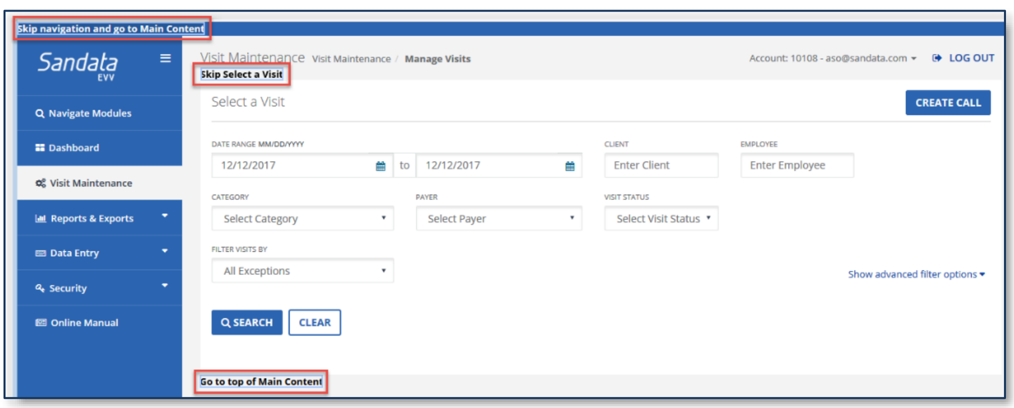
After successful login, the *Dashboard* screen displays.



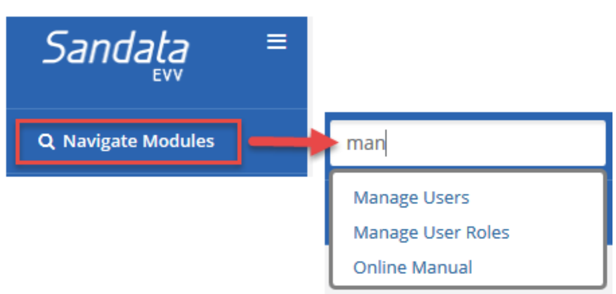
ADA Navigation Support

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.

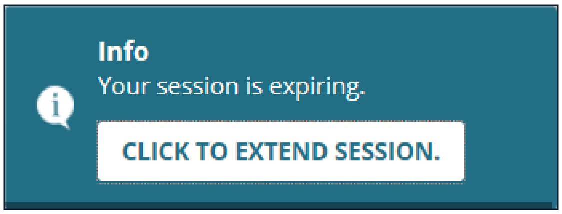
1. Using the <**Tab**> key to move through the system, the links below display individually. They allow you to skip the navigation options and begin with the main content.



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.

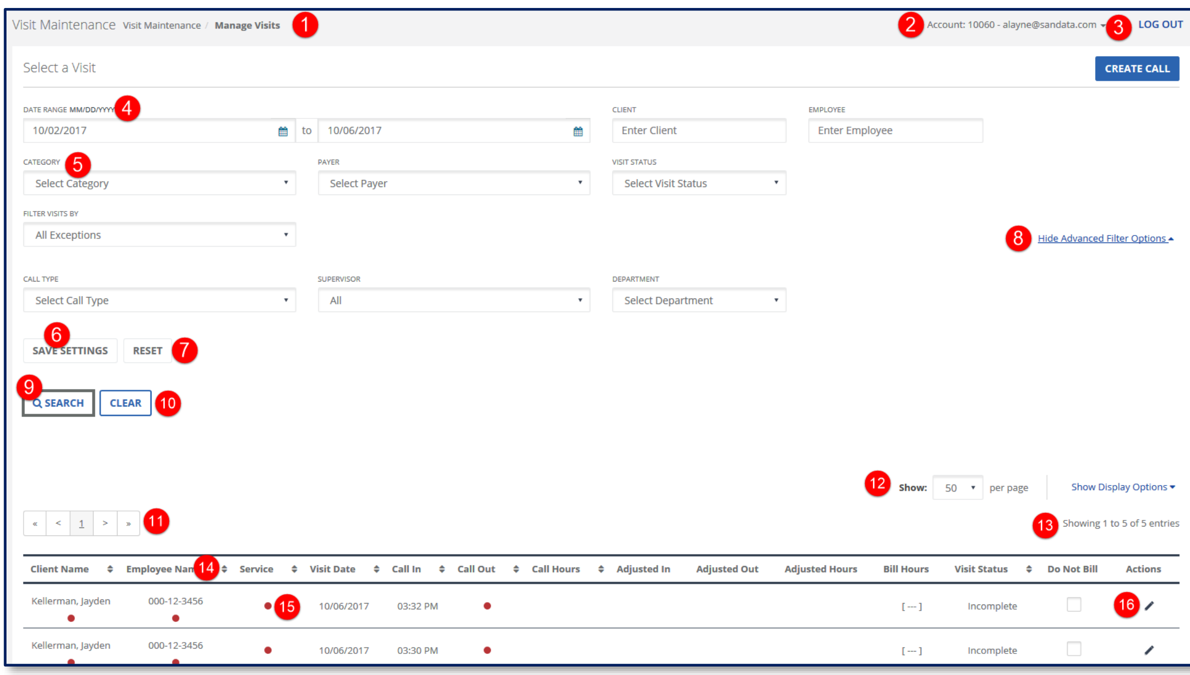


3. To accommodate users that require more time, when a user remains idle for specified period of time, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 (two) minutes, Sandata EVV automatically times out.



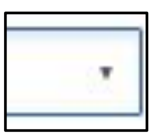
Common Functions of Sandata EVV

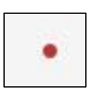
This section describes common functions within Sandata EVV. Here is an example with the different items that are typically displayed.



Common Functions in Sandata EVV

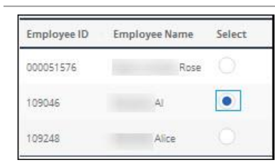
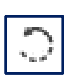
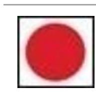
Here is a list of items commonly found in Sandata EVV.

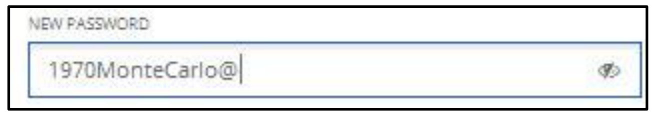
Item		Name	Description
1.		Navigation Path	System and which screen is displayed.
2.		Account and User Display	Displays the account the user is logged into and the username/email address of the user currently logged in. For more about these fields, see the section Sandata Header.
3.		Log Out Button	Logs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

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

Additional Buttons and Icons

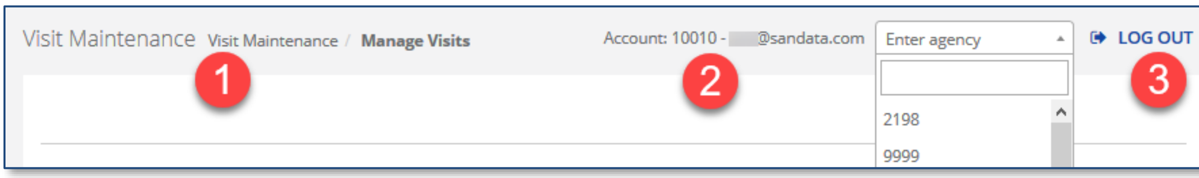
The following buttons are frequently displayed throughout the Sandata system:

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

Button	Function	Description
	Save Button	Located in *Data Entry* 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. 
	Stop recording Button	Pressing this button stops the client voice recording during the SMC call-out process.
	Terminate Button	This button moves either a client record or an employee record to “Terminated” status.

Sandata Header

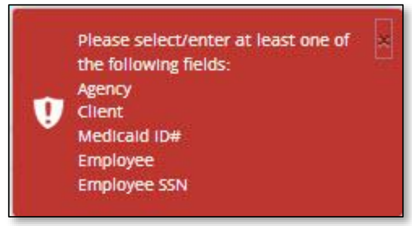
This header is located at the top of every screen in the Sandata EVV. It displays key information about each screen along with functionality to navigate between modules or to log out of the system.



	Function	Description
1.	Navigation Path	This field shows a user the exact location in the system and the current screen.
2.	Account and User Display	Displays the account the user is logged into and the username/email of the user currently logged in. <u>Moving Between Multiple Accounts</u> Click the small arrow pointer in the 'Enter agency' field to display a list of accounts 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
3.	Log Out	Logs the user out of the system and goes back to 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

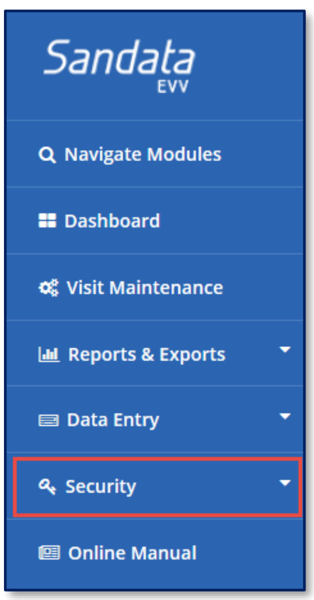
Sandata EVV Security Settings

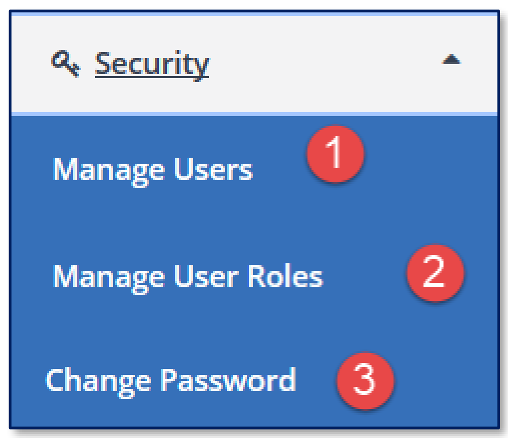
The Security settings in Sandata EVV allow administrators to:

- 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.



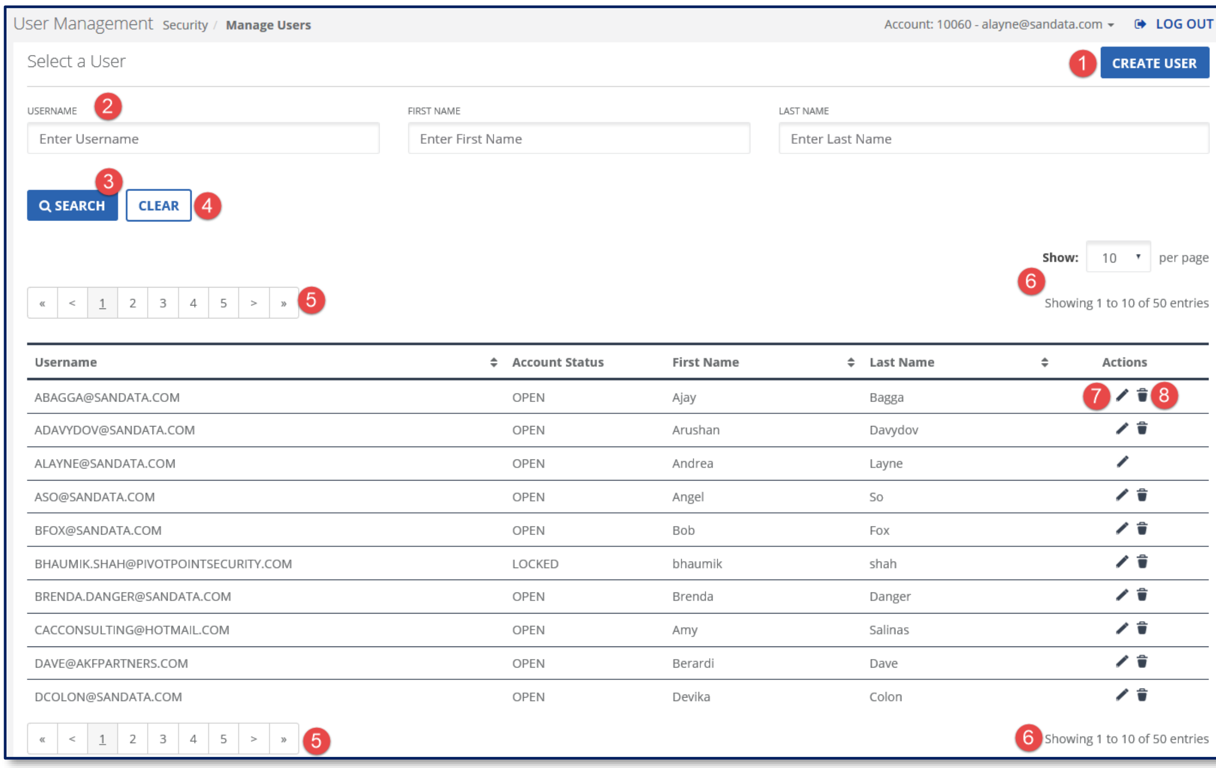


The security settings of Sandata EVV are divided into three sections:

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

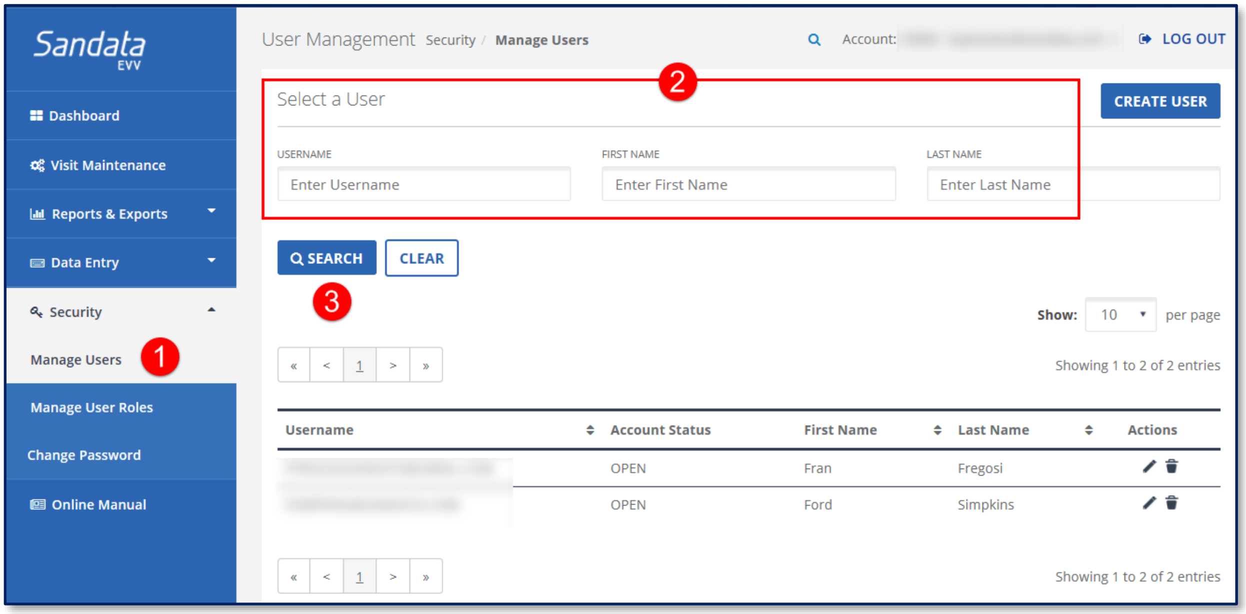
This function includes the ability to search for users who can log in to the Sandata EVV system, view and update a user's assigned permissions within the system, reset a user's password, create new users, lock user accounts and delete user accounts.



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

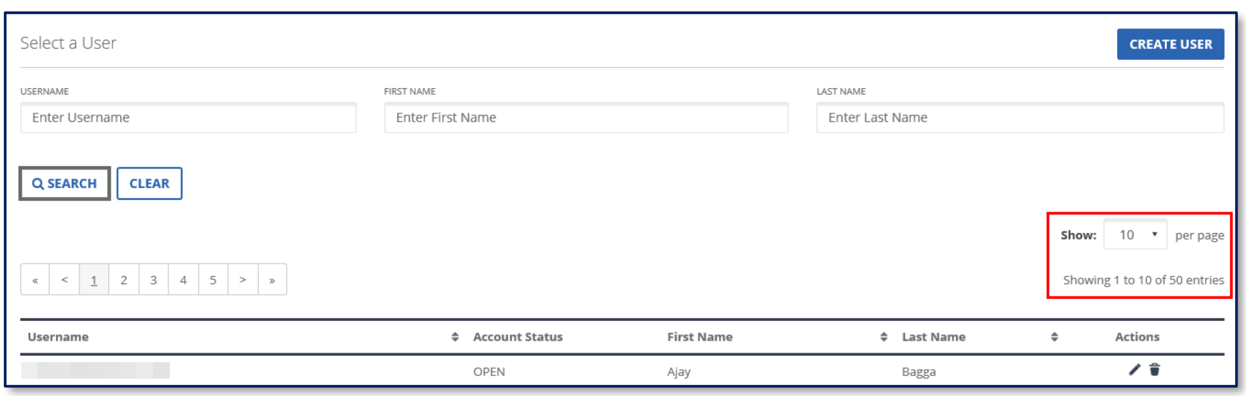
Search for users from the *Manage Users* screen.



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**.

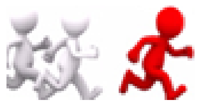


Perform additional searches by clicking **CLEAR** and entering new search criteria.

Creating a New User

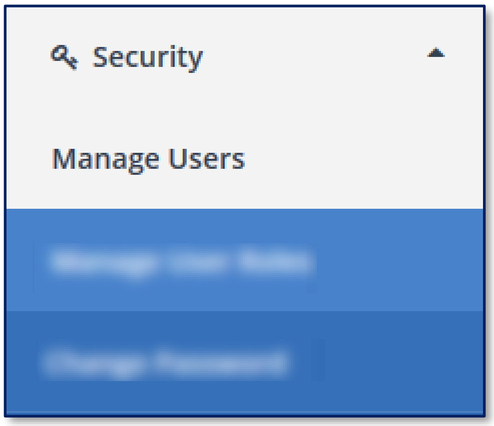
Create User Screen Overview

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



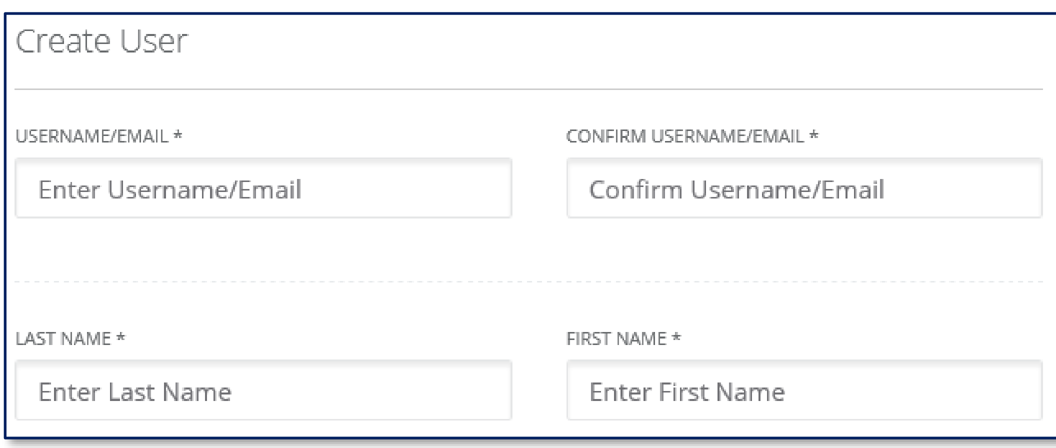
Follow along with the instructor to create a user.

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

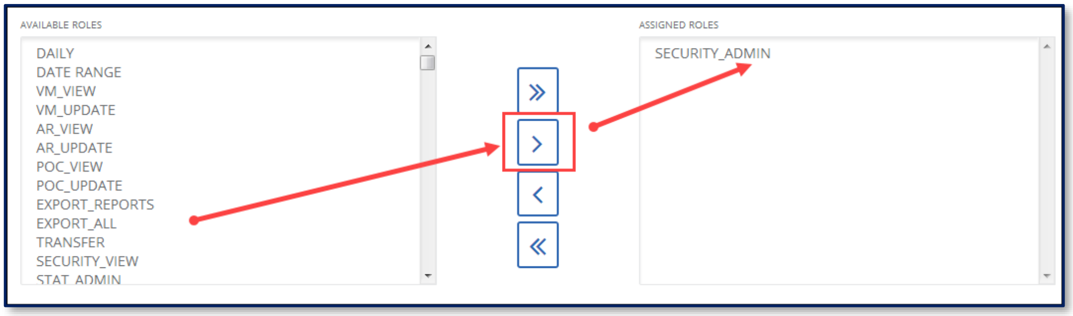


2. Click **CREATE USER.** The *Create User* screen opens.

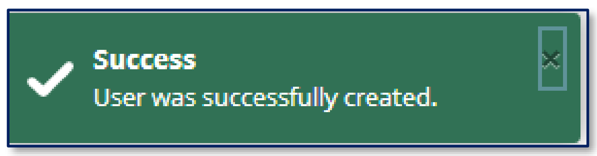
3. Enter/Confirm the user's email address and their **LAST NAME** and **FIRST NAME**.



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.



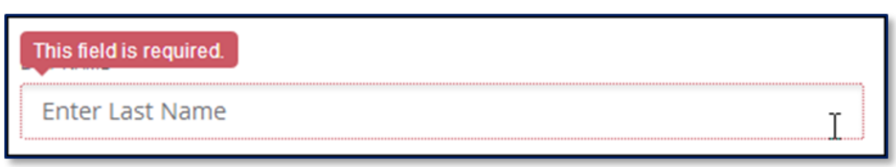
6. Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.
7. Click **CREATE USER**. A successful confirmation message displays.



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

TIP

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 *Available Roles* 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 CREATE USER in upper or lower right corners of the screen. A success screen appears at the top of the screen indicating the user was successfully created.

9.	Open another web browser window and type in the URL: www.mailinator.com 1. 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**. 2. Click on the *Sandata.evv Temporary Password* email displayed. 3. Copy the temporary password and click the Login button. 4. Enter your assigned training agency number 5. Enter the email address for your new user 6. Enter the temporary password you just copied and click **LOGIN** 7. Enter the temporary password in the **OLD PASSWORD*** field (click the "eye" icon to display the password information) 8. Enter a new password and re-enter the password to confirm 9. Click **SAVE** You are now logged in to Sandata EVV under the user new account.

Creating A Second User as A Coordinator	
Task	**Description**
	Click the *Security Module* on the navigation panel and then click the *Manage Users*.
	Click the CREATE USER button in the upper-right corner of the screen to create another user.
	Enter a username (Use the email extension of "@mailinator.com". For example: *jsmith@mailinator.com*). Re-enter the username to confirm.
	Enter a Last Name and a First Name into the appropriate fields.
	Click the **COORDINATOR** role in the *Available Roles* box to highlight the role.
	Click the right pointer > to assign the role the user.
	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.

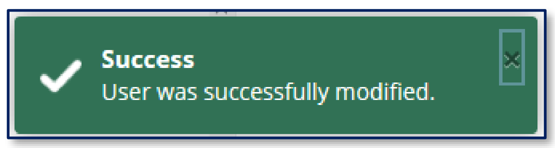
	Open another web browser window and type in the URL: www.mailinator.com 10. Click in the **Check Any Inbox!** field and enter the first part of the email address you created (Using the example in step 3 above, you would enter *jsmith*) for the new user and click **GO**. 11. Click on the *Sandata.evv Temporary Password* email displayed. 12. Copy the temporary password and click the Login button. 13. Enter your assigned training agency number 14. Enter the email address for your new user 15. Enter the temporary password you just copied and click **LOGIN** 16. Enter the temporary password in the **OLD PASSWORD*** field (click the "eye" icon to display the password information) 17. Enter a new password and re-enter the password to confirm 18. Click **SAVE** You are now logged in to Sandata EVV under the user new account.

Modify a User

Follow along with the instructor to modify a user.

Modify User Roles/Privileges

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



Lock/Unlock a User

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

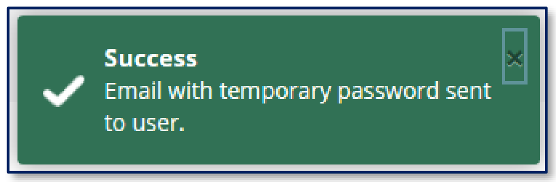
1. Perform a user search.
2. Click **Edit** in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Check/Uncheck the **LOCKED** checkbox, as required.
4. Click **MODIFY USER**. A successful confirmation message displays.

Resetting a User's Password

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

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

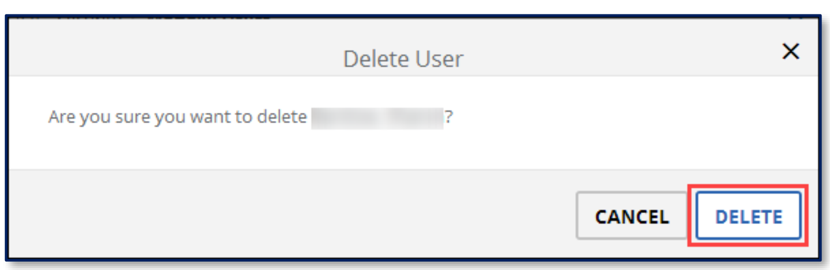
1. Perform a user search.
2. Click **Edit** in the *Actions* column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Click **RESET PASSWORD**. A message displays indicating a temporary password has been sent to the user.



Deleting a User

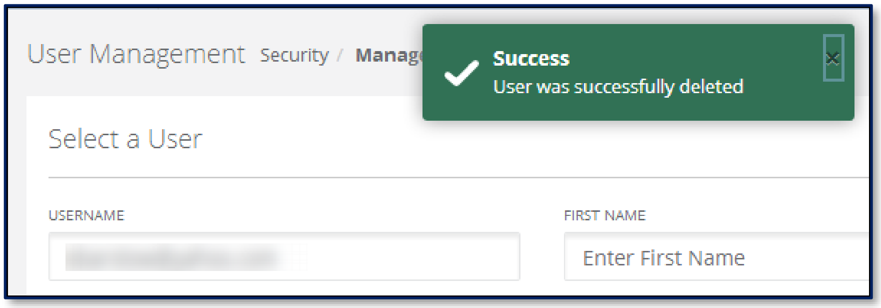
Follow along with the instructor to delete a user.

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



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

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



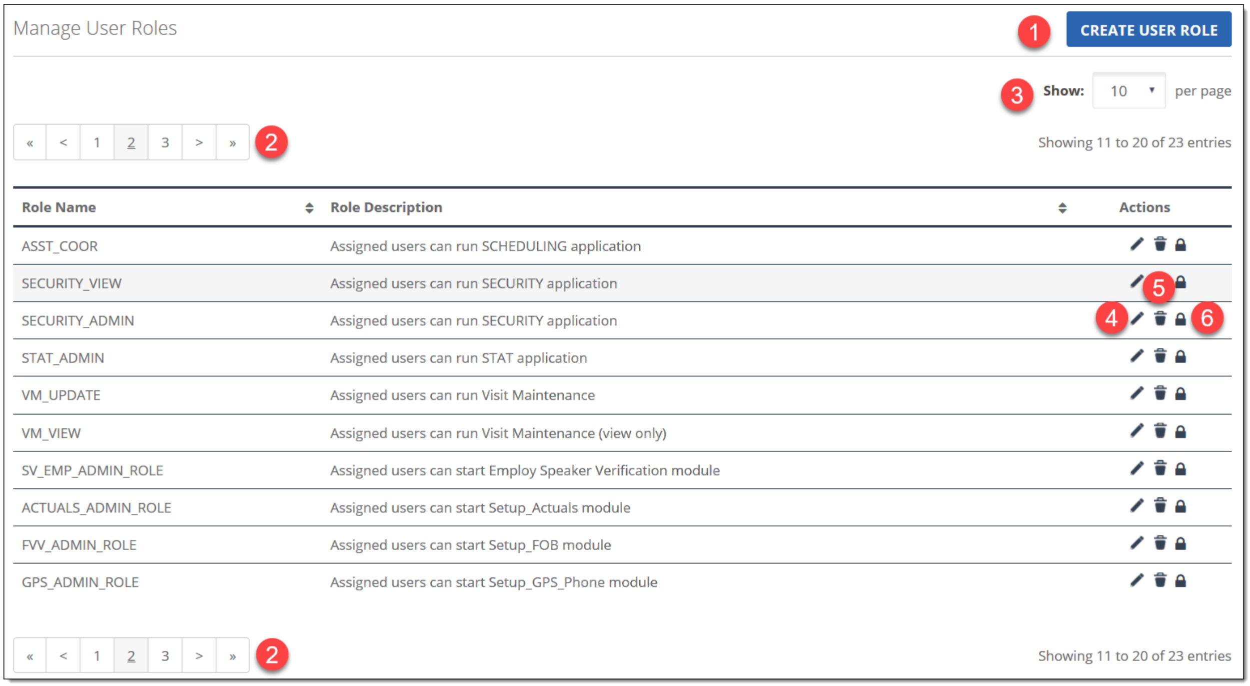
Manage User Roles

The use of roles allows administrators to define a set of system functions for each job title in the agency 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.

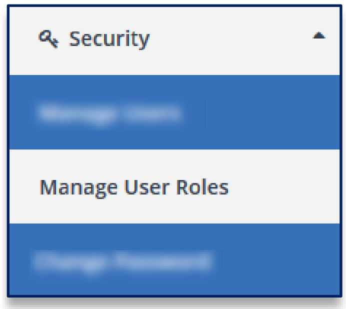
Screen Overview



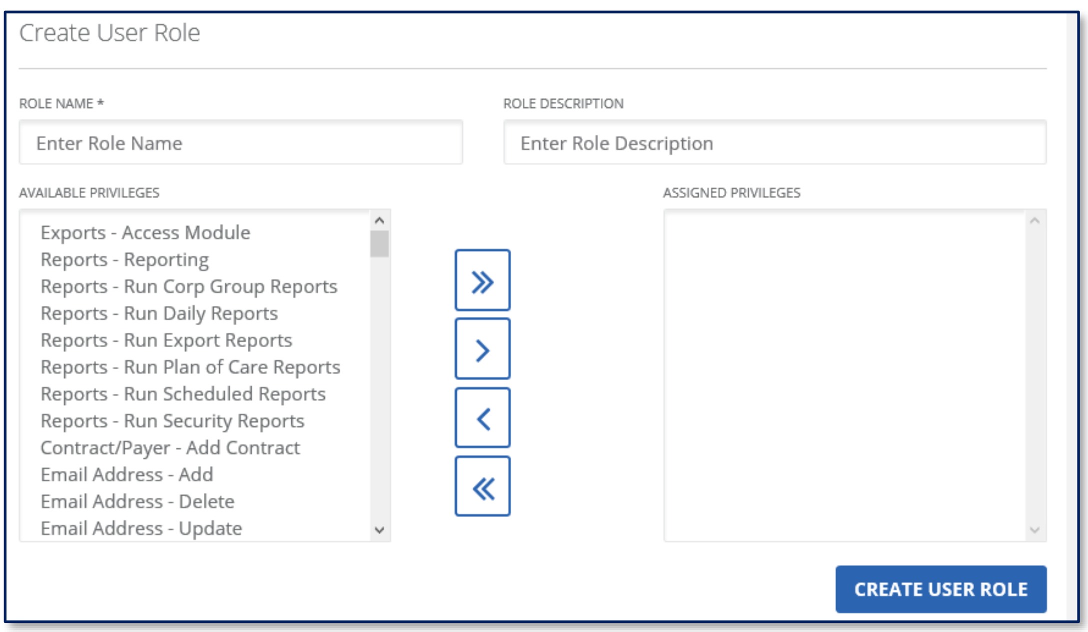
1. **Create User Role** – Used to create a new user role.
2. **Page Navigation** – Dependent upon the number of results, there can be 1 or multiple pages.
3. **Show** – Allows for input of how many entries are shown per page and displays the total number of results returned.
4. **Edit** – Edit a user.
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

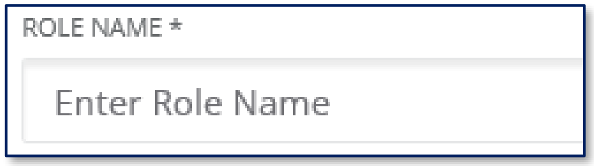
1. Click **Manage User Roles**. The *Manage User Roles* screen displays.



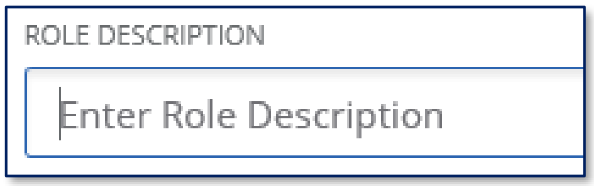
2. Click **CREATE USER ROLE**. The Create User Role screen opens.



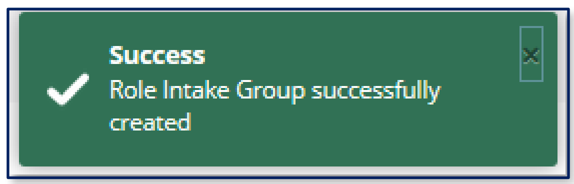
3. Enter a name for the new role in the **ROLE NAME*** field.



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



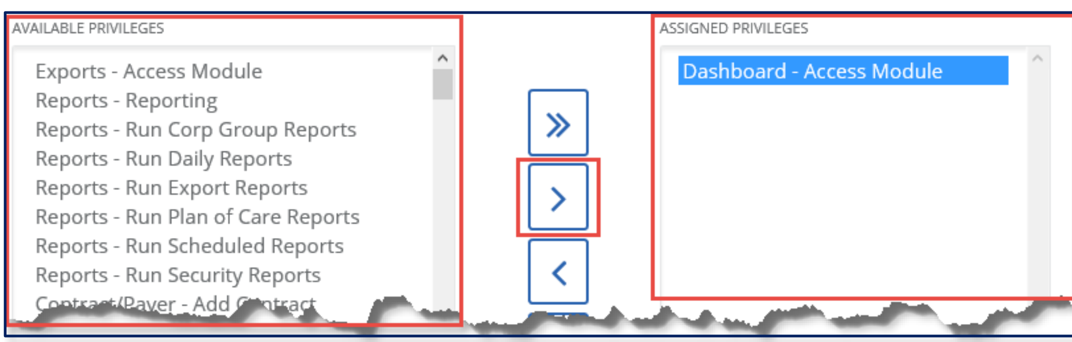
5. Click **CREATE USER ROLE**. A successful confirmation message displays.



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.

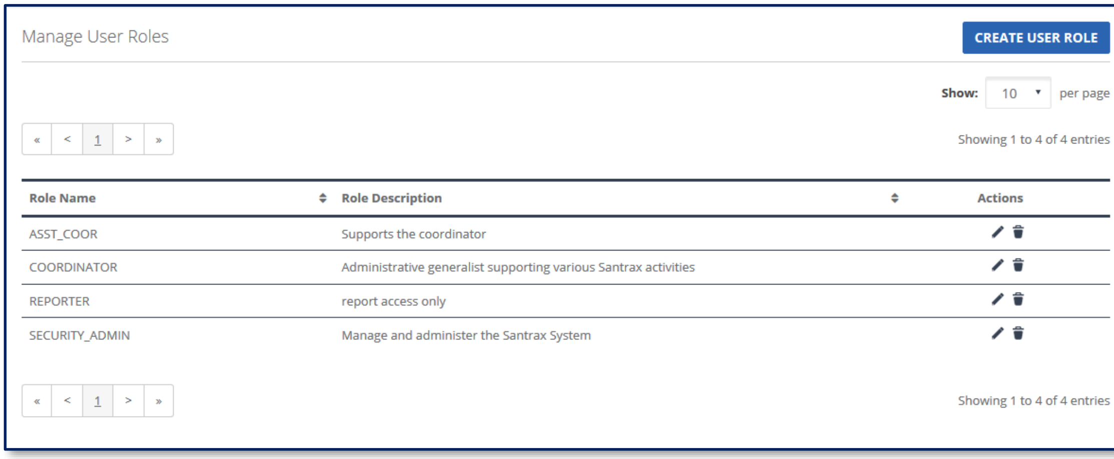


9. Click **MODIFY USER ROLE** to save the assigned privileges.

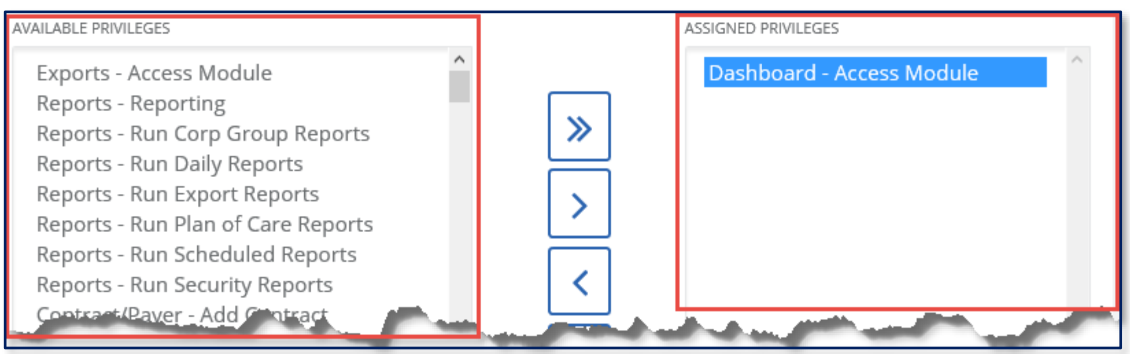
Modifying Roles

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.



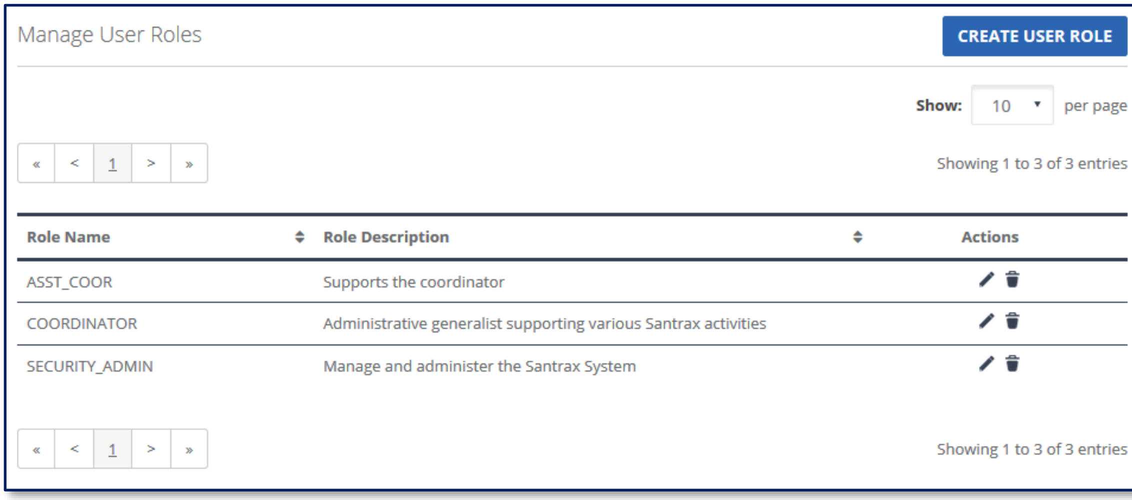
2. Click **Edit** in the **Actions** column on the right-hand side of the screen of the role to be modified. The *Modify User Role* screen opens.
3. Add (**AVAILABLE PRIVILEGES**) or remove (**ASSIGNED PRIVILEGES**), as necessary.



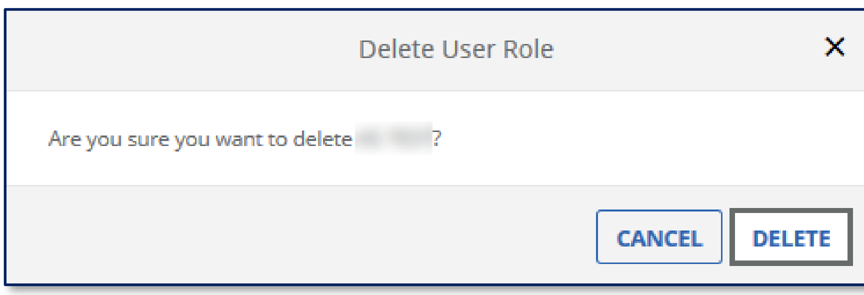
4. Click **MODIFY USER ROLE**. If successful, a confirmation message displays.

Deleting Roles

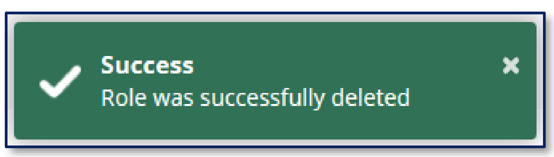
1. Scroll through the list of roles and find the role to be deleted.



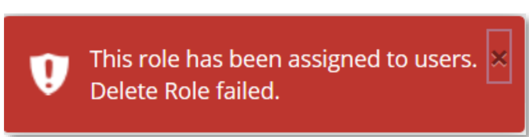
2. Click **DELETE** in the **Actions** column on the right-hand side of the screen of the appropriate role. The *Delete User Role* confirmation box displays.



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



A Role cannot be deleted if it assigned to a user. The following message display's when trying to delete the role.

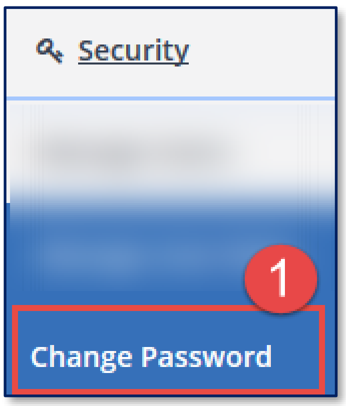


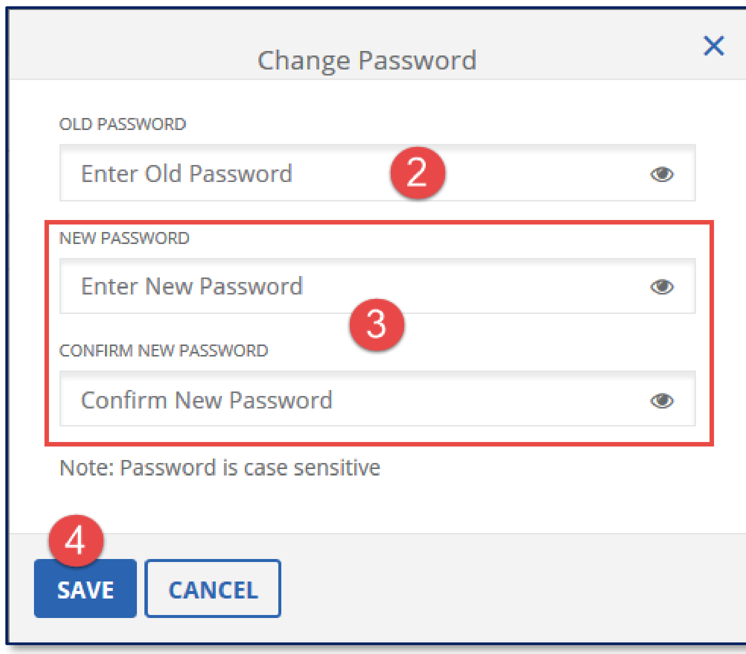
Change Password

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**.

4 Client Module

Module Time

30 minutes

This lesson introduces the process of how clients 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.

**Note* – *Functionality may not apply based on program configuration and requirements.*

Key Terminology

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

Introduction

The Clients module allows system users to maintain client records.

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

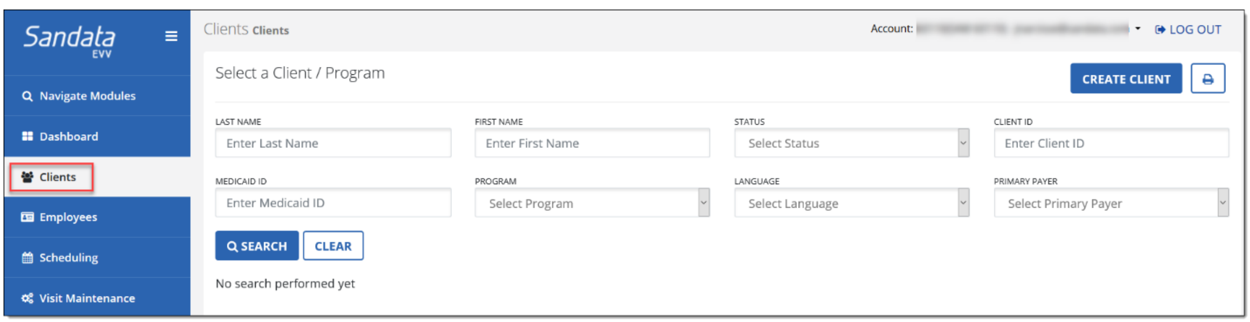
Accessing Clients

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.

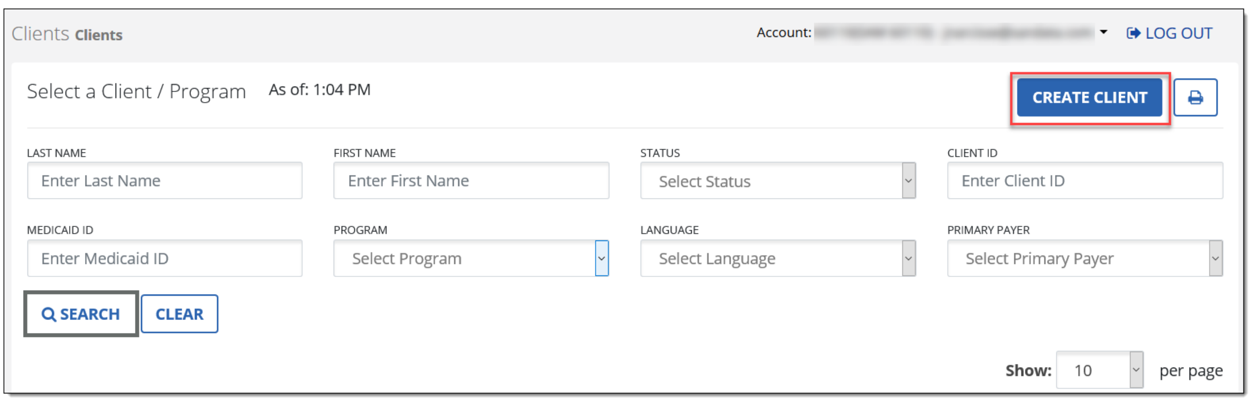
Create New Client(s)

*****_**Note**: Create New Client functionality only applies to Fee for Service_

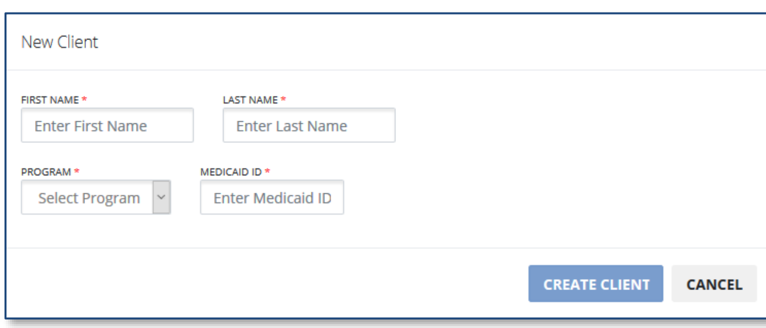
The first name, last name, program and Medicaid ID are the required fields to create a client record. Once created, any known addresses at which the client can routinely receive services and phone numbers used by the client, are also required fields. Enter the information into the Create New Client screen. 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

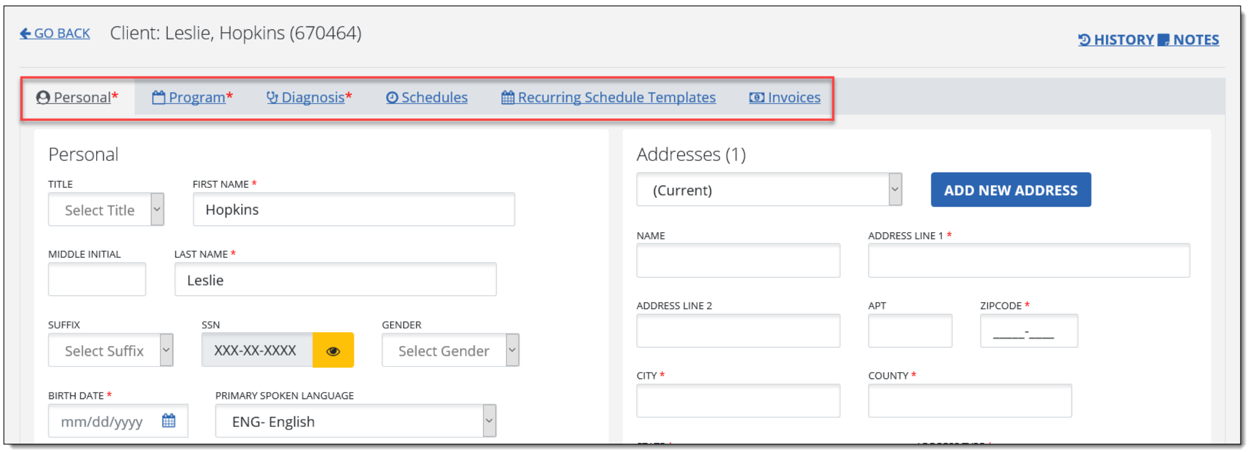
1. Click **CREATE NEW CLIENT. The Create Client** screen opens.



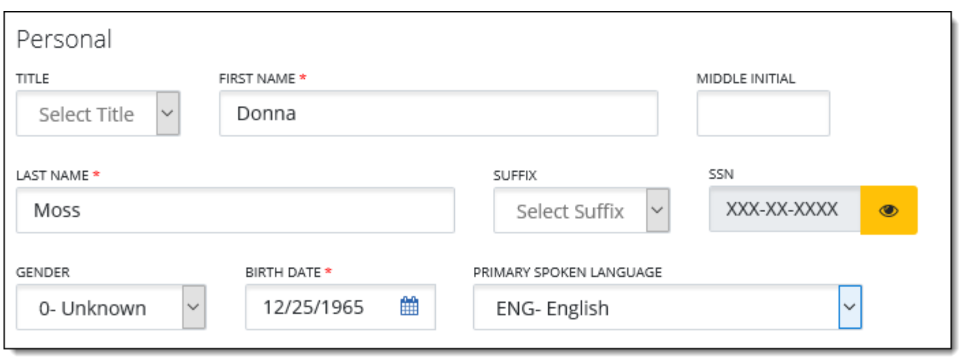
2. Enter the required fields: FIRST NAME, LAST NAME, PROGRAM, MEDICAID ID and click **CREATE CLIENT.**



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.



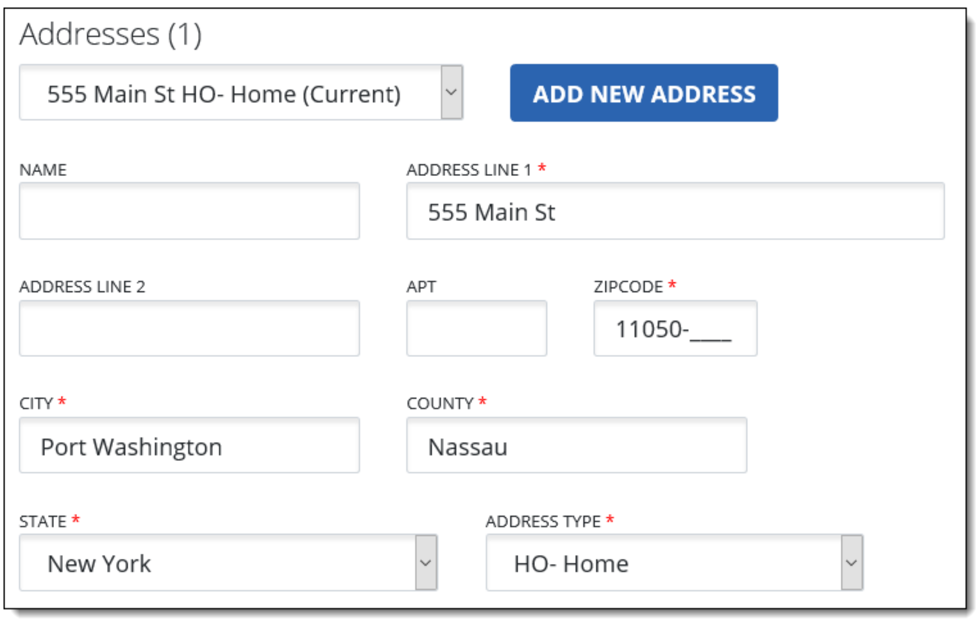
Personal



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.

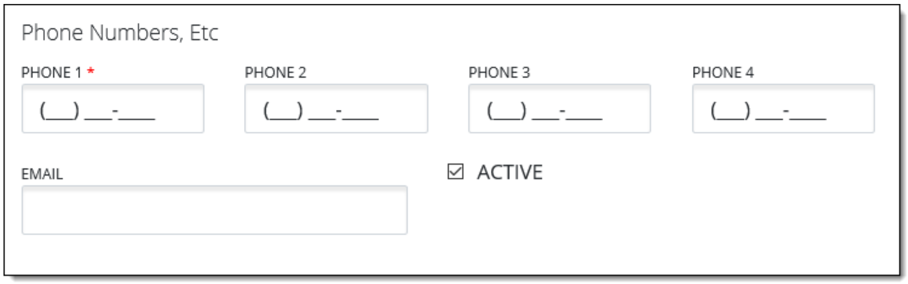
During the telephony call process, you will be prompted to enter a client ID to identify the client. This number can be found within the client record next to the client's name in parenthesis.

Address



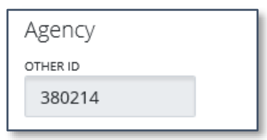
NAME: Provide an identifier for your address (example: Daughter's house, Sister's, etc.) (required).
ADDRESS LINE 1*: Type the street address (required).
ADDRESS LINE 2: Enter if additional space is needed.
APT: Type an apartment number if needed.
ZIP CODE*: Type in the address zip code (this automatically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

Phone Numbers, etc.



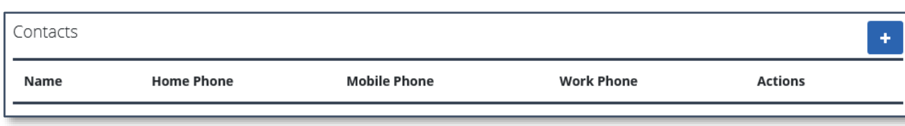
1. **HOME:** Type the telephone number.
2. **MOBILE:** Type the telephone number.
3. **WORK:** Type the telephone number.
4. **FAX:** Type the telephone number.
5. **EMAIL:** Type the email address.
6. **Active:** Uncheck if the address is no longer valid.

Agency

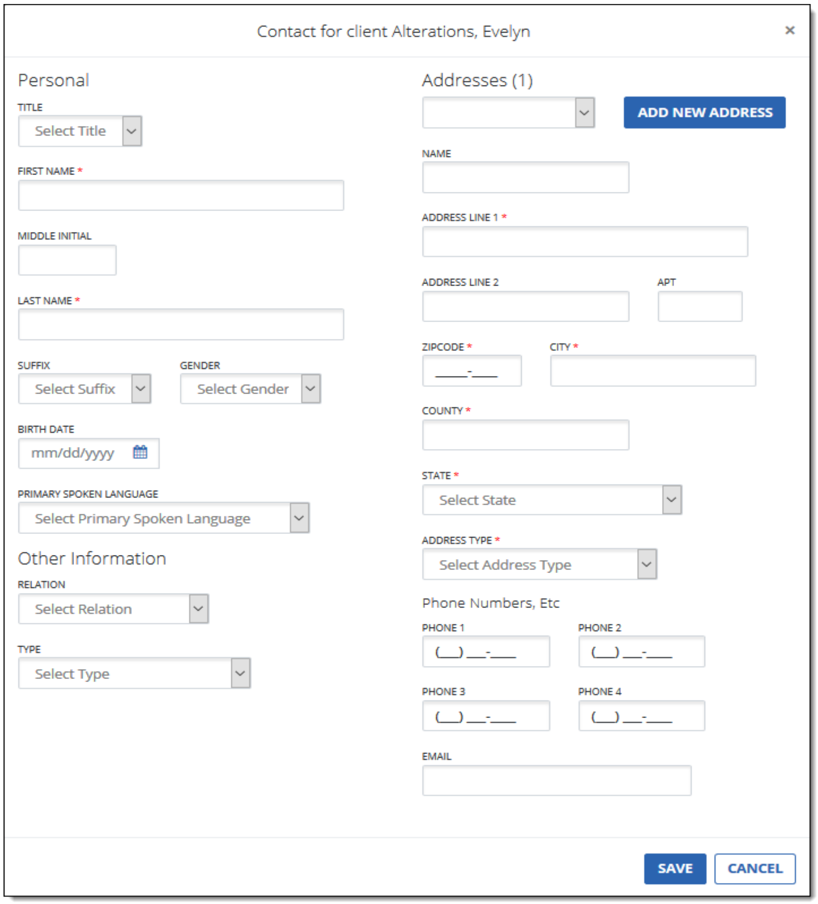


1. **OTHER ID:** Unique system assigned ID number.

Contacts

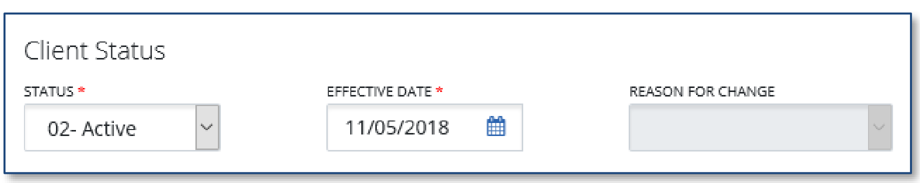


2. Click the plus (+) sign to add a contact.
   i. **FIRST NAME, LAST NAME, ADDRESS NAME, ADDRESS LINE 1, ZIP CODE, CITY, COUNTY** and **STATE** are required.
3. Repeat the above step to add additional contacts for the client



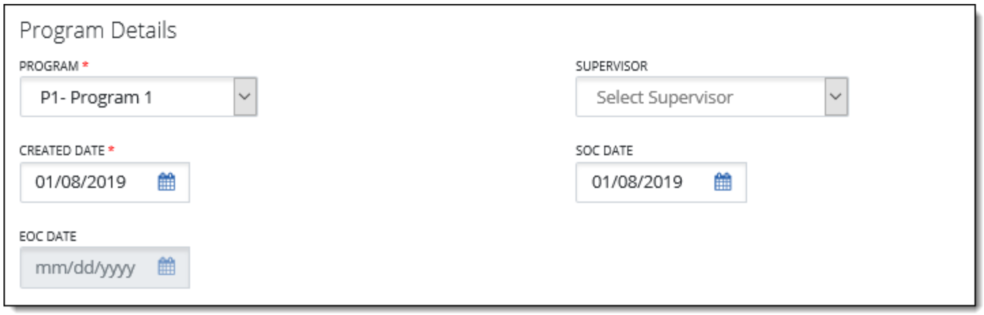
Program

Client Status



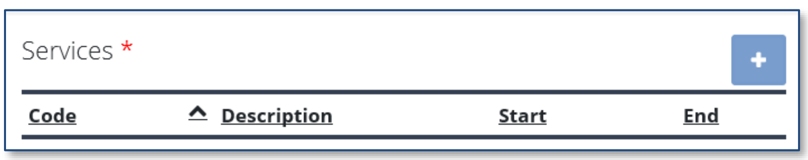
4. **STATUS:** New clients are *Pending* by default. Set status to *Active*.
5. **EFFECTIVE DATE:** Defaults to date the client record is created.
6. **REASON FOR CHANGE:** N/A.

Program Details

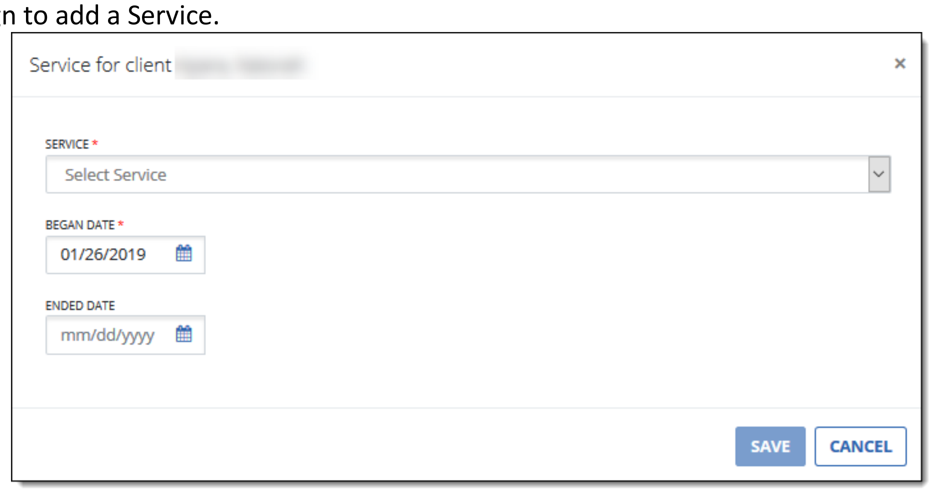


- **PROGRAM*:** Populated when creating the client (required). Select from drop-down list to change.
- **SUPERVISOR:** Select from the drop-down. Used to group clients to supervising office staff.
- **CREATED DATE*:** Defaults to date the client record is added in the system (required). Click into the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

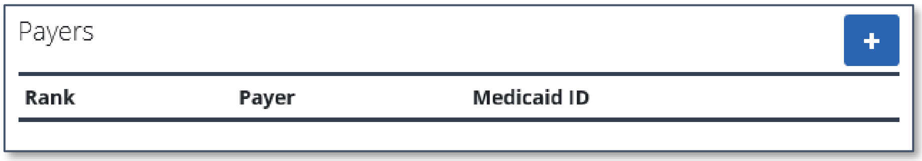


- **SERVICE*:** Select a Service from the drop-down
- **BEGIN DATE*:** Type into the field (including slashes) or click on calendar icon to select (required)
- **END DATE:** Type into the field (including slashes) or click on calendar icon to select

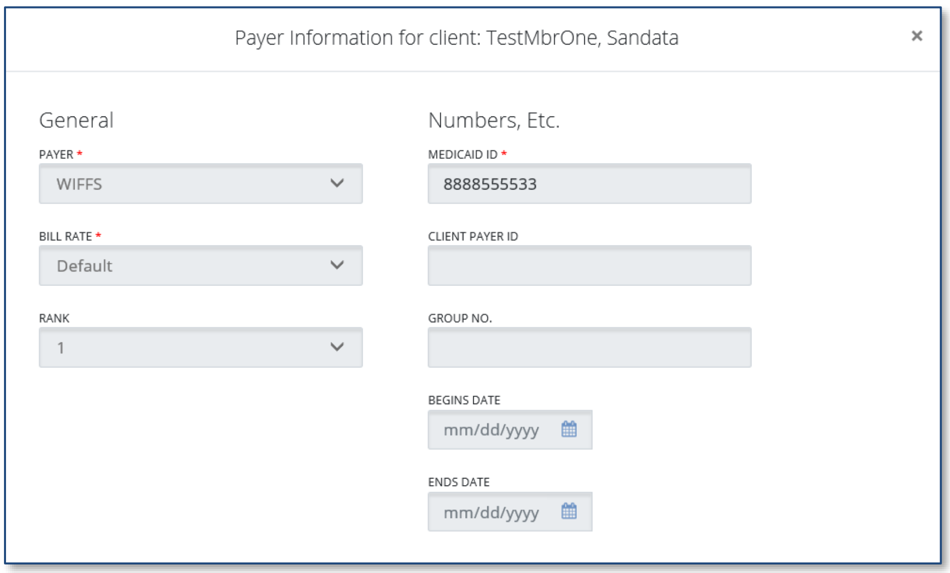
Click **SAVE** to save the Service information. Repeat the steps above to add additional services.

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.



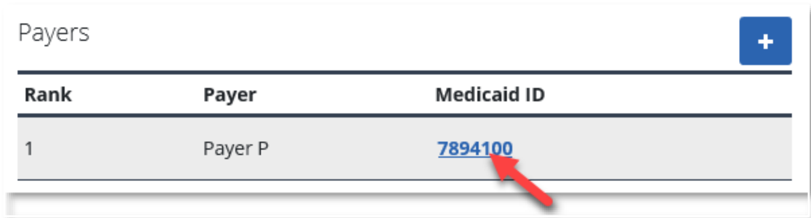
Click the (+) sign to add a Payer. Enter the necessary information.



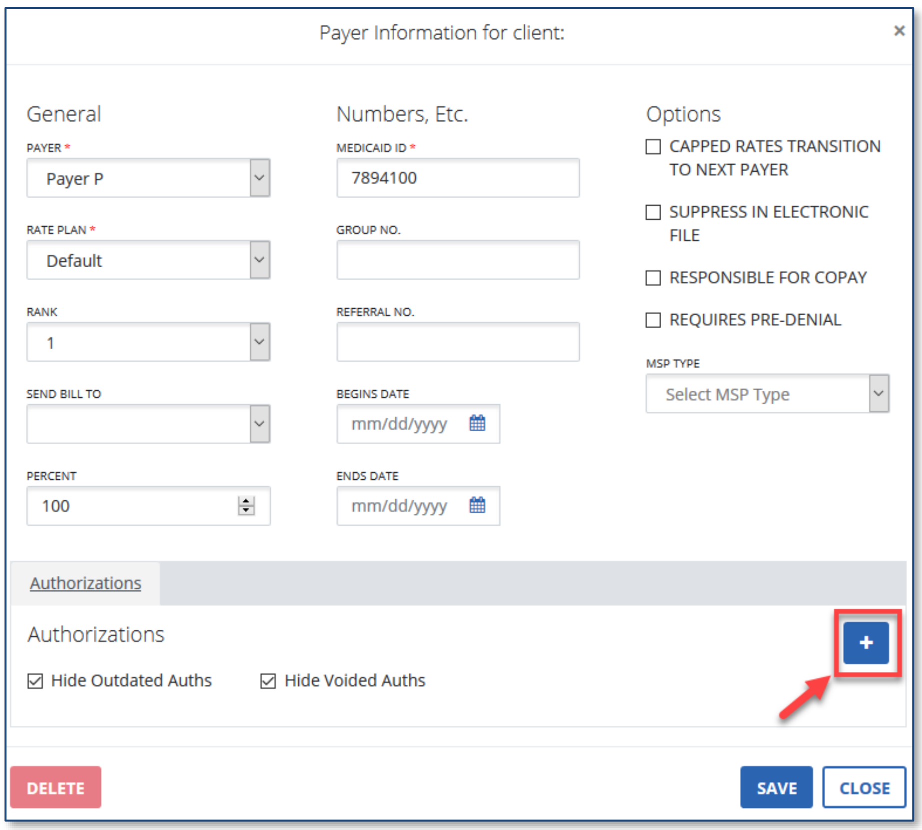
- **PAYER*:** Select a Payer name from the drop-down list
- **BILL RATE*:** Select a Rate Plan that is assocated to the Payer selected
- **RANK:** The rank will automatically be set in the order that the client payers are entered. The first payer added is rank 1 and the second payer added is rank 2.
- **MEDICAID ID*:** Enter the unique ID number assigned to the client by Medicaid
- **CLIENT PAYER ID:** Enter the unique ID number assigned by the payer.
- **GROUP 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.

Authorizations

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



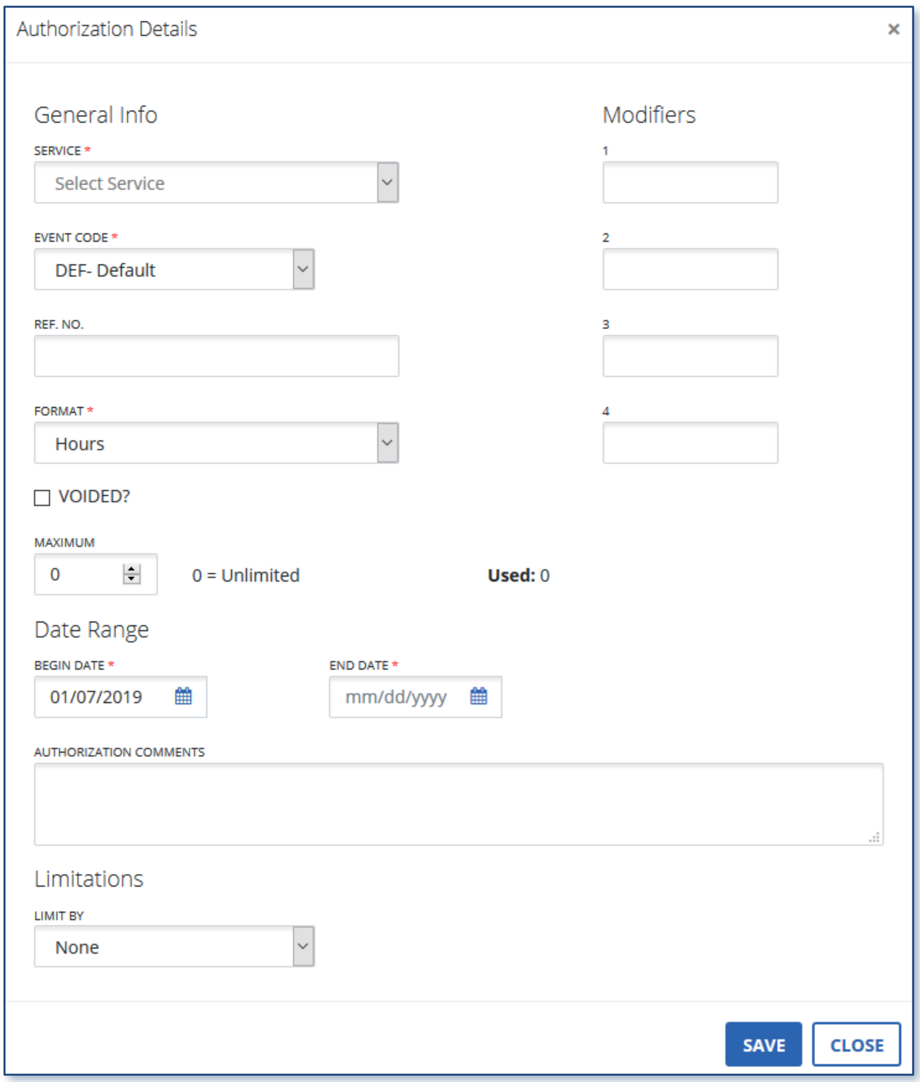
- Click the (+) sign within the Authorizations panel to add an authorization. (Note: adding authorizations is disabled if authorization data is sent to Sandata EVV using a data feed)



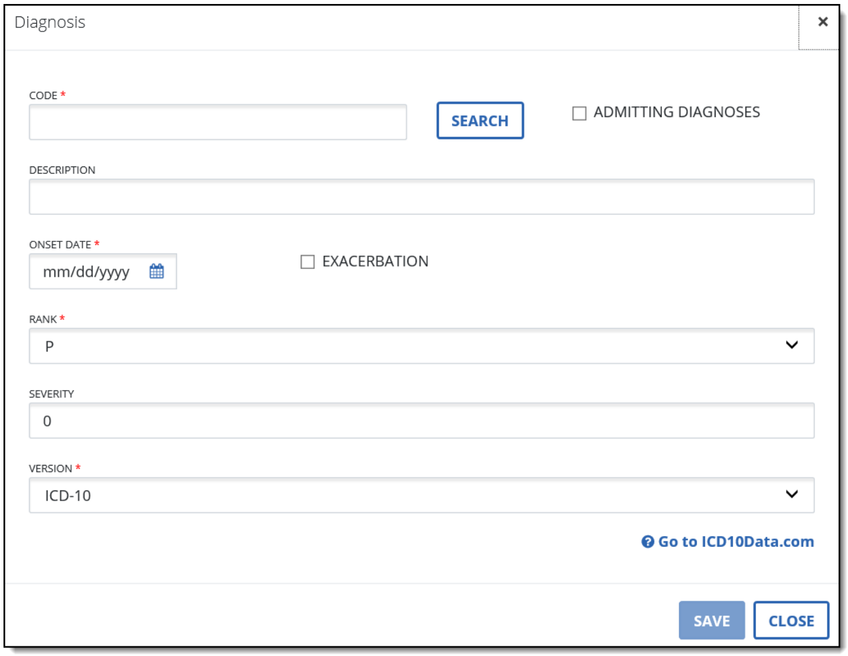
- Complete the necessary fields.
  - **SERVICE***: Select the service the authorization is associated with from the drop-down list.
  - **EVENT CODE***: The value defaults to DEF Default.
  - **FORMAT***: Select the appropriate format from the drop-down list.
  - **VOIDED?:** Select this checkbox if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

- Click **SAVE** when done.

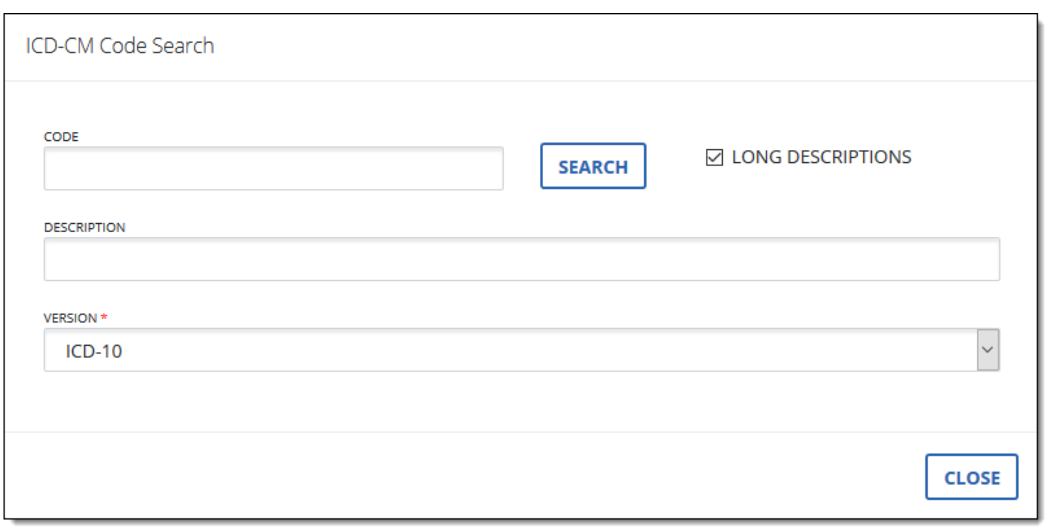


Click the (+) sign to add a Diagnosis.



- 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.

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

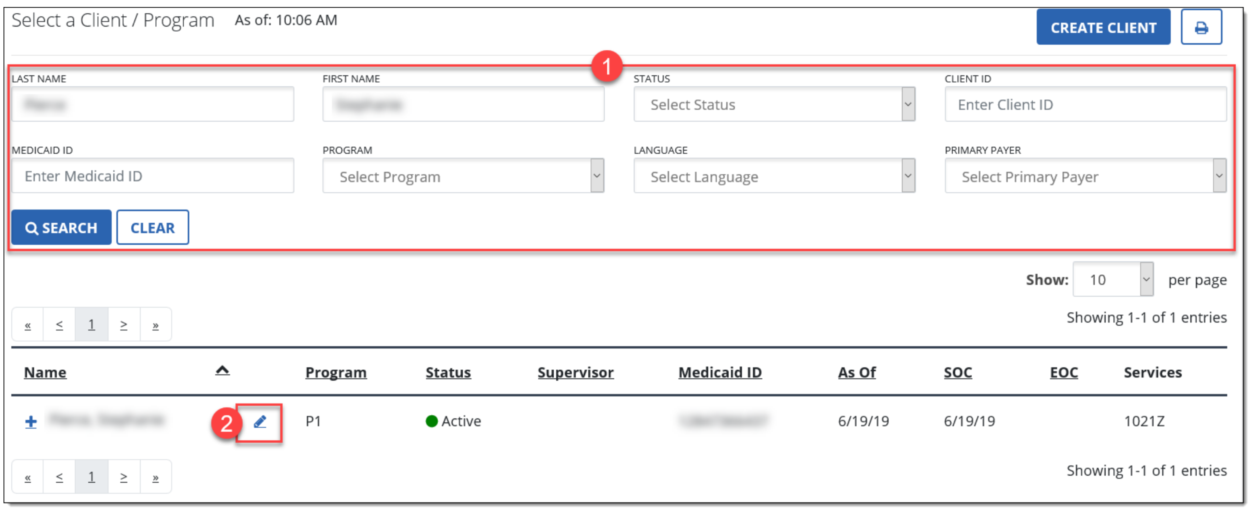


Modifying Client Data

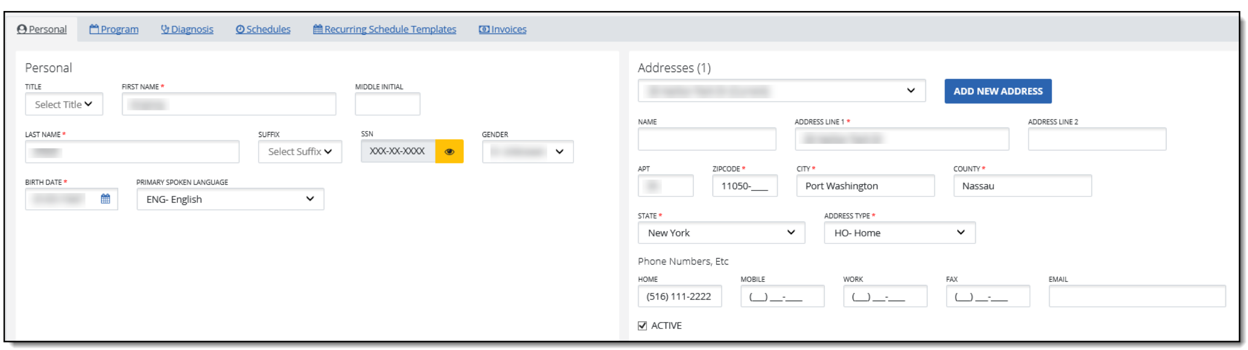
Modifying a client's data will allow you to update their information as necessary.

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.

- Search for the Client
- Click the **EDIT** icon



- Make all necessary updates to the client data



- SAVE & CLOSE

5 Employee Module

Module Time

10 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.

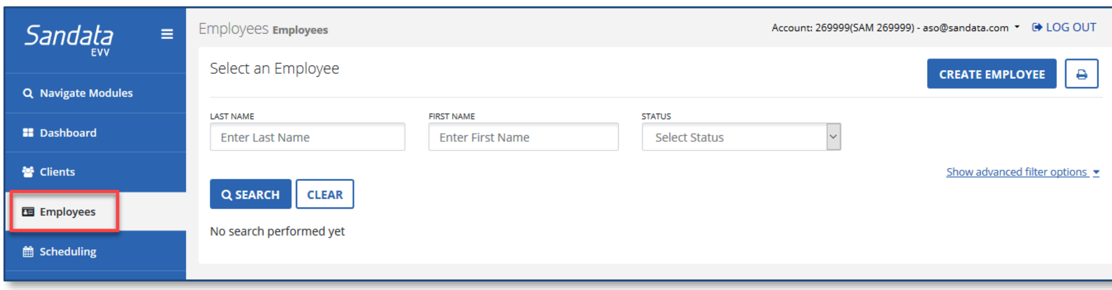
Note *– Functionality may not apply based on program configuration and requirements.*

Employee Data

The Employee module allows system users to maintain employee records.

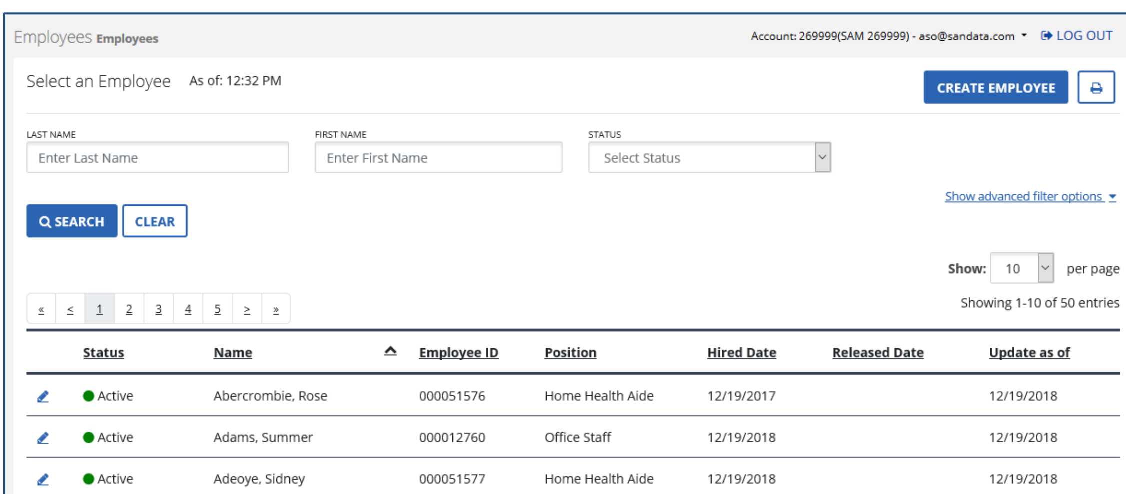
Take note that 'Employee' is the term used in the EVV system. This can translate to however the person for who is providing care is termed for the program.

Search for an Employee



Demonstration: Search for an Employee

1. Click **Employees** from the **Navigation** panel. The Search screen displays.
2. Enter the values either in **LAST NAME**, **FIRST NAME** or **STATUS** field.
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.
4. Click the pencil icon on any results line to view the employee details.



6 EVV-SMC/TVV/FVV

Module Time

60 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 of using the client's telephone or phone associated with the client;
- describe the Fixed Visit Verification (FVV) option, used when a client does not have a phone, does not allow the use of their phone and the caregiver cannot use SMC
- explain the different Call Reference Guides (CRG) available for use.

Key Terminology

Term/Acronym	Definition
Fixed Visit Verification (FVV)	Sandata's alternate call process for a client when mobile and telephone are not available
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

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 caregiver 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
- Check the **MOBILE User** checkbox in the *Agency* section

***Note**: Additional fields may be required based on program requirements.*

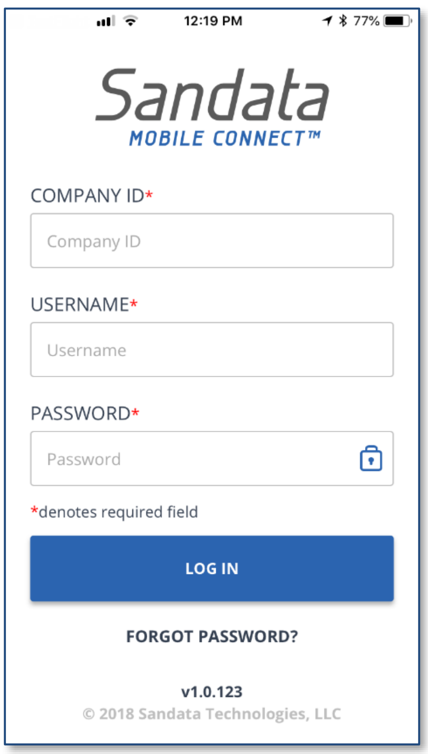
When these values are captured and the employee record is saved, Sandata EVV generates a temporary SMC password and emails it to the employee at the email address entered.

Initial Set-up

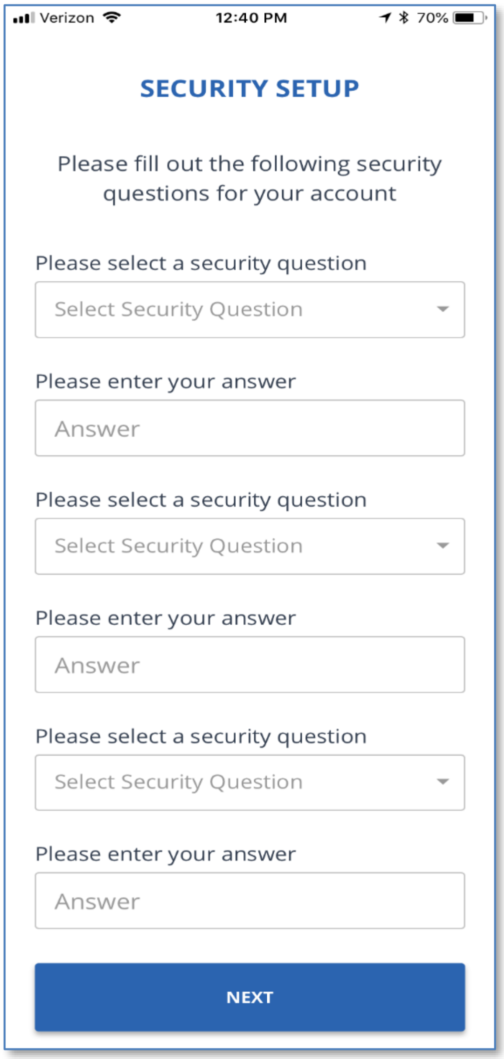
When the employee logs in to SMC for the first time, he or she will need to enter the following data elements:

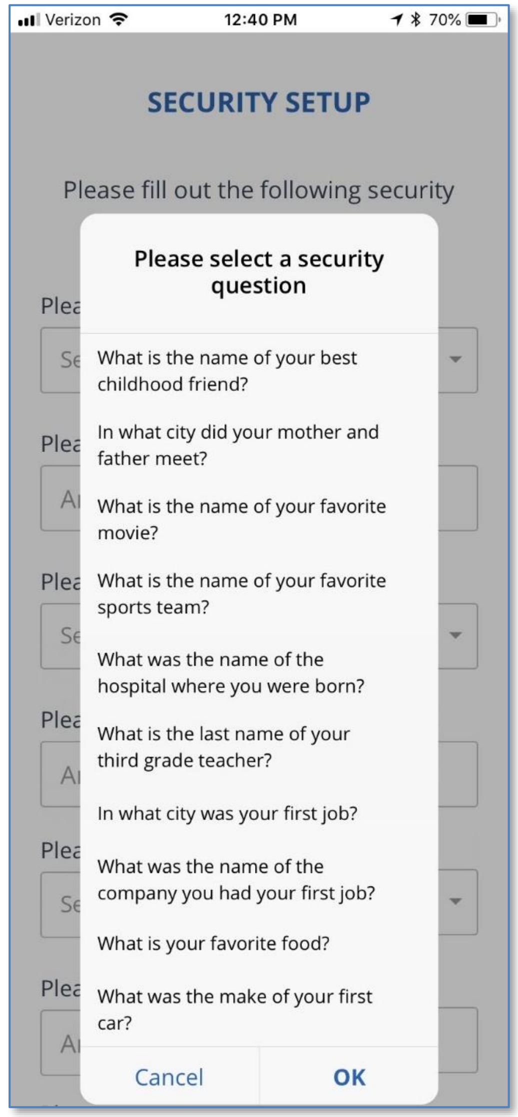
- **Company ID:** *2-Sandata account #* (always the number 2 plus a dash and the agency provider's assigned Sandata account #)
- **Username:** employee's email address
- **Password:** the temporary password emailed to the employee's email address entered when creating the employee

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



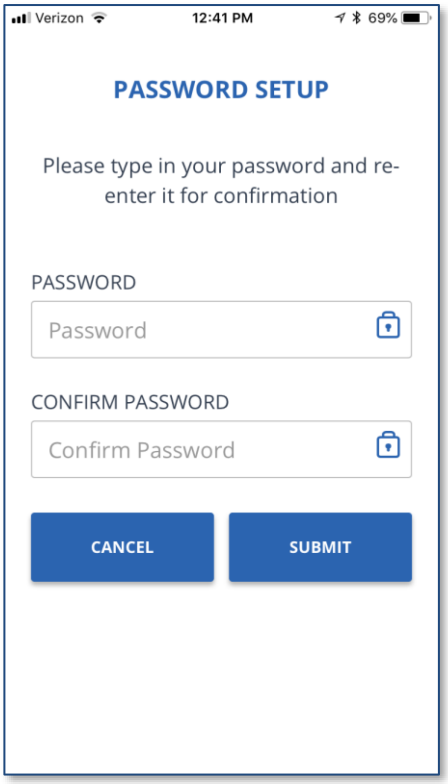
Upon logging in to SMC for the first time, the employee is asked to select and define answers to a set of security questions. The security questions are:





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**.

TIP

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. @#$%^).

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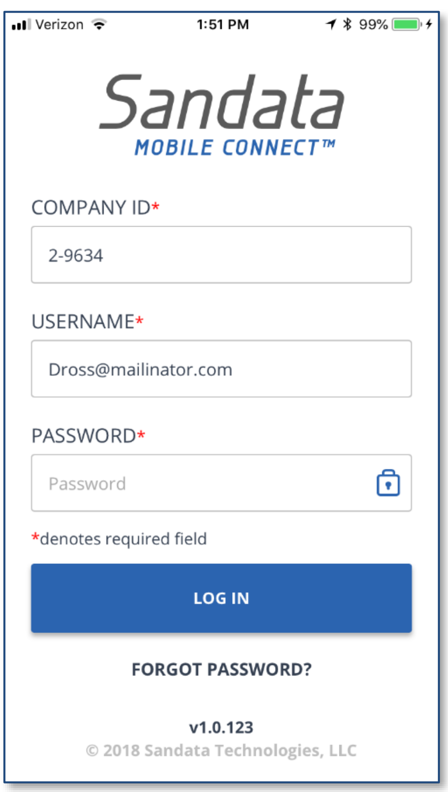
2. **Confirm Password**.
3. Click **SUBMIT** after entering the new password.

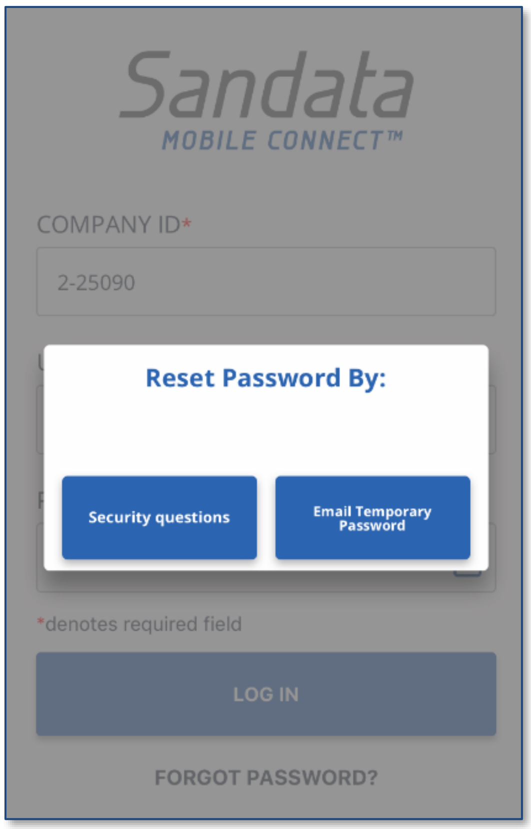


The Login screen displays. The employee uses the new password at the next login.

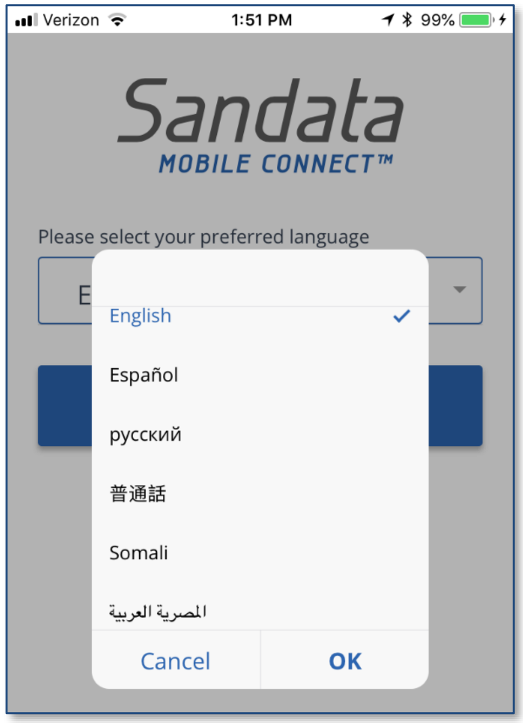
Resetting a Forgotten Password

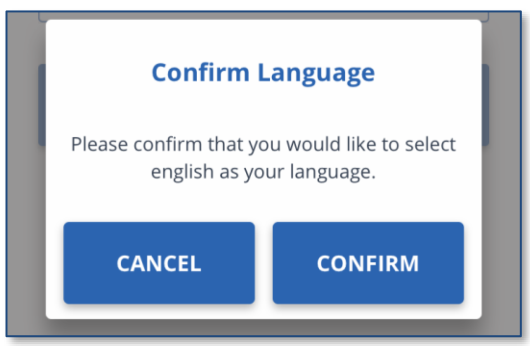
If an employee forgets their password, they can simply tap the **FORGOT PASSWORD?** link on the login screen. The employee is prompted to choose which method they wish to use to reset their password.

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



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.



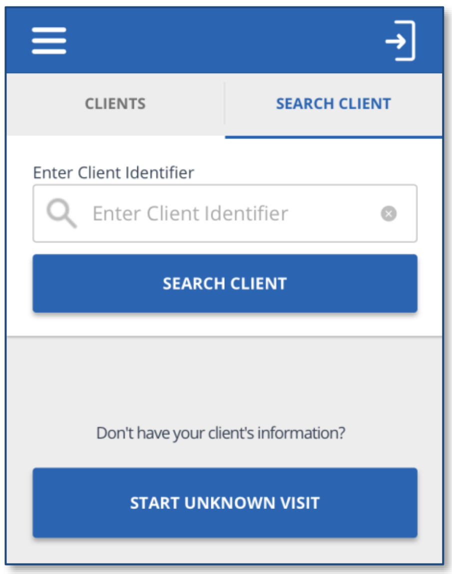


After confirming the language preference on the device, the *Home* screen displays.

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

Navigating the Home screen

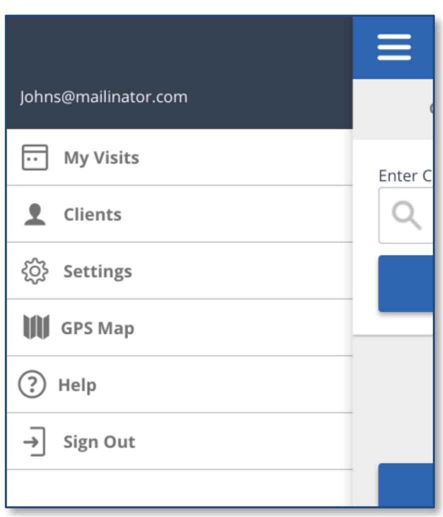
Upon successfully logging in to SMC, the user is presented with the *Home* screen. From this screen, the user is able to:



- **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 a 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.

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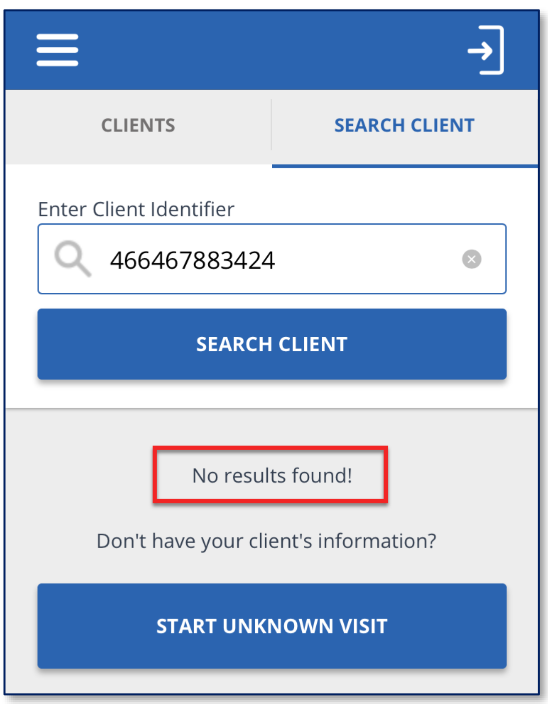
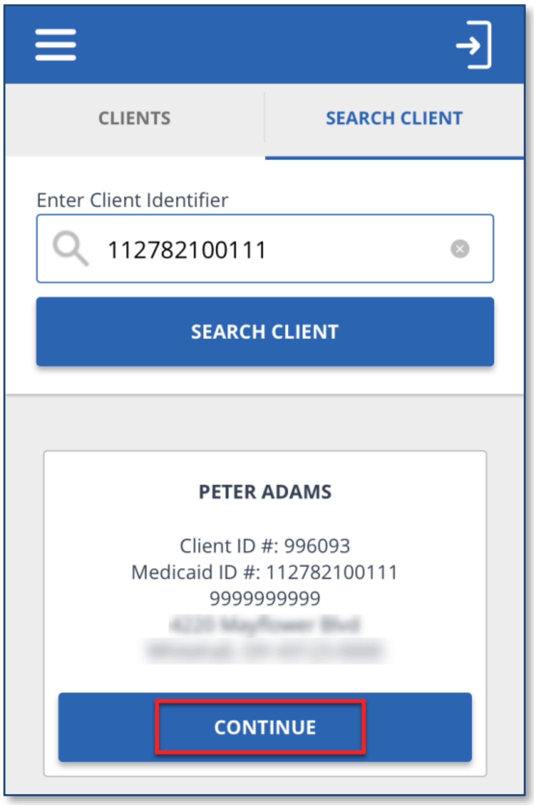
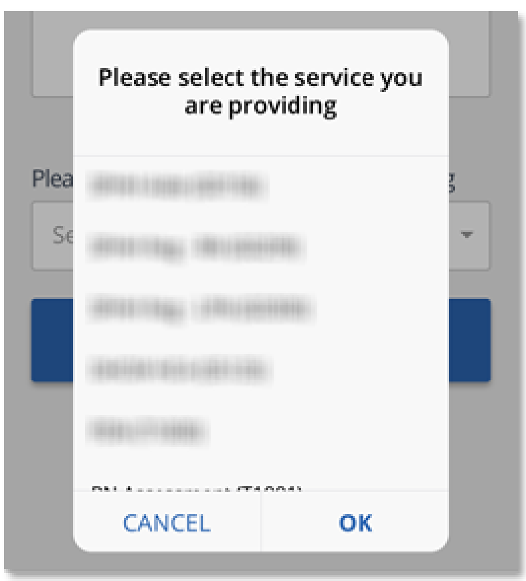
3. Tap the **SEARCH CLIENT** button. (If ID entered does not match to any client, a "no results found" message displays).



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

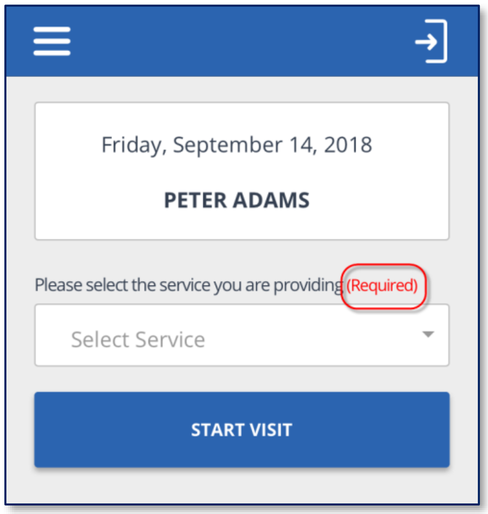


5. Select the *Service* from the drop-down list

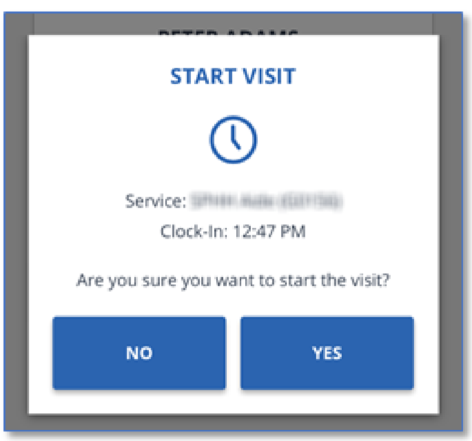


Service Selection Note

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.

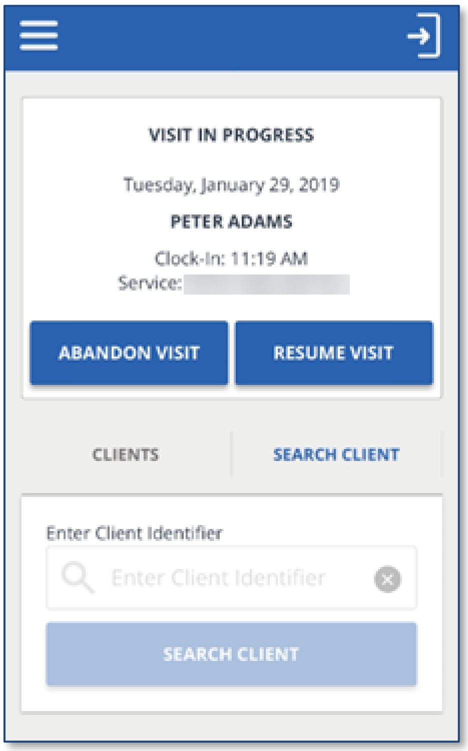


7. Log out of SMC and proceed with providing care.

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

Completing a Visit

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

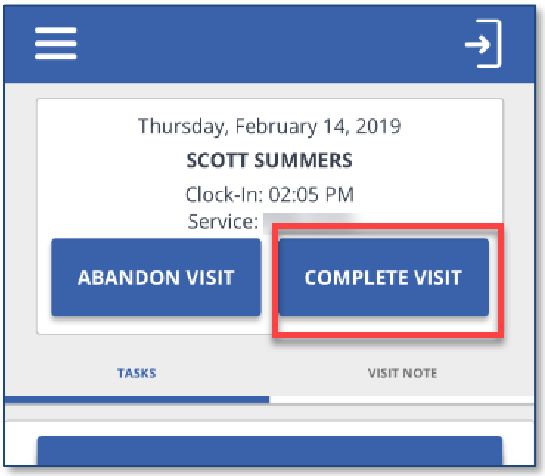


ABANDON VISIT button

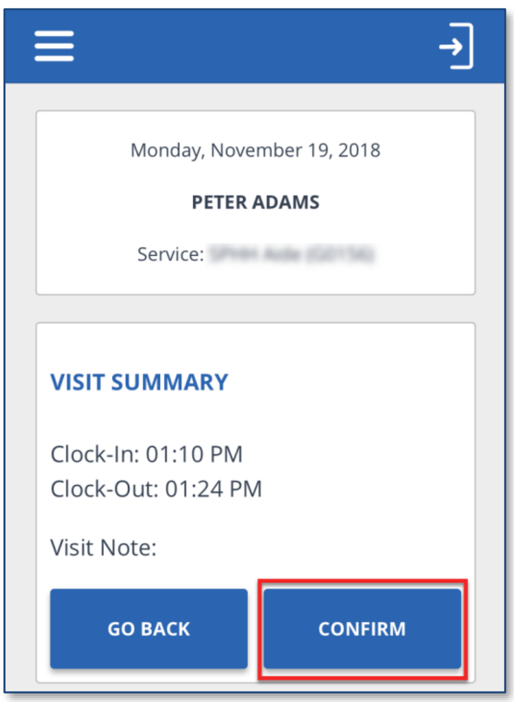
The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

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.

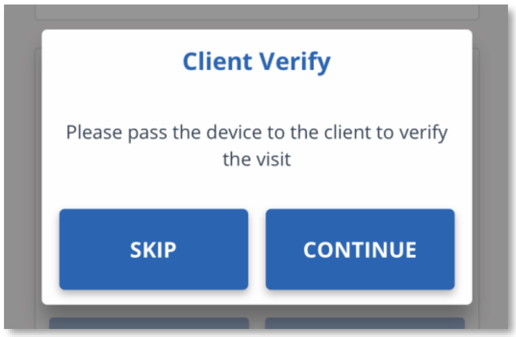
2. Tap **COMPLETE VISIT**.



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



4. The *Client Verify* screen displays. Tap **CONTINUE** and pass the device to the client or tap **SKIP**.

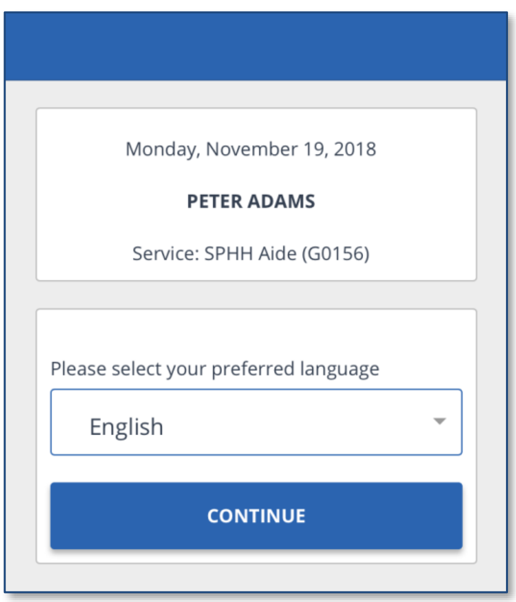


SKIP button

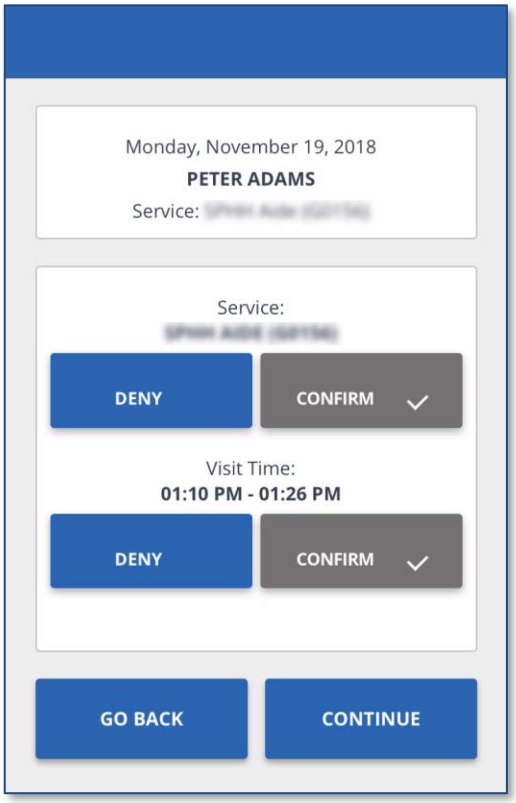
The **SKIP** button allows the in-progress visit to be completed when the client is not willing or able to verify the visit. This visit appears in Sandata EVV as an exception and must be verified in *Visit Maintenance*.

The following steps are completed by the client.

5. Tap on a language in the drop-down field then tap **CONTINUE**.



6. The *Client Confirmation* screen displays. The client must tap **CONFIRM** or **DENY** for the *Service* and *Visit Time,* then tap **CONTINUE**.

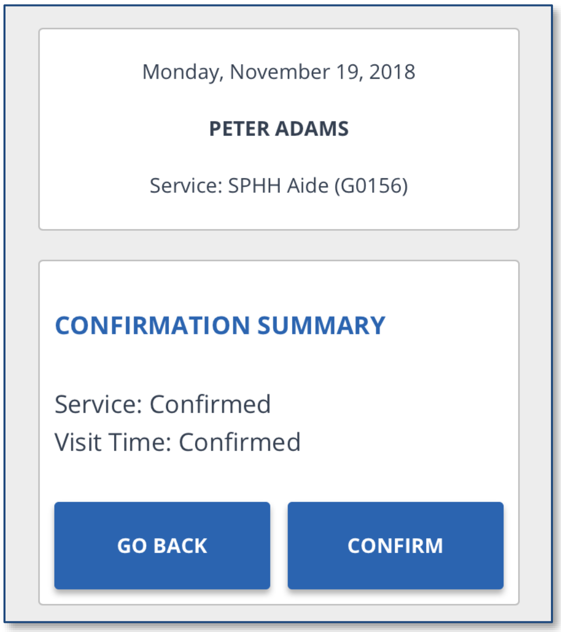


Client Confirmation

The client cannot bypass the confirmation screen; they must choose **CONFIRM** or **DENY** for each item before the **CONTINUE** button is enabled.

If the client taps **DENY** for either item on the visit, a *Visit Verification* exception is created for the visit in Sandata EVV *Visit Maintenance*.

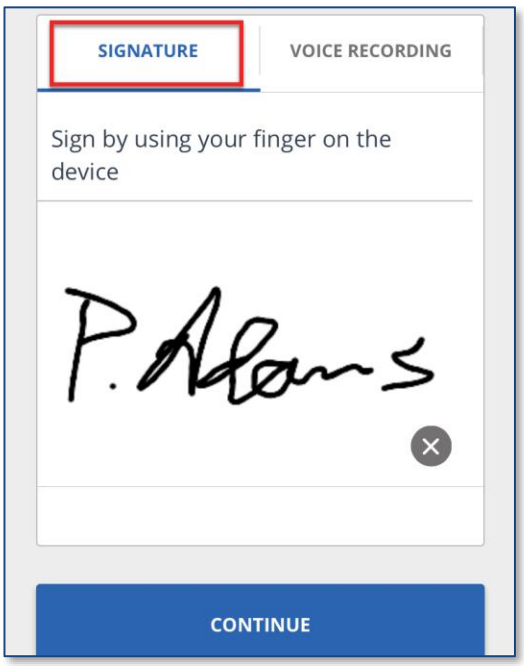
7. The *Confirmation Summary* screen displays. Tap **CONFIRM** (Tapping **GO BACK** returns the user to the previous screen).



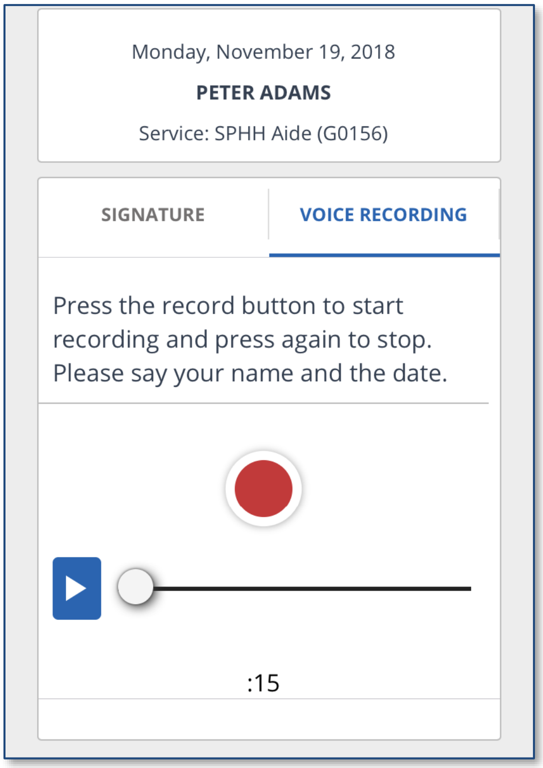
8. The *SIGNATURE/VOICE RECORDING* screen displays.

The preferred method of confirmation is to use voice recording.

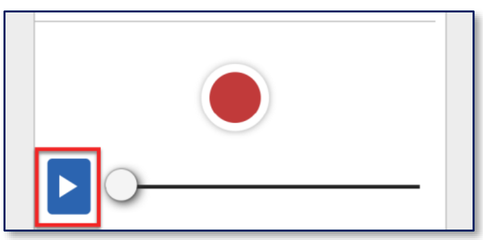
- **SIGNATURE**: Sign in the box



- **VOICE RECORDING**: Tap the circle to record your name and the date. Tap the circle again to end the recording.



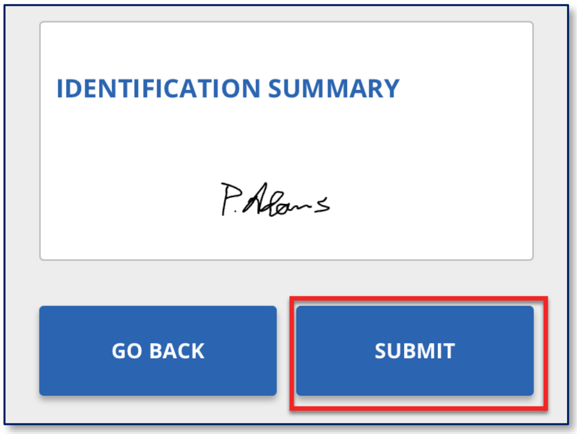
To review the recording, simply tap the **Play** icon.



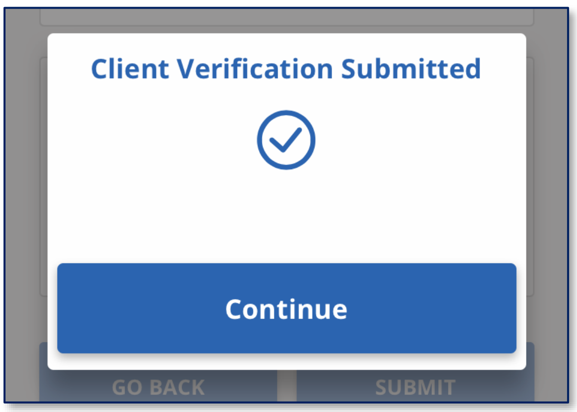
9. After signing or recording the voice, tap **CONTINUE**.

If both voice recording and signature exists, SMC prompts the user to choose which confirmation to associate to the visit.

10. The Identification Summary screen displays. Tap **SUBMIT**.



11. Tap **CONTINUE**. The visit is successfully submitted and the *Login* screen displays.



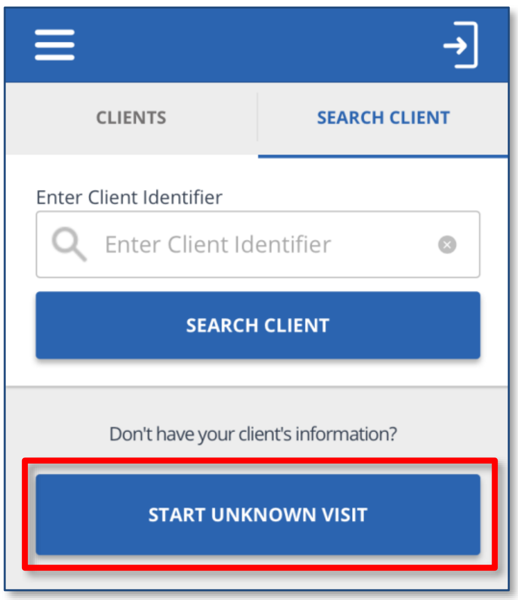
If a caregiver provides continuous care to a client for multiple days in a row (e.g. Monday – Thursday), the caregiver must check in and out every 24 hours. Visits that are in progress for more than 24 hours are automatically closed by SMC after the 25th hour.

Starting and Completing an Unknown Visit

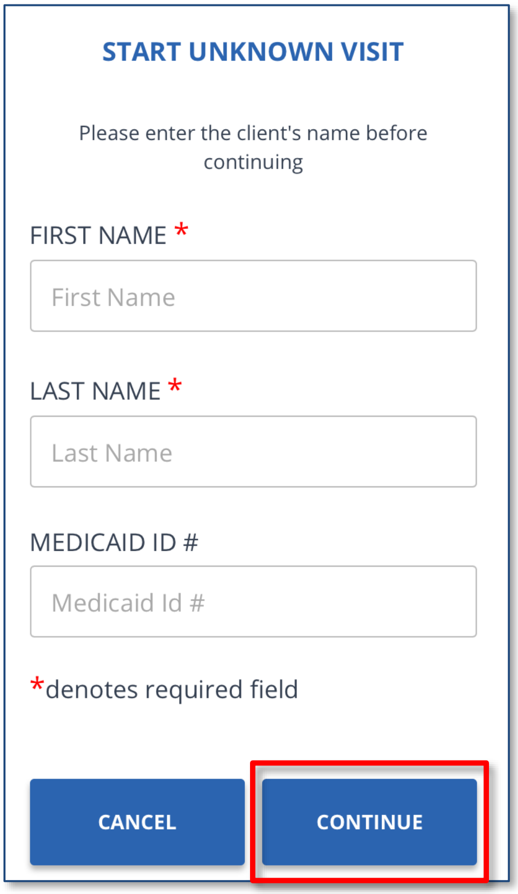
If the Client Identifier entered to search for a client is not found when trying to start a visit, the employee can start an unknown visit. Unknown visits appear in the system as visits that require further review.

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

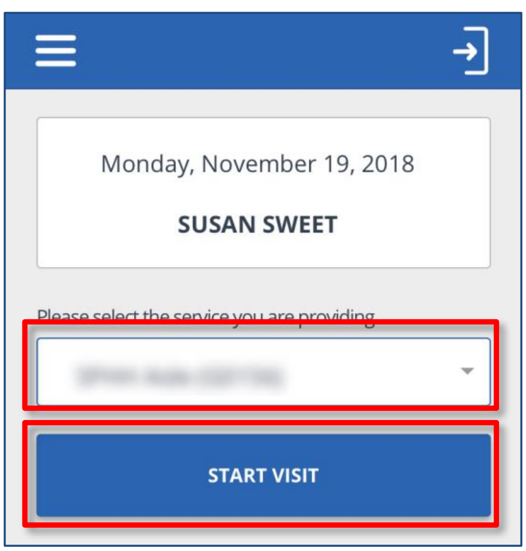
1. Log in to SMC.
2. Tap **START UNKNOWN VISIT**.



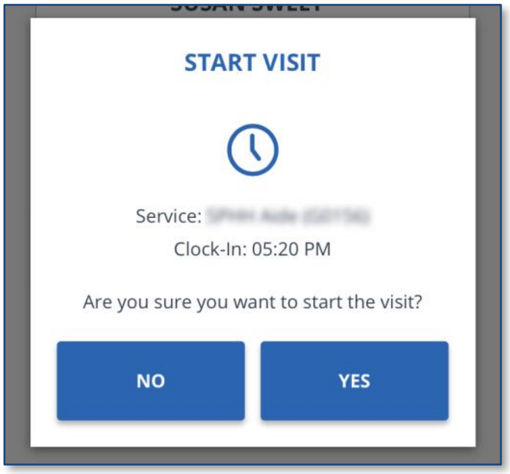
3. Enter the following information for the client and tap **CONTINUE** (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
   - **FIRST NAME** (Required)
   - **LAST NAME** (Required)
   - **MEDICAID ID #** (Optional – if available)



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.

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

6. Log out of the SMC app.

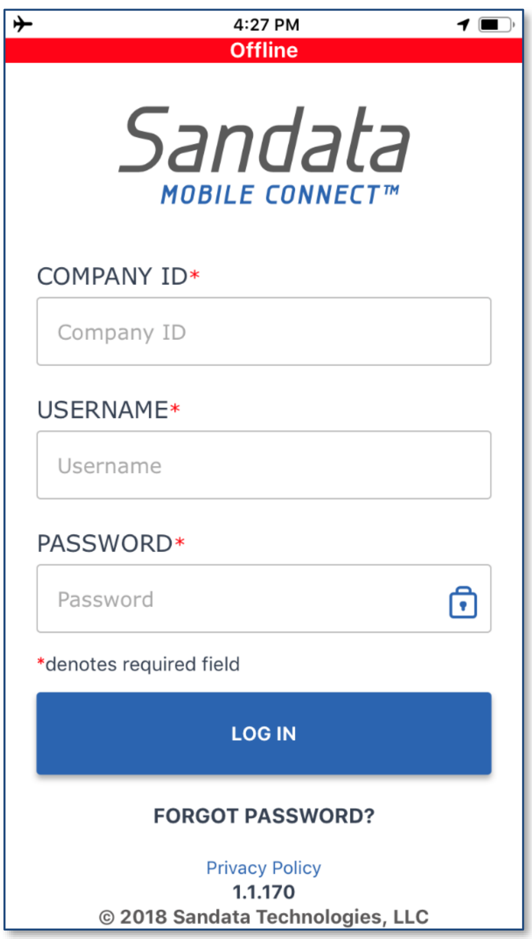
Using SMC in an Offline Mode

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 visits.

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

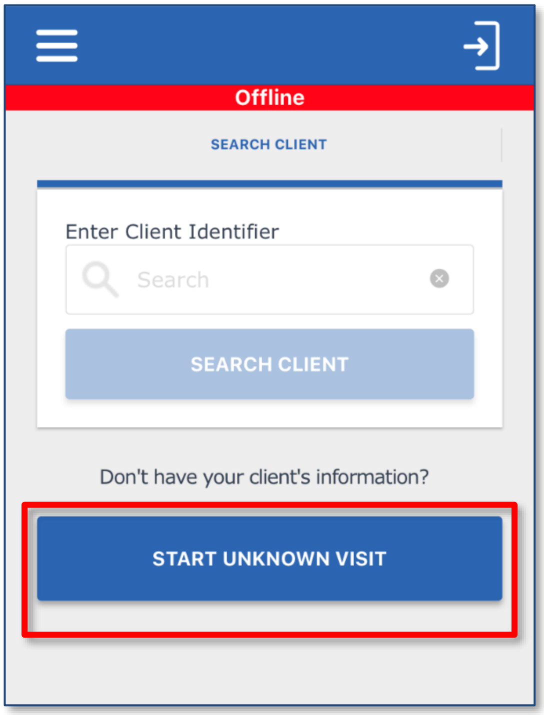
Logging in to SMC Offline

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.

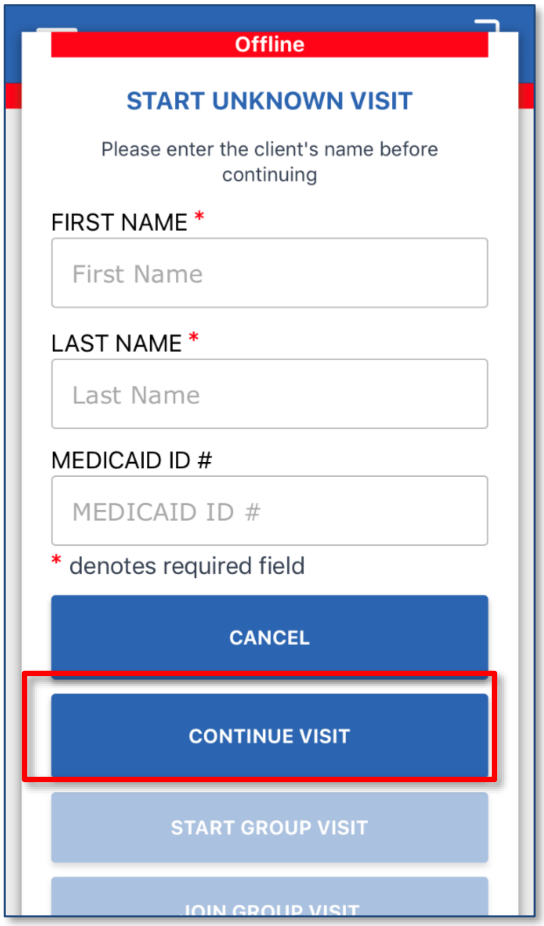


Starting an Unknown Visit Offline

- Tap **START UNKNOWN VISIT**.



- 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 a phone associated to the client.

Call Reference Guide SAMPLE

Calling Instructions STX«ACCOUNT»

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

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

15. Press '1' to record the client's voice.

OR

Press '2' if the client is unable to participate then skip to step 20.

16. Hand the phone to the client and the client will be asked to state their first and last name and today's date.

Santrax will say: **"Please say your first, last name and today's date."**

17. The client should say their first, last name and today's date.

NOTE:
The system may skip the following prompts. If the prompt is skipped, please continue with the next prompt, or hang up if done.

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

18. The client should press the appropriate option.

Santrax will say: **"The service performed was (SERVICE). Press one to confirm, two to deny."**

19. The client should press the appropriate option.

Santrax will say: **"Please enter second client ID or hang up if done."**

20. Enter the ID for the second client receiving service.
21. Follow the prompts to enter client IDs until all clients that share this call time have been entered.

NOTE: *If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say:* **"Thank you, bye."**

22. Hang up.

santrax®
ELECTRONIC VISIT VERIFICATION™

Call Reference Guide:

«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

____

Write your Santrax ID number above for easy reference.

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

Features:

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

SAMPLE

Calling Instructions STX«ACCOUNT»

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.

Remember: When speaking to Santrax on any toll-free line, speak in English, slowly and clearly one digit at a time (1075 = one, zero, seven, five).

1. **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 second toll-free number.

   The Santrax system will say: **"For English, please press one (1). For Spanish, please press two (2). For Somali, please press three (3). For Chinese Mandarin, please press four (4). For Arabic, please press five (5). For Russian, please press six (6).**
   These prompts are heard in their respective languages.
2. **Press the number that corresponds to the language you wish to hear.**
   All prompts for the remainder of the call will be heard in that 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: **"Please select "1" to call in or "2" to call out."**
4. **Press the one (1) key to "Call In".**

   Santrax will say: **"Received at (TIME) Please enter first client ID or hang up."**
5. **Enter the ID for the first client receiving service.**

   Santrax will say: **"Please enter second client ID or hang up if done."**
6. **Enter the ID for the second client receiving service.**
7. **Follow the prompts to enter client IDs until all clients that share this call time have been entered.**
   <u>NOTE:</u>
   If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say: **"Thank you, bye."**
8. **Hang up.**

Calling Instructions STX«ACCOUNT»

Calling Out: When leaving the client's home, make sure you have the following information:

- Your Santrax ID.
- The Service ID.
- The Client is available to verify the visit.

9. **Follow steps ❶ – ❸, and then continue.**

   Santrax will say: **"Please select "1" to call in or "2" to call out."**
10. **Press the two (2) key to "Call Out".**

    Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
11. **Enter the ID for the first client receiving service.**

    Santrax will say: **"Please enter the Service ID."**
12. **Press the Service ID Number you performed.**
    Refer to your agency's Service list.

    Santrax will say: **"You entered (SERVICE). Please press "1" to accept, "2" to retry."**
    Once the service has been entered, the system will repeat it back to you. If the service is incorrect, press "2" to re-enter the service. When the service is correct, press "1" to accept.
13. **Press the one (1) key to accept, or press the two (2) key to retry.**

    Santrax will say: **"Enter number of tasks."**
14. **Press the total number of tasks performed for the client.**

    Santrax will say: **"Entered task ID."**

    Press the Task Number you preformed.

    <u>NOTES:</u>
    - *Refer to your agency's task list.*
    - *If you performed more than one task, wait for the system to confirm the task and then enter the next task number until you have entered all tasks performed during the visit.*

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

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

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

For each prompt, Santrax allows a caller three attempts to enter the information correctly. After three 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 prompt for to select a language. Each prompt will be heard in its respective language followed by a selection number. (i.e. "For English, press 1; for Spanish, press 2, etc.)
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 prompt for to select a language. Each prompt will be heard in its respective language followed by a selection number. (i.e. "For English, press 1; for Spanish, press 2, etc.)
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."
8	Enter the ID of the task performed. Santrax will playback the task description. (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.

	After the tasks, *Santrax will say: "To record the client's voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate.* Press (1) to record client's voice (hand phone to client): *Santrax will say: "Please say your first and last name and today's date."* The client will say their name and the date *Santrax will say: "In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press one to confirm, two to deny."* Client will press appropriate choice. *Santrax will say: "The service performed was [service]. Press one to confirm, two to deny."* Client will press appropriate choice. *Santrax will say: "Thank you, bye."* Hang up. Press (2) if the client is unable to participate. *Santrax will say: "Thank you, bye."* Hang up.

Visit Scenarios (SMC and Telephone)

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.
  - Telephone – 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.
  - Telephone – 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.
- Telephone — 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.
- Telephone – 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.
- Telephone – 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.
- Telephone – 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.
- Telephone – the employee will call in upon arriving and call out when leaving.

Consecutive Days Visits

If a caregiver provides continuous care to a client for multiple days in a row (e.g. Monday – Thursday), the caregiver must check in and out every 24 hours.

A visit that is in progress for more than 24 hours is automatically closed by SMC after the 25^{th} hour.

FVV

Fixed Visit Verification (FVV) is a process that allows a caregiver to clock-in and clock out for a visit in instances when a client does not have a phone or is unwilling to allow the caregiver to use their phone, and the caregiver does not have the ability to download the mobile App.

The process uses a small device that is requested by the provider agency, registered to a client and shipped to the client's home. The device remains in the client's home for use by all caregivers who provide care to that client.

The FVV device generates a 6-digit value each time it is pressed. The value represents the date and time at that instance. When a caregiver arrives at a client's home which has an FVV device registered, the caregiver locates the device, presses the button and makes note of the 6-digit value displayed. The value represents the date and start time of the visit. At the end of the visit, the caregiver presses the button again and makes note of the new 6-digit value. The second value represents the date and end time of the visit. At the end of the day, when the caregiver has access to a telephone, he/she dials into the provider agency's assigned toll-free number and enters the FVV values for that day's client visit(s).

Call Reference Guide SAMPLE

FVV information:
Fixed Visit Verification (FVV) acts as a proof of work system. It allows the user to check in and check out from the client's home (like a time clock) without the use of the client's home telephone. This is done through the use of an FVV Device.

Common Phrases Related to FVV Usage:
Visit Verification Number - This is the six-digit number that is displayed on the FVV Device's screen when either FVV button is pushed.
Visit Verification Value – This is the actual date and time represented by the six-digit visit verification number.

The FVV Device:
- Is assigned to a specific agency and client.
- Is placed in the client's home.
- Is not a recording device.
- Is used by the attendant to check in and check out.

Important Information:
- Wait at least 15 minutes after the FVV Device button is pushed before making a call into Santrax for that visit.
- Both of the six-digit visit verification numbers obtained from the FVV Device will be entered during one Santrax call.
- If you think you have made a mistake entering the six-digit visit verification numbers during the Santrax call, contact your supervisor. Do not attempt to call again for this visit.
- When servicing two clients in the same household (a mutual case), each client will be assigned their own FVV Device. This means that the field staff will need to check in and check out for each client separately (two devices, two sets of visit verification numbers and two calls into Santrax).

The Visit Verification Number Reference Chart:
Use the "Visit Verification Number Reference Chart" document (provided to your agency's administrator) to write down the six-digit visit verification numbers you obtained from the FVV Device's display screen during the visit. Below is an example:

Client's ID	Visit Verification #	Date	Time
15768	In: 785 615	8/1	9:00
	Out: 458 361	8/1	10:30
	In:		
	Out:		

santrax®
ELECTRONIC VISIT VERIFICATION™

Call Reference Guide:
«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

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

Features:
Fixed Visit Verification (FVV) | Tasks

SAMPLE

FVV Calling Instructions STX«ACCOUNT»

Upon Arrival:
When you arrive at the client's home, press and release either of the buttons on the FVV Device and write down the First six-digit visit verification number displayed on the device's screen, as you will use this number later to make your Santrax call. Note the date and time you pushed the button.

Before Departing:
At the end of the visit, press and release either of the buttons on the FVV Device and write down the Second six-digit visit verification number displayed on the device's screen, as you will use this number later to make your Santrax call. Note the date and time you pushed the button.

NOTE: If you need to see the number again right away, you may press and release the button one more time to display the reading. If you get a different number, that's ok, use the new number.

Do not hold the button down, always press <u>and</u> release.

Before calling into Santrax, make sure you have the following information:

- ✓ Your Santrax ID
- ✓ The Client's ID
- ✓ First Six-digit visit verification number representing the date and time of arrival (obtained at the beginning of the visit).
- ✓ Second Six-digit visit verification number representing the date and time of departure (obtained at the end of the visit).

Once you have this information, you are ready to call into Santrax!

<u>NOTES:</u>

- *Do not call into Santrax until <u>at least 15 minutes after</u> you receive the second six-digit number at the end of your visit.*
- *You must call into Santrax within <u>seven days</u> of the start of the visit.*
- *You do not need to wait at the client's location to make the call.*
- *Both of the six-digit visit verification numbers will be entered on a <u>single Santrax call</u>.*

1. **Dial any of the toll-free numbers assigned to your agency.**

   Santrax will say: **"Welcome, please enter your Santrax ID."**
   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.

2. **Press the numbers of your Santrax ID on the touch tone phone.**

   You also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.

   Santrax will say: **"Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."**

3. **Press the star (*) key.**

   Santrax will say: **"Please enter first Client ID."**

4. **Enter the Client ID.**
   If the Client ID is entered incorrectly, the Santrax system will prompt: **"No FVV registered, please re-enter the client ID or press the pound (#) key to continue."**

   Once the Client ID is entered correctly, Santrax will say: **"Please enter your <u>first</u> visit verification number or press the pound (#) key to continue."**

FVV Calling Instructions STX«ACCOUNT»

5. **Enter the first visit verification number.**
   This is the first six-digit number you obtained from the FVV Device when you arrived at the client's home and will represent your time in.

   When the visit verification number is entered correctly Santrax will confirm it by saying: **"The first visit verification number is (DATE/TIME). If this is incorrect, press 1 to retry or press the pound (#) key to continue."**

   NOTE: Listen to check that the date and time provided are the same as the date and time the button on the device was pushed. If they don't match, an incorrect visit verification number may have been entered. Press 1 to re-enter the number.

6. **Press the pound (#) key to continue.**

   Santrax will say: **"Please enter your <u>second</u> visit verification number or press pound (#) to continue."**

7. **Enter the second visit verification number.**
   This is the six-digit number you obtained from the FVV Device at the end of the visit. It will represent your time out.

   When the visit verification number is entered Santrax will confirm it by saying: **"The second visit verification number is (DATE/TIME). If this is incorrect, press 1 to retry or press the pound (#) key to continue."**

8. **Press the pound (#) key to continue.**

   Santrax will say, **"Enter number of tasks"**

9. **Press the total number of tasks performed for the client.**

   Santrax will say, **"Enter task ID"**

10. **Press the Task Number you performed.**

    <u>NOTES:</u>
    - *Refer to your agency's task list.*
    - *If you performed more than one task, wait for the system to confirm the task and then enter the next task number until you have entered all tasks performed during the visit.*
    - *If you are performing a task with a reading, Santrax will pause after receiving the Task ID. During the pause, press the appropriate reading for this task using the amount of digits indicated on the task list.*
    - *If you made a mistake entering Tasks, press "00", the system will confirm by saying:* **"Starting Over, Enter number of tasks".** *Enter all task ID's again.*

    Santrax will say: **"You entered (NUMBER) task(s)."**

11. **Hang up**

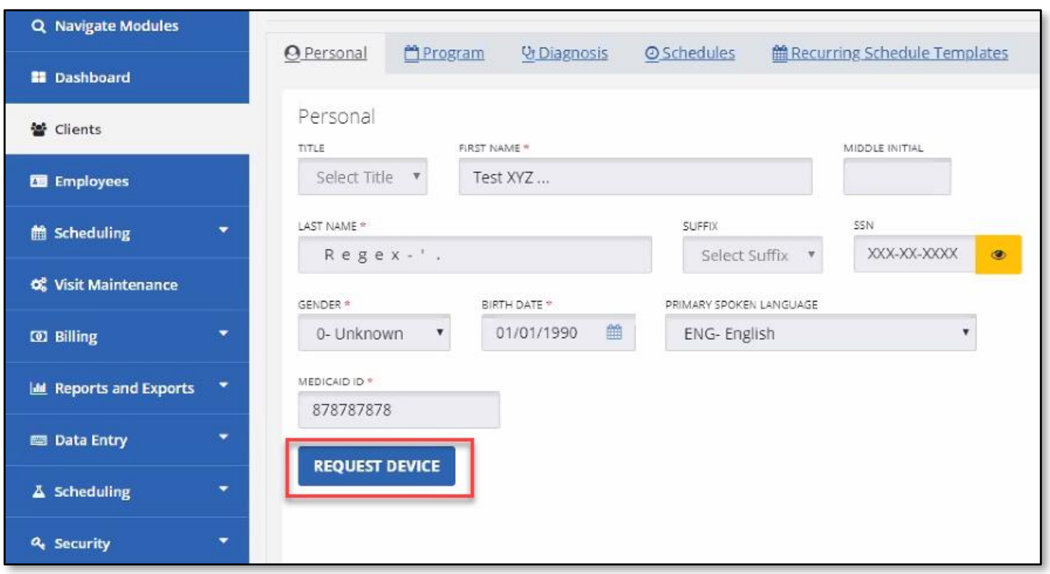
Call	
1	Dial the toll-free number.
	Santrax will prompt for to select a language. Each prompt will be heard in its respective language followed by a selection number. (i.e. "For English, press 1; for Spanish, press 2, etc.)
2	Press the number that corresponds to the desired language.
	Santrax will say: "Welcome, please enter your Santrax ID."
3	Press the numbers of your Santrax ID on the touch tone phone.
	Santrax will say: "Received at [Time]. If this is a Fixed Visit Verification visit, press the star key to enter the visit verification numbers; otherwise, press the pound key to continue" (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)
4	Press the star (*) key.
	Santrax will say: "Please enter first client ID."
5	Enter the client ID.
	Santrax will say: "Please enter your first visit verification number or press the pound (#) key to continue."
6	Enter the 6-digit value noted at the start of the visit.
	Santrax will say: "The first visit verification number is (Date/Time). If this is incorrect, press 1 to retry or press the pound (#) key to continue."
7	Press the pound (#) key.
	Santrax will say: "Please enter your second visit verification number or press the pound (#) key to continue."
8	Enter the 6-digit value noted at the end of the visit.
	Santrax will say: "The second visit verification number is (Date/Time). If this is incorrect, press 1 to retry or press the pound (#) key to continue."
9	Press the pound (#) key.
	Santrax will say: "Enter the Service ID."
10	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."
11	Please press 1 to accept, 2 to re-enter
	Santrax will say: "Enter number of tasks."

12	Enter the total number of tasks performed for the client.
	Santrax will say: "Enter task ID."
13	Enter the ID of the task performed. Santrax will playback the task description. (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.

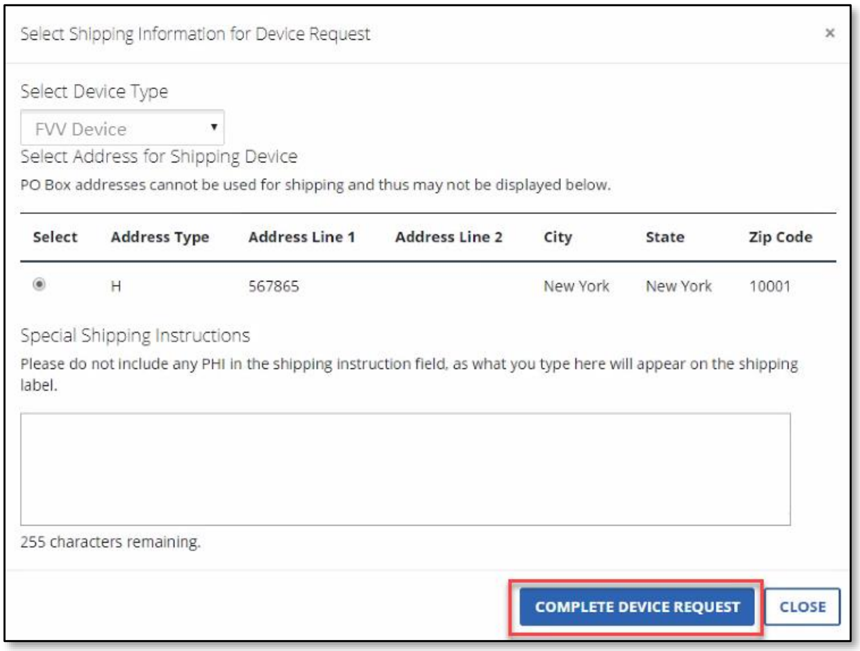
Requesting a Device in EVV

An EVV Device can also be requested from the client record in Sandata EVV simply by clicking the **REQUEST MOBILE DEVICE** button on the client record screen.

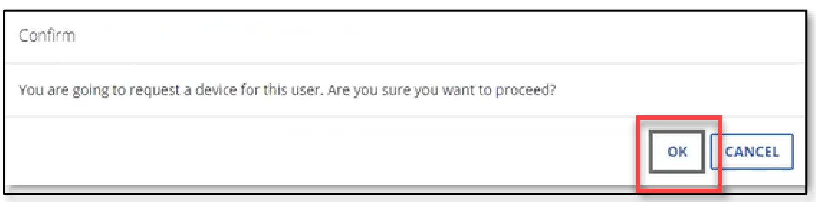
1. Search for and locate the client record.
2. Click the Edit icon to open the client record.
3. Click the **REQUEST DEVICE** button.



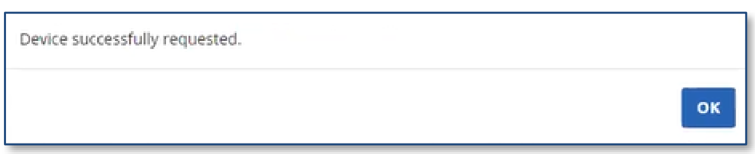
4. Select or confirm the Shipping address (If the client has multiple addresses, the primary address is selected by default). Enter special shipping instructions into the text box if needed (e.g. please go to side door).



5. Click **COMPLETE DEVICE REQUEST**.
6. A request confirmation screen appears. Click **OK** to complete the order.



7. A success message appears at the top of the screen.



7 Visit Maintenance

Module Time

75 minutes

This lesson explains how to use the Sandata EVV *Dashboard* to view current day visits. 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
GPS	Global Positioning System
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 reviewed, corrected and/or acknowledged to clear issues.

Introduction

The Sandata EVV *Dashboard* and *Visit Maintenance* module gives users with the appropriate permissions, the ability to monitor visit activity in real-time. It allows visits with system identified issues to be updated, ensuring that all necessary information is included.

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.

If a visit is missing any of the information mentioned above or if a visit does not meet the program rules, it appears in Visit Maintenance with one or more exceptions. An exception on a visit, such as 'Visit without Out-Calls', would be applied if a check-in was received but there is no check-out.

Exceptions are grouped by those that must be fixed and those that must be acknowledged. An exception that needs to be fixed means information must be entered to clear the exception. An exception that needs to be acknowledged means the user must accept the exception occurred.

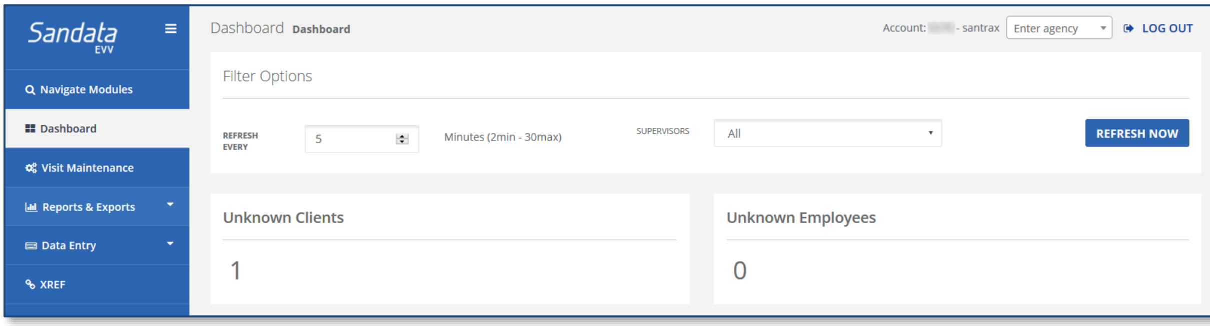
Agencies should review *Visit Maintenance* daily, looking at the previous day's visits and clear exceptions as appropriate. Once all exceptions are cleared from a visit, the visit has a status of verified. A verified visit means that it has all required information and the information meets the program rules.

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

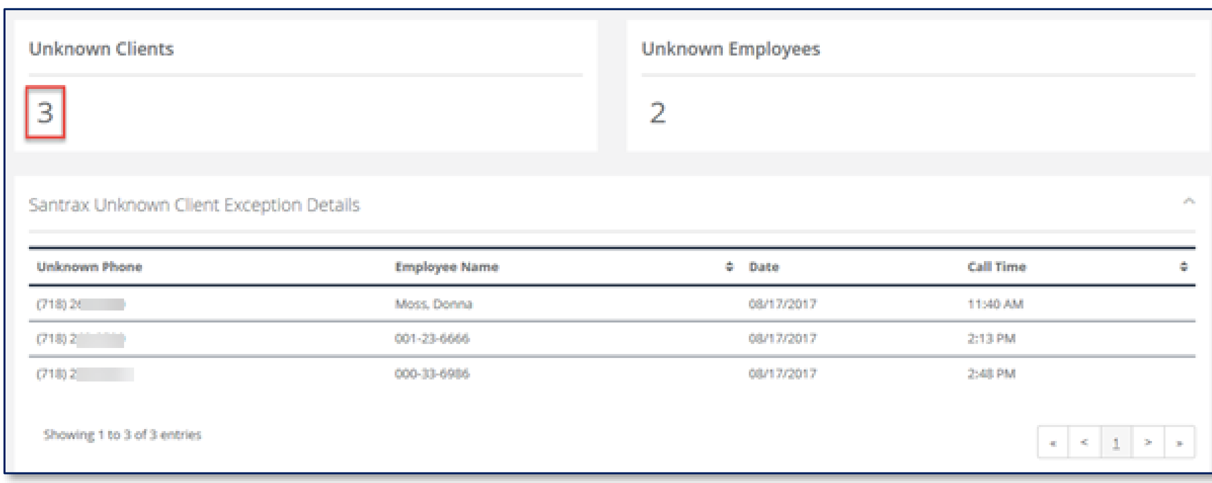
Sandata EVV Dashboard

The Sandata EVV *Dashboard* monitors current day's visits, identifying when a client could not be identified (Unknown Client) or the employee could not be identified (Unknown Employee).

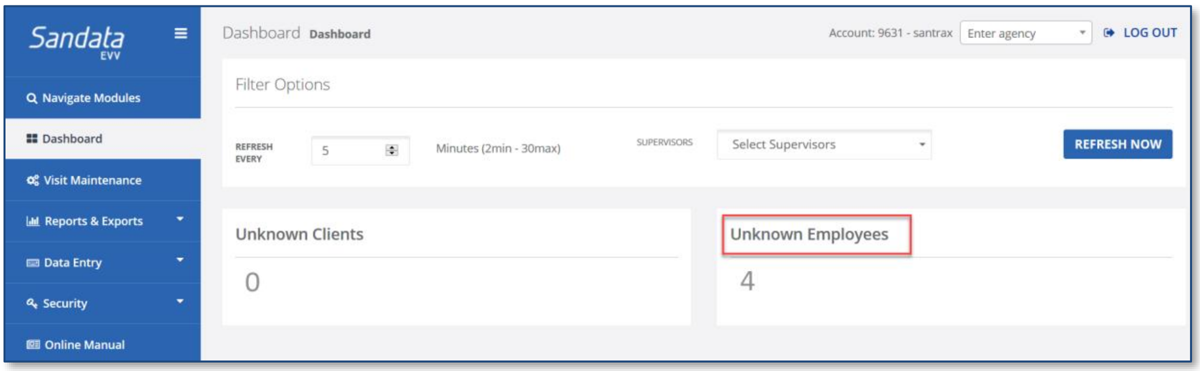
The data defaults to refresh every five minutes but can be changed to refresh between 2 – 30 minutes. All exception types can be viewed in *Visit Maintenance*.

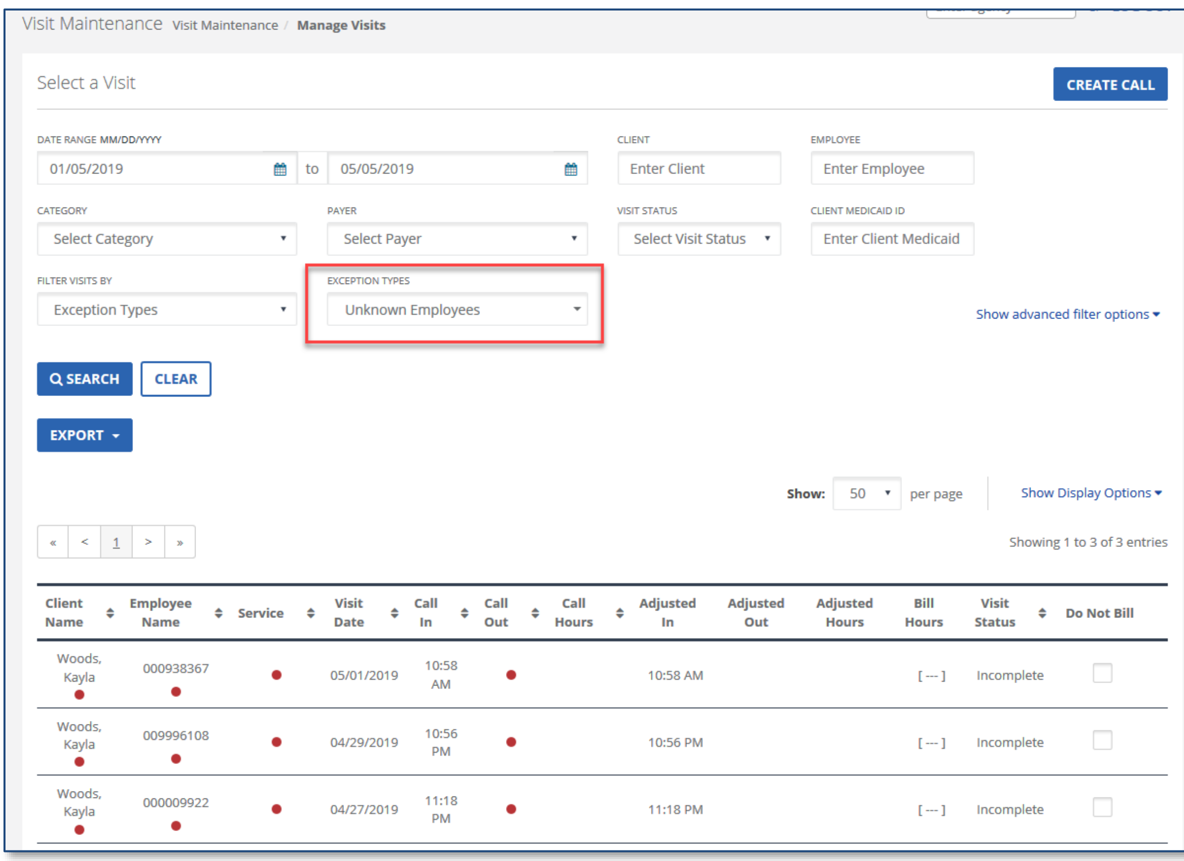


Click the exception category total to display a listing of the visit exception details for that specific exception.

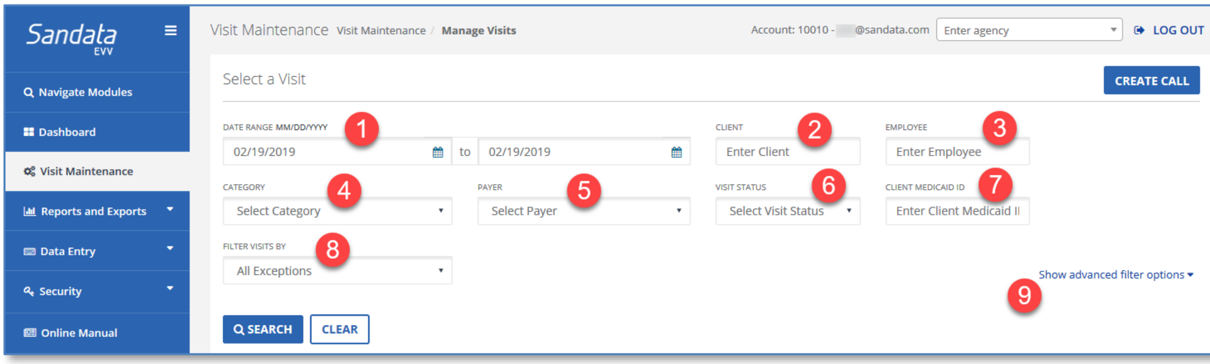


Click the exception category name to link to the *Visit Maintenance* module to view and edit the visits for that exception.





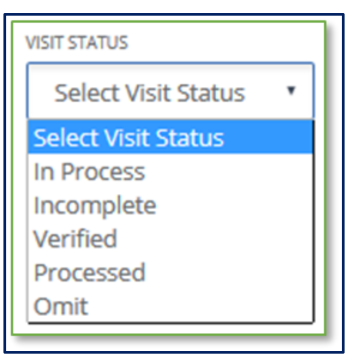
Visit Maintenance – Main Screen



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**: Displays a list payer groups if appropriate for configuration. Otherwise, drop-down will be blank.
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:



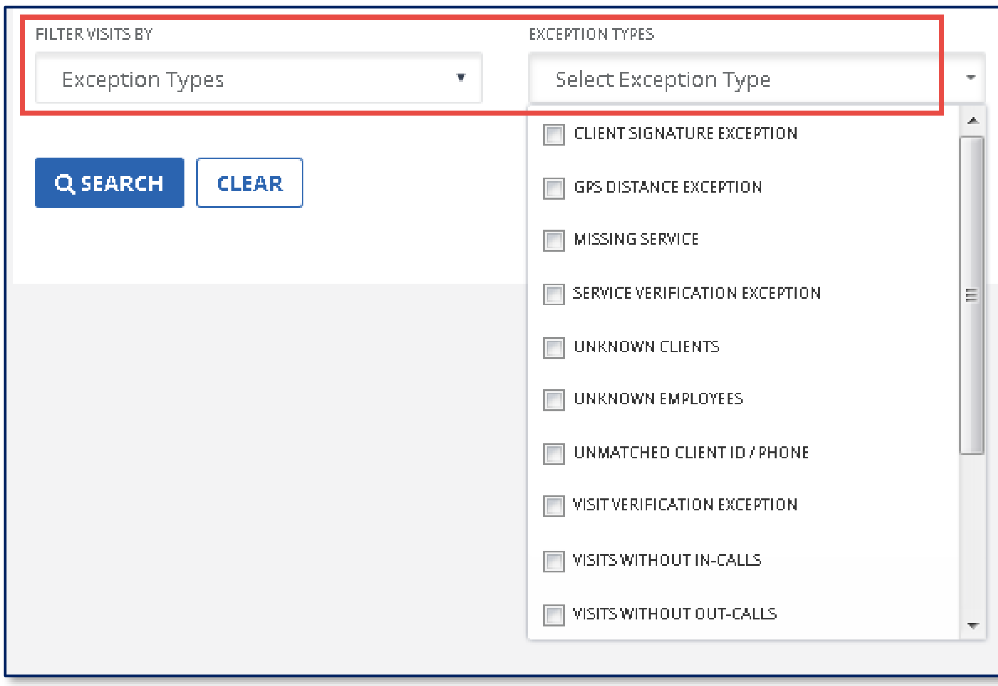
Status	Description
In Process	A visit that has started and not yet completed.
Incomplete	A visit that has exceeded a 24-hr. period and is still missing a call-in/call-out.
Verified	A visit that does not contain any exceptions and is eligible for billing.
Processed	A visit that does not contain any exceptions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

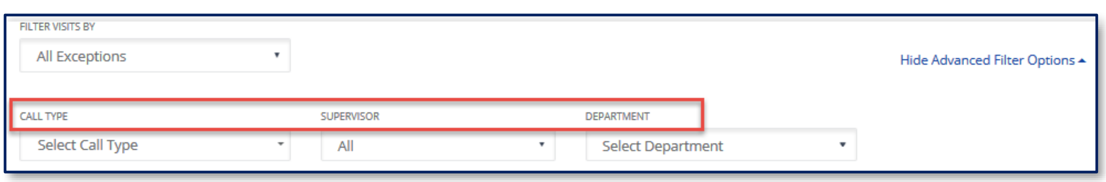


Exception	Description
CLIENT SIGNATURE EXCEPTION	Client's digital signature or voice recording is missing.
INVALID SERVICE	Service selected on TVV call does not match service for the client.
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the SMC call-in or Telephony call-out.
SERVICE VERIFICATION EXCEPTION	Client did not confirm the selected service.

Exception	Description
UNKNOWN CLIENTS	Identifies when a visit occurs where the client is not known to the system. 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 VERIFICATION EXCEPTION	Identifies when the start and/or end time have not been verified by the client at the end of the visit, either by confirming during the SMC call-out or verifying the times during the Telephony call-out.
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.

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

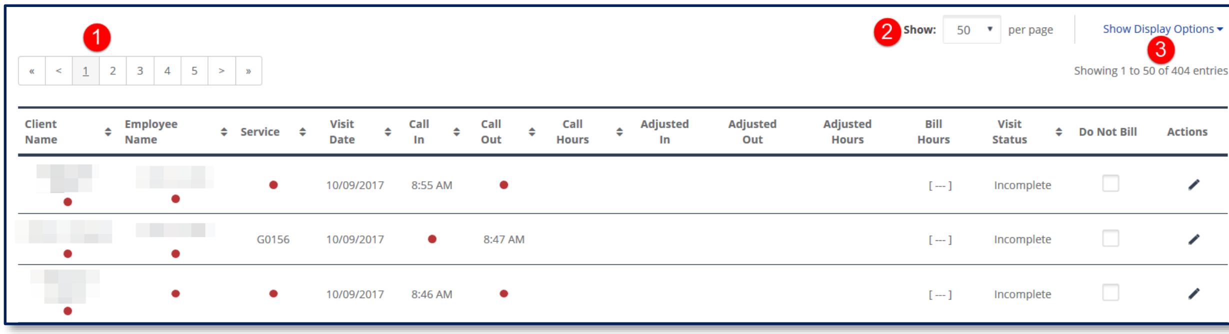
9. **Show Advanced Filter Options:** Displays additional filters such as **Call Type, Supervisor** and **Department**.



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 grouped by departments.

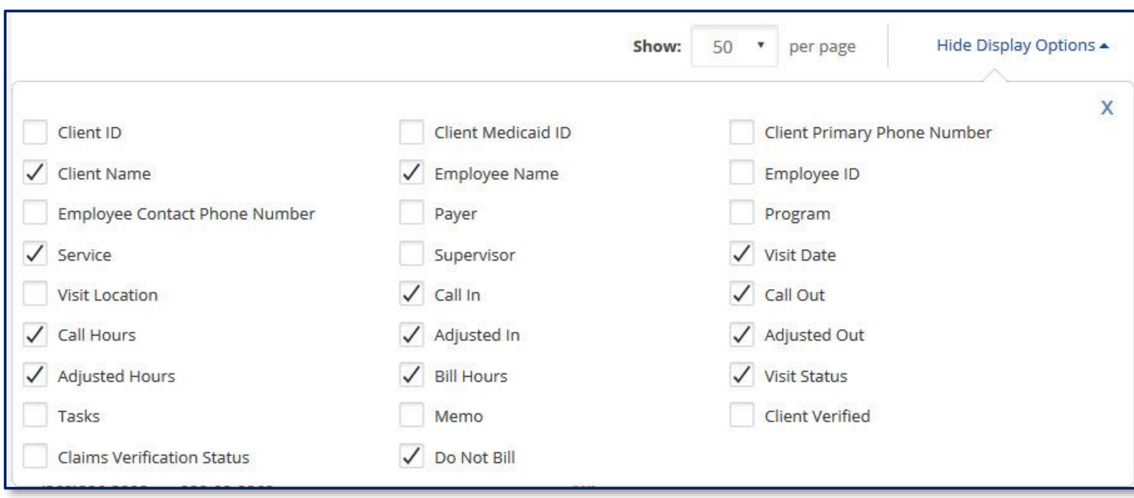
Search Results – Understanding the Visit Grid

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**

TIP

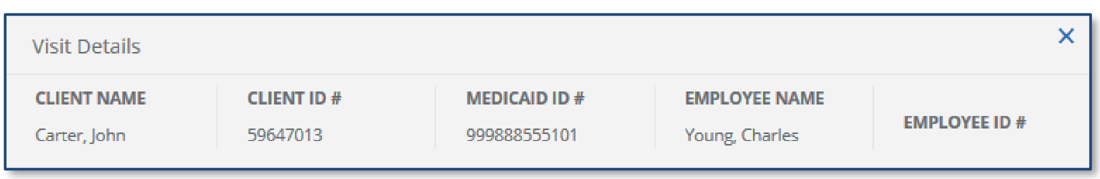
Hovering the mouse over an exception indicator displays a tool tip for that exception detail.

Reviewing a Visit

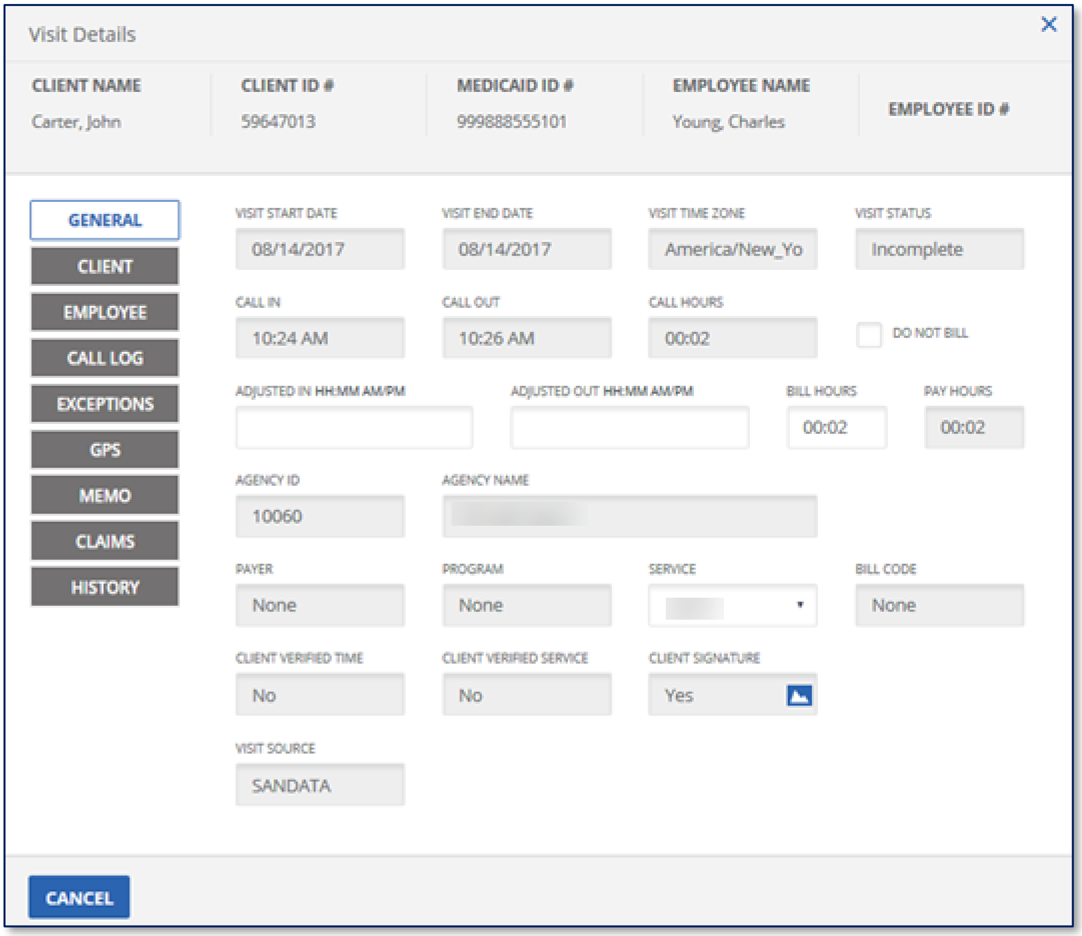
To view the details of a visit, either click on the visit line or click **Edit** to the right of the line to display the *Visit Details* screen.

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

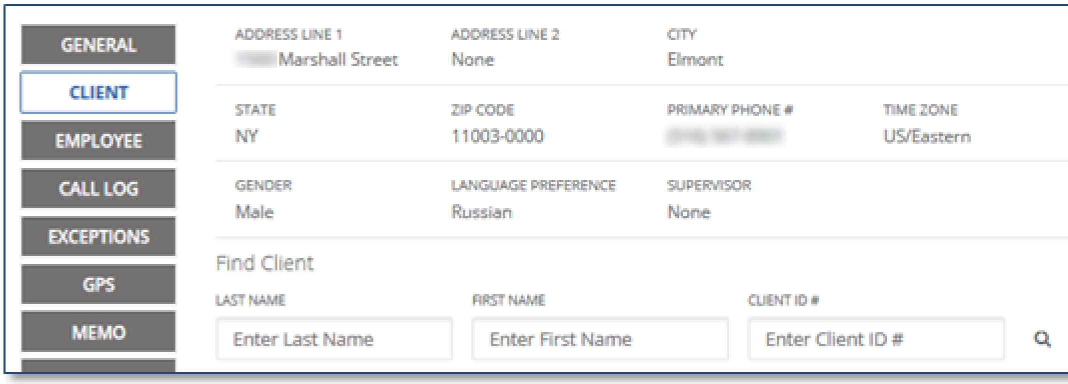
The top of *Visit Details* screen contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME** and **EMPLOYEE ID** information. There are also tabs on the left which display various details of the visit.



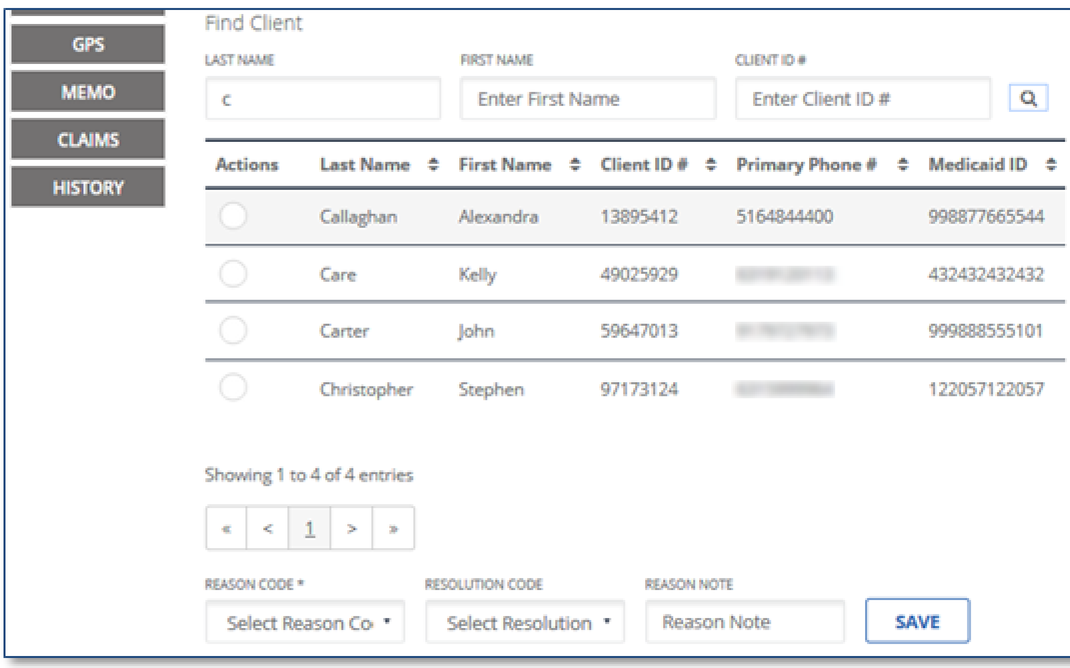
- *GENERAL:* contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, EMPLOYEE ID, VISIT START DATE, VISIT END DATE, VISIT TIME ZONE, VISIT STATUS, CALL IN, CALL OUT, CALL HOURS, DO NOT BILL, ADJUSTED TIMES, BILL HOURS, PAY HOURS, AGENCY ID, AGENCY NAME, PAYER, PROGRAM, SERVICE, BILL CODE**, client verification results (**CLIENT VERIFIED TIME, CLIENT VERIFIED SERVICE**), **CLIENT SIGNATURE** (signature or voice recording) and **VISIT SOURCE**.



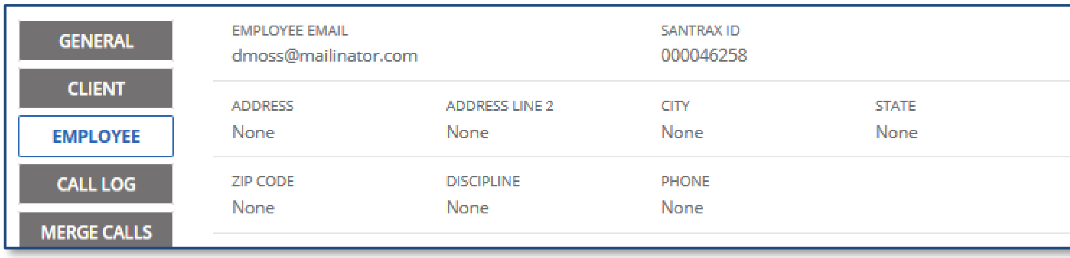
- *CLIENT:* This screen displays the client's details such as **ADDRESS, PHONE NUMBER** and **LANGUAGE PREFERENCE**.



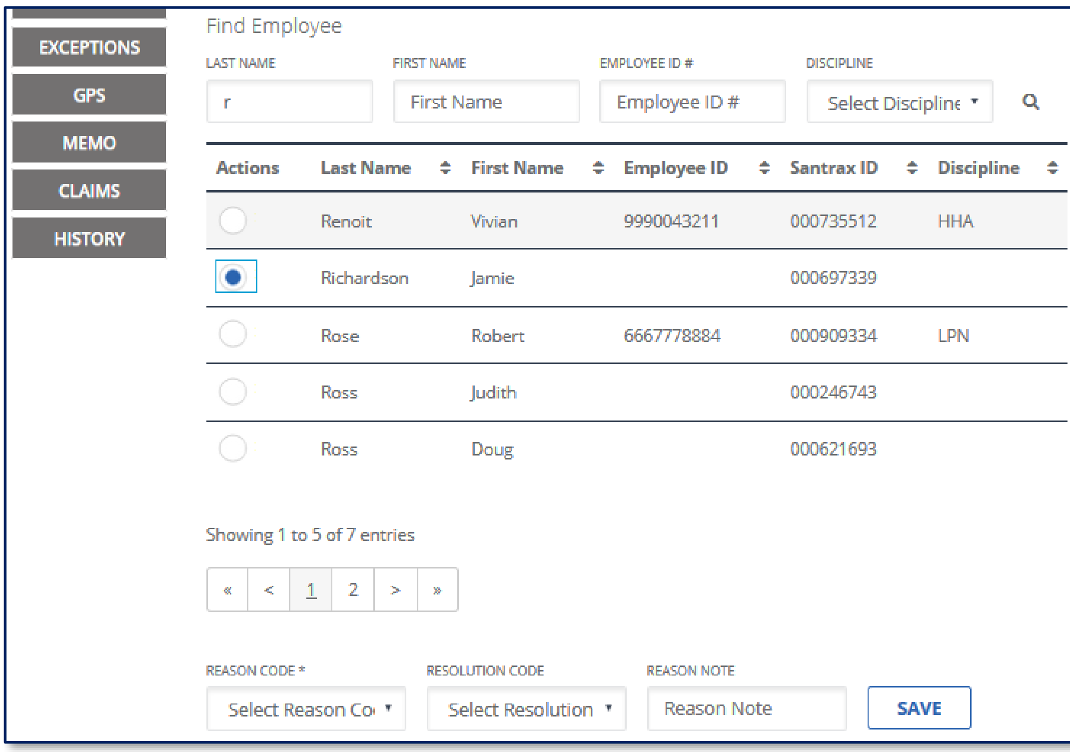
The screen also includes an option to change the client for the visit, in instances when the client is unknown or was entered incorrectly.



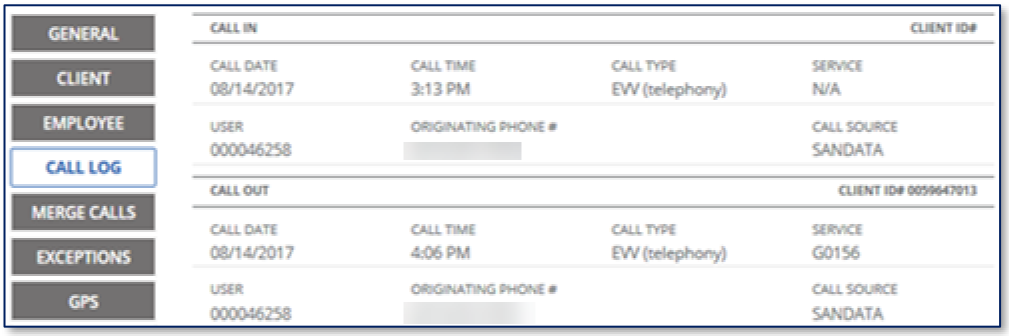
- *EMPLOYEE:* This screen displays the employee details such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS and PHONE.**



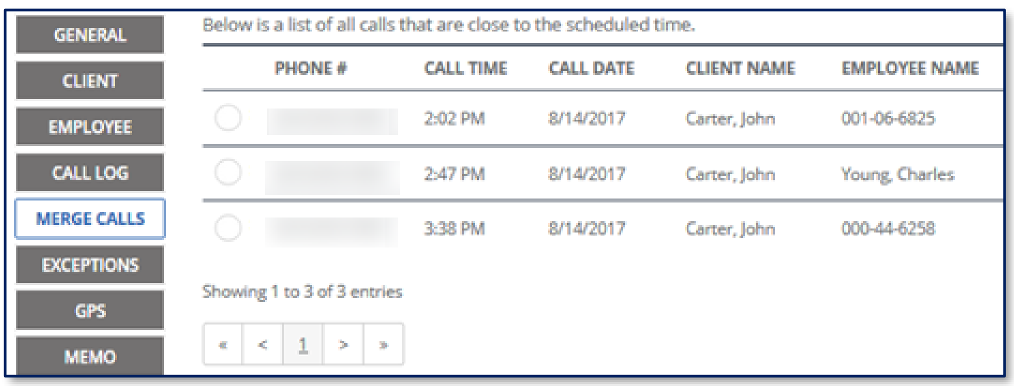
The screen also includes an option to change the employee for the visit, in instances when an incorrect Santrax ID was entered for the visit.



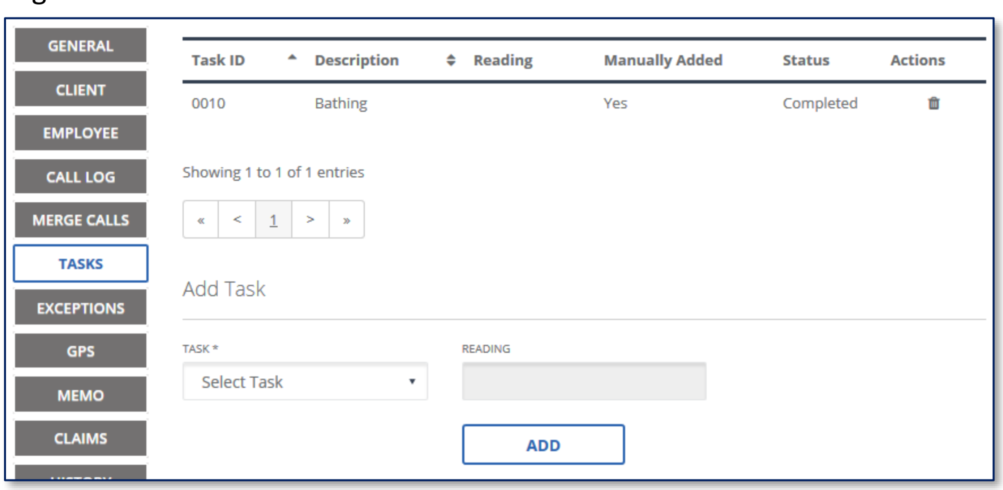
- *CALL LOG:* This screen shows the details of the call-in/call-out times and the type of call (Mobile, Telephony, FVV and Manual). If a visit is missing a call, a call can be manually added from this screen.



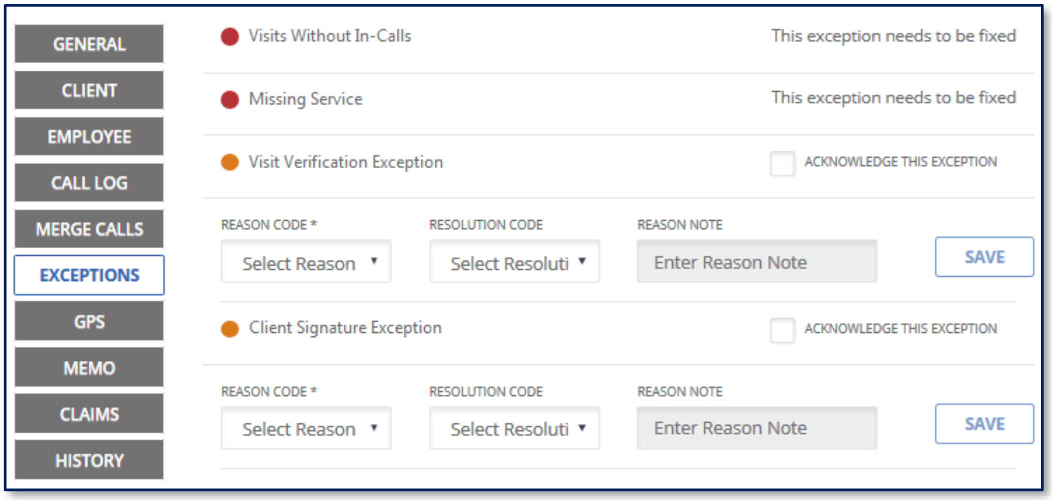
- *MERGE CALLS:* This screen only displays when calls are available that may be merged to the visit when the visit is missing a call time. Calls can be merged if they are within time proximity and not associated with any other visit.



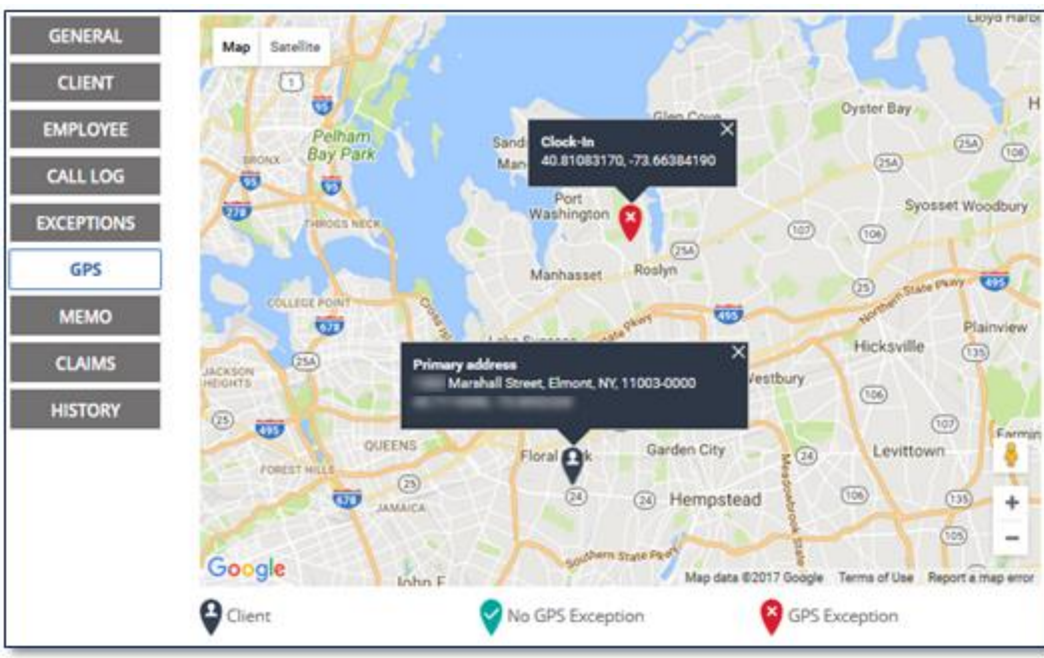
- *TASKS:* This screen shows the tasks that were entered by the employee during the visit. A user with the appropriate permissions can add additional tasks to the visit or delete existing tasks if needed.



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

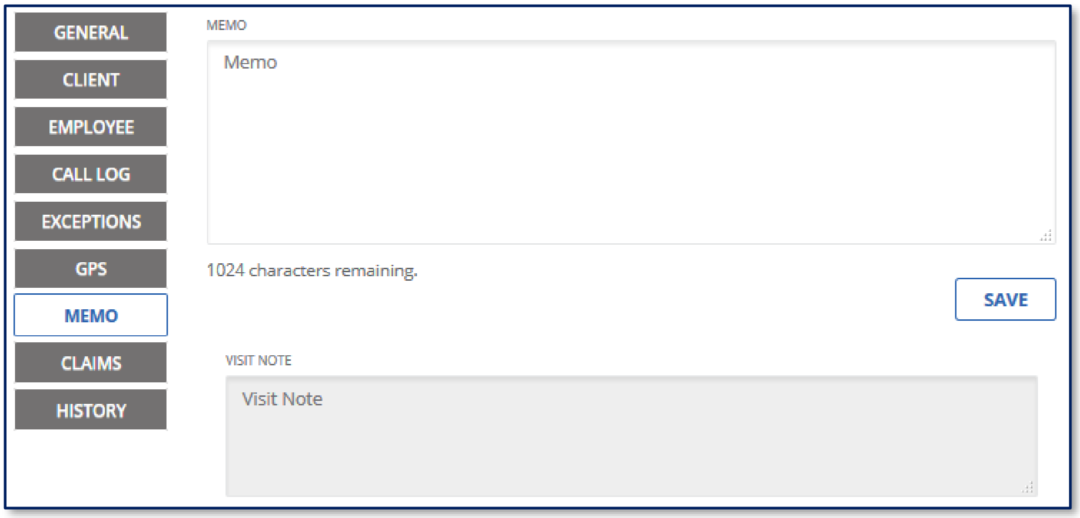


- *GPS:* This screen shows the location of the SMC call-in/call-out times relative to the client's home.

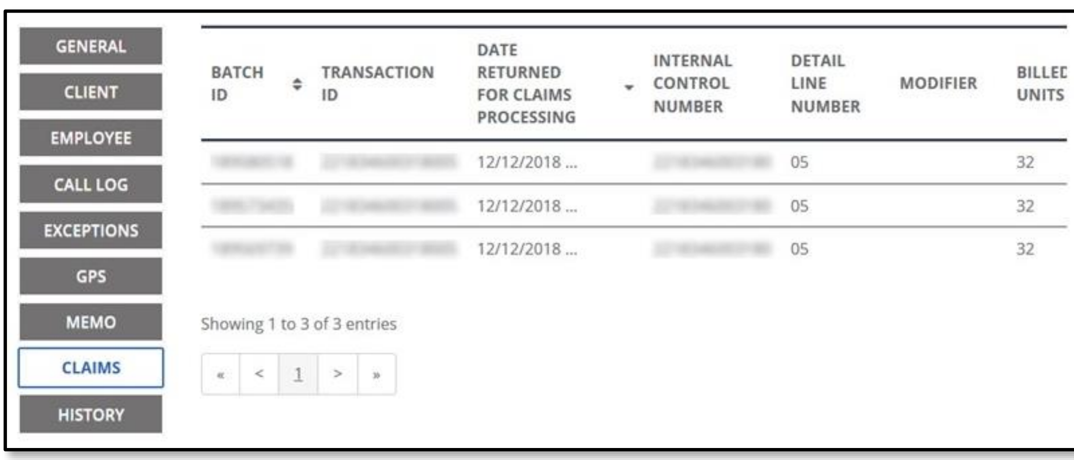


- *MEMO:* This screen allows the user to make a note and display notes previously entered related to the visit. It also includes a *Visit Note* screen which displays notes entered into SMC during call-out.

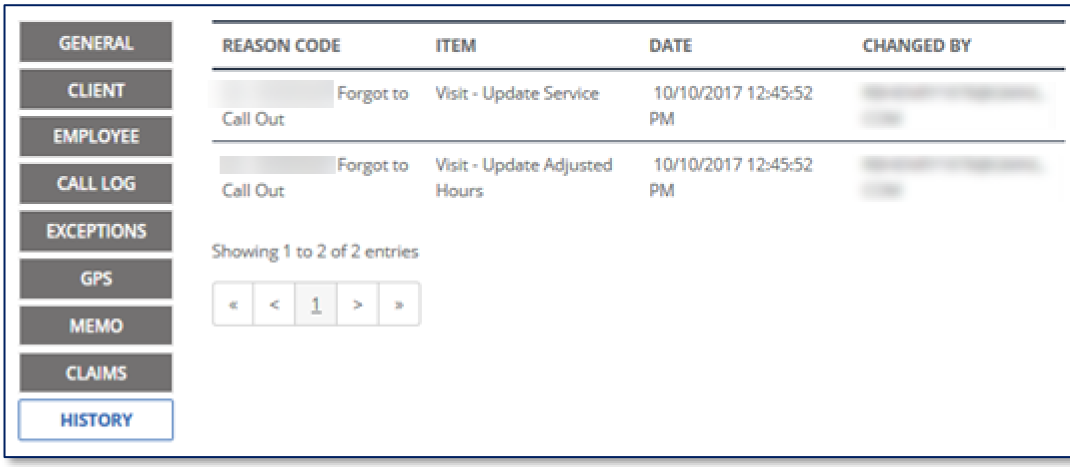
This information should not be used to fulfill documentation requirement.



- *CLAIMS*: This screen shows the batch, transaction and date/time each time the visit was returned to the adjudication system (if applicable based on program requirements).



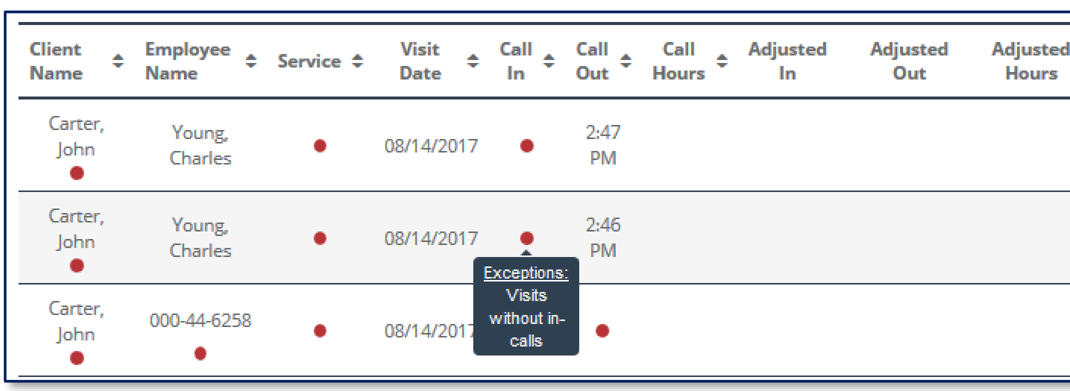
- *HISTORY*: This screen contains the audit history for the visit. Any change made to the visit is tracked and listed on this screen with the most recent change at the top.



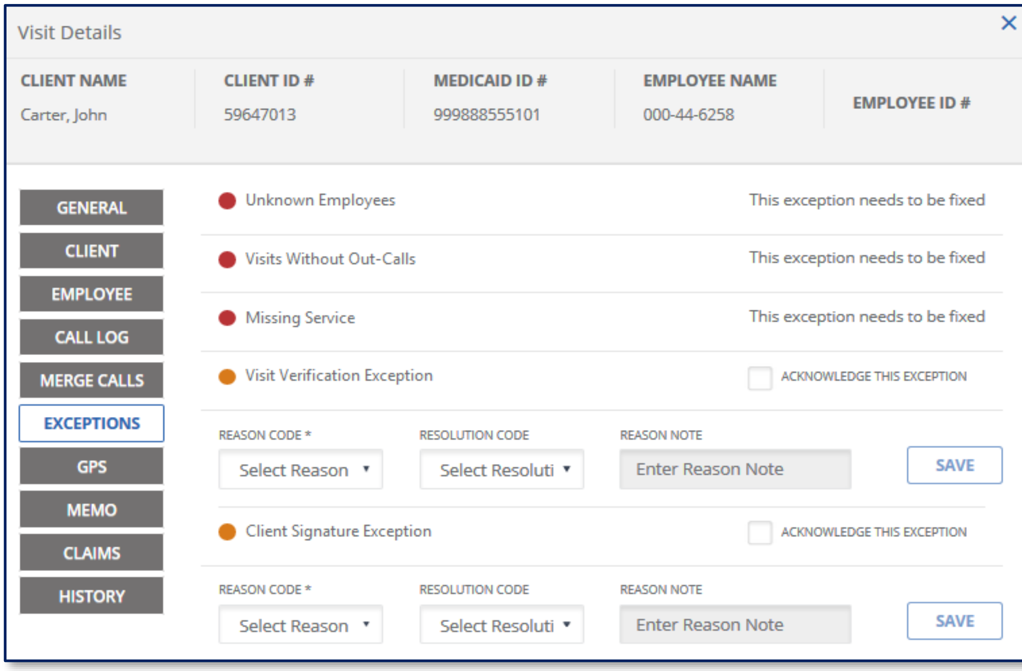
Identifying Exceptions

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.


Visit Details
CLIENT NAME
Carter, John
CLIENT ID #
59647013
MEDICAID ID #
999888555101
EMPLOYEE NAME
000-44-6258
EMPLOYEE ID #
GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY
Unknown Employees
This exception needs to be fixed
Visits Without Out-Calls
This exception needs to be fixed
Missing Service
This exception needs to be fixed
Visit Verification Exception
ACKNOWLEDGE THIS EXCEPTION
REASON CODE *
RESOLUTION CODE
REASON NOTE
Select Reason
Select Resoluti
Enter Reason Note
SAVE
Client Signature Exception
ACKNOWLEDGE THIS EXCEPTION
REASON CODE *
RESOLUTION CODE
REASON NOTE
Select Reason
Select Resoluti
Enter Reason Note
SAVE

Correcting Exceptions

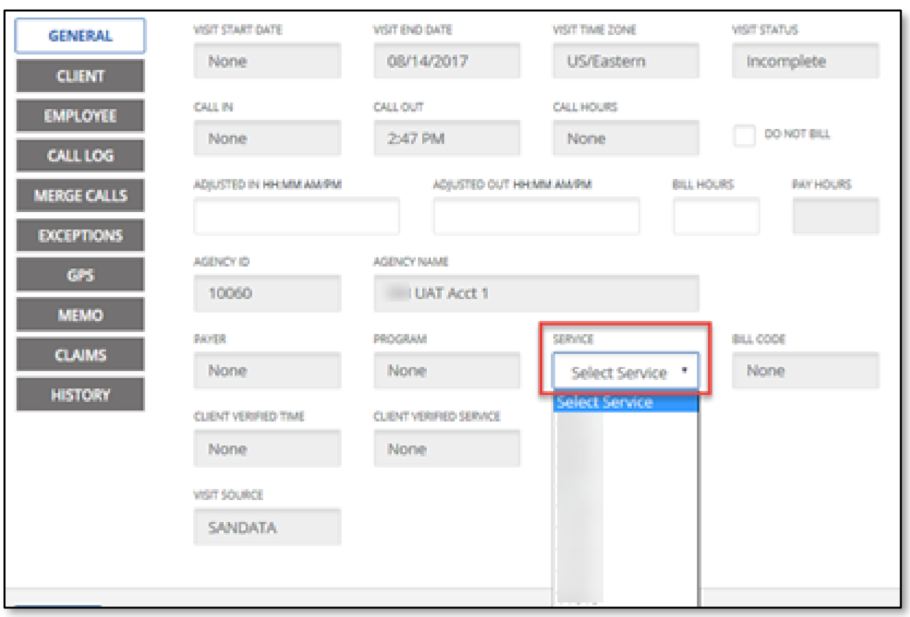
The condition causing the exceptions must be fixed or where it is not possible, acknowledged before a visit is matched to a claim. Every visit adjustment or correction requires the user to select a reason code, resolution code and in some cases, additional notes. The list of reason codes is configured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

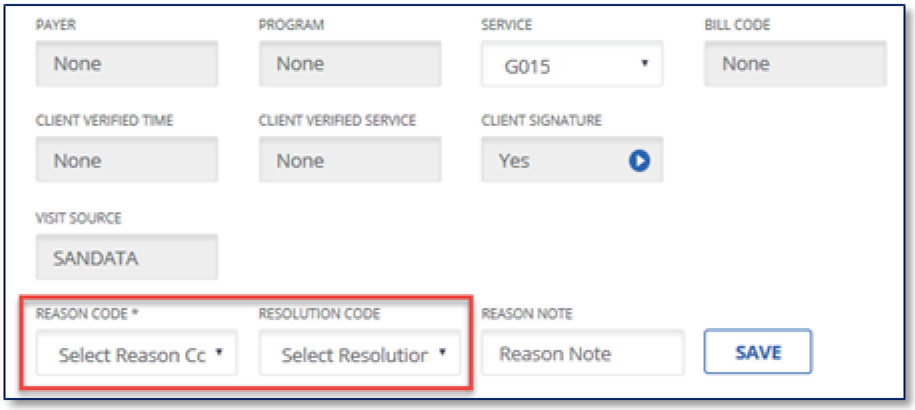
2. Select the correct service from the **SERVICE** field drop-down list.



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.

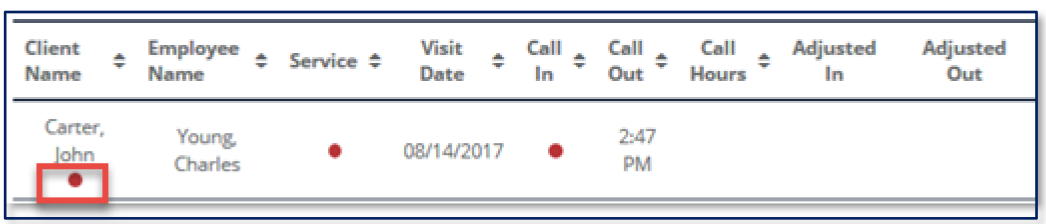


5. Click **SAVE**.

Client Signature Exception

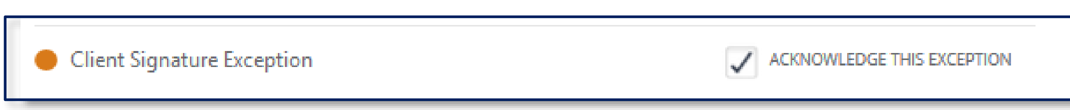
Identifies when the client signature or voice recording is not captured during the SMC call-out or the client voice recording is not captured during the Telephony call-out. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

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



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

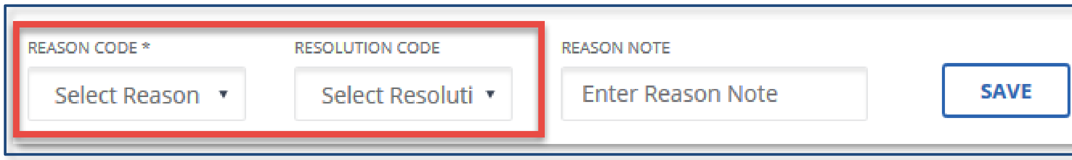
2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Client Signature Exception line.



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

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

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

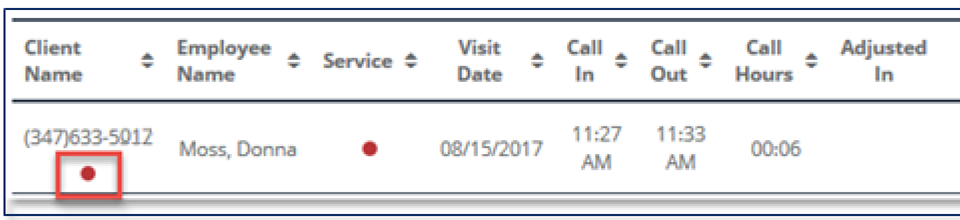


5. Click **SAVE**.

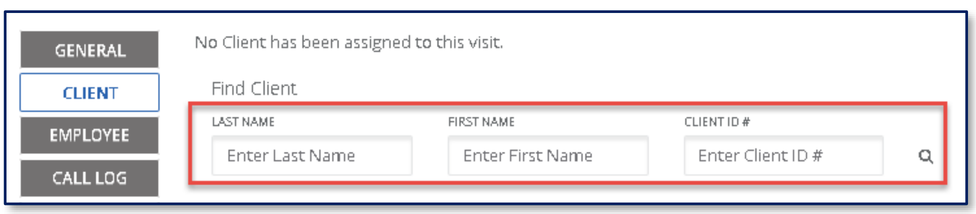
Unknown Client Exception

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

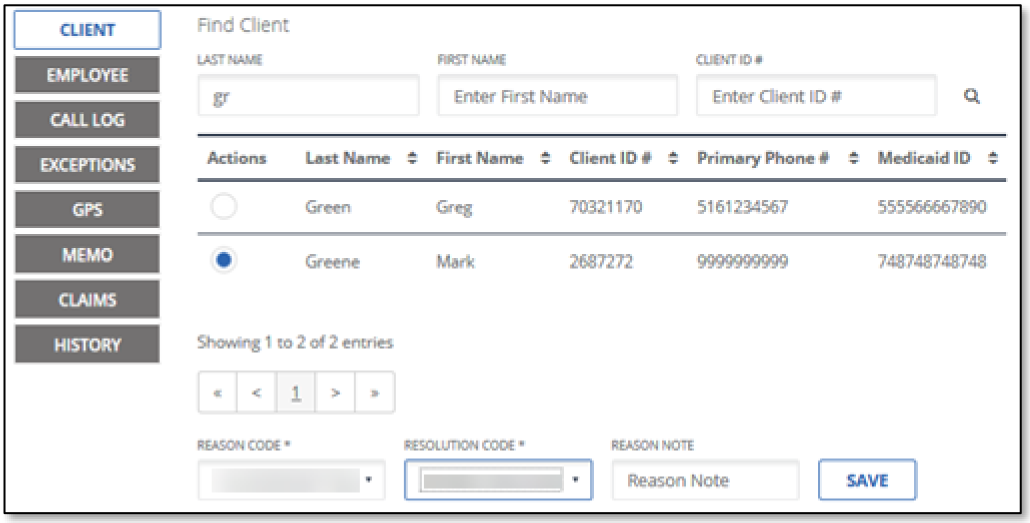
1. Click the exception indicator under the unknown ID under the **Client Name** column.



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**.

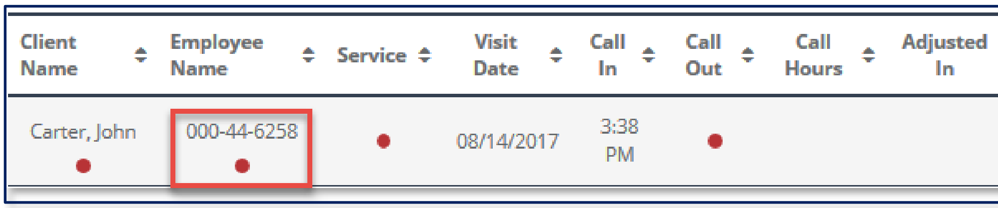
5. Select a **RESOLUTION CODE** from the list.

6. Click **SAVE**.

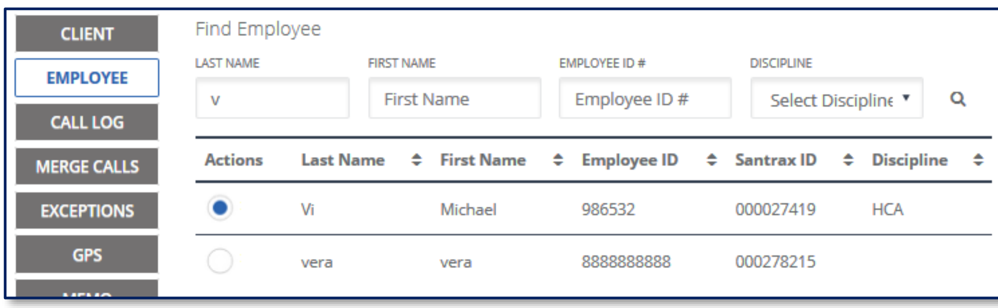
Unknown Employee Exception

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.



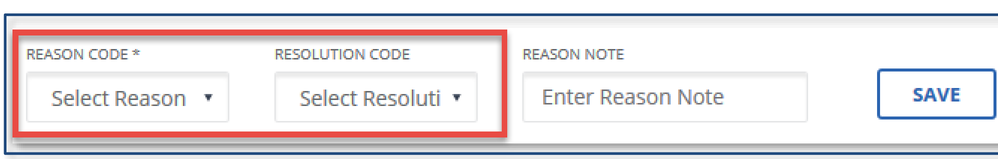
2. Use the search fields to search for the employee.
3. Select an employee from the search results.



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**.

<u>Unmatched Client Phone/ID</u>

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.

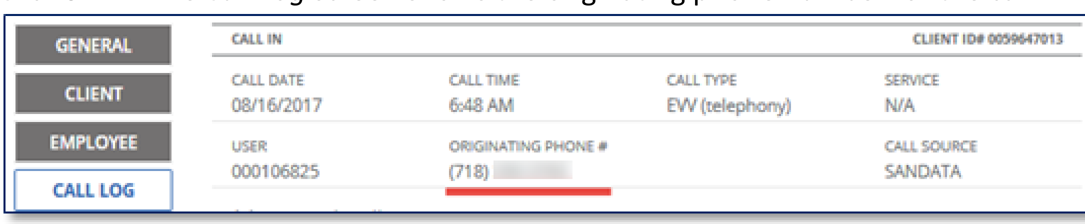
1. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Unmatched Client ID / Phone exception line.

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

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

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

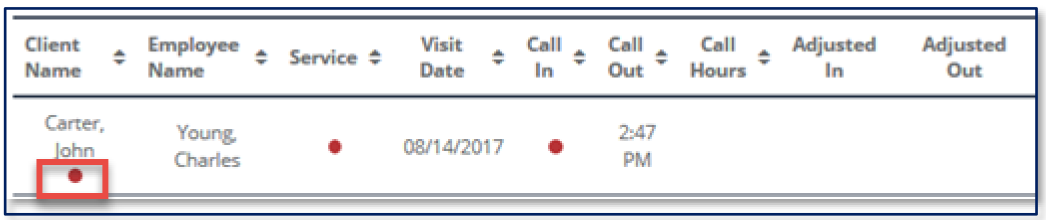
4. Click **SAVE**. The *Call Log* screen shows the originating phone number for the call.



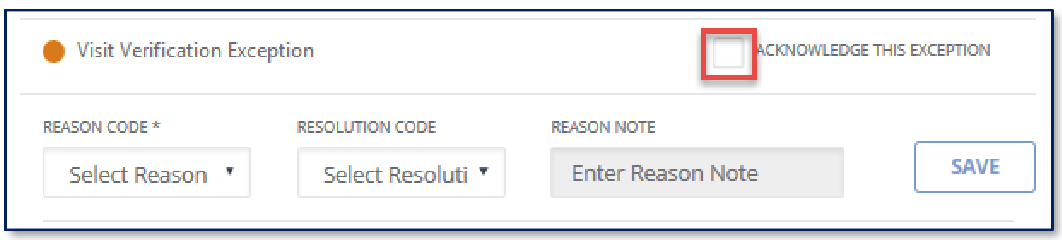
Visit Verification Exception

Identifies when the start and end time has not been verified by the client at the end of the visit, either by confirming during the SMC call-out or the client verifying time during the Telephony call-out. 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 **Client Name** column.



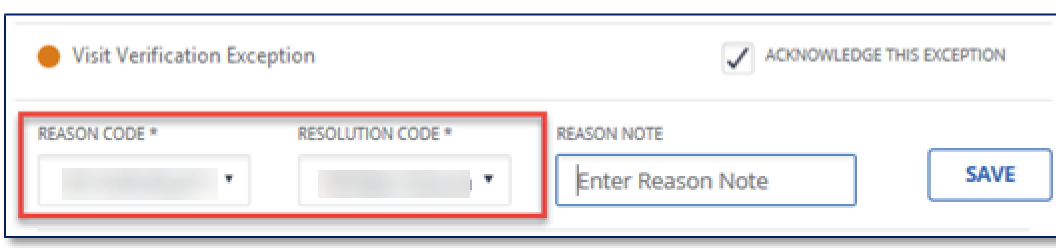
2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Visit Verification Exception line.



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

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

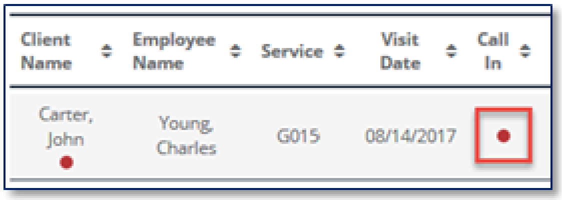
4. Select a **RESOLUTION CODE** from the list.

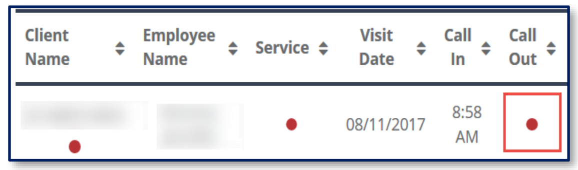


5. Click **SAVE**.

<u>Visit Without In-Call/Visit Without Out-Call</u>

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.



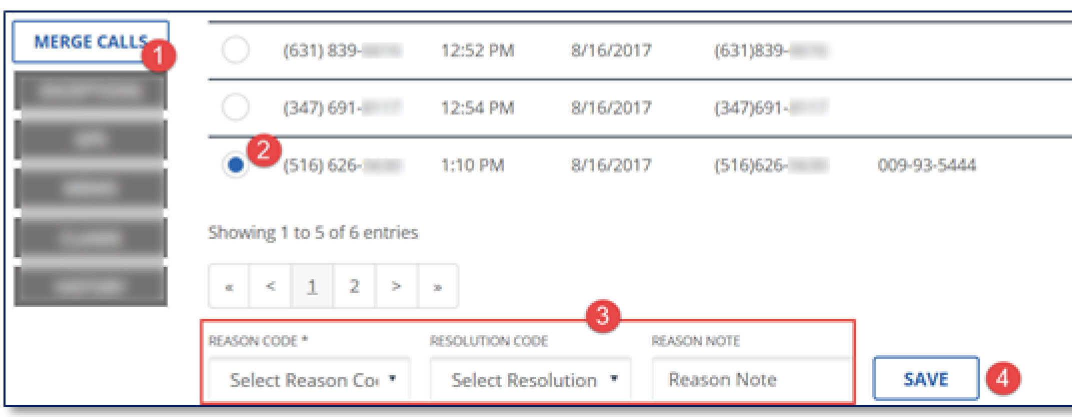


When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

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

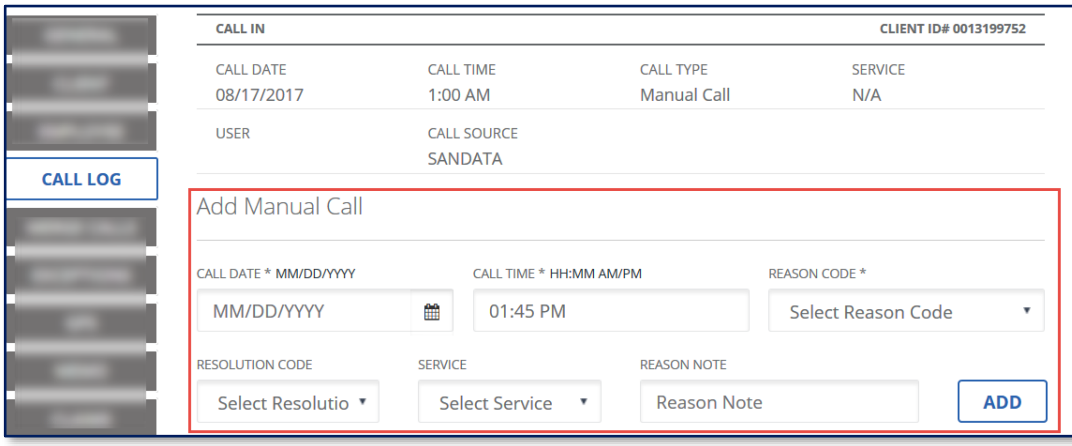
The *Merge Calls* screen only displays when there are calls the can be merged to the visit.



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.**

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.

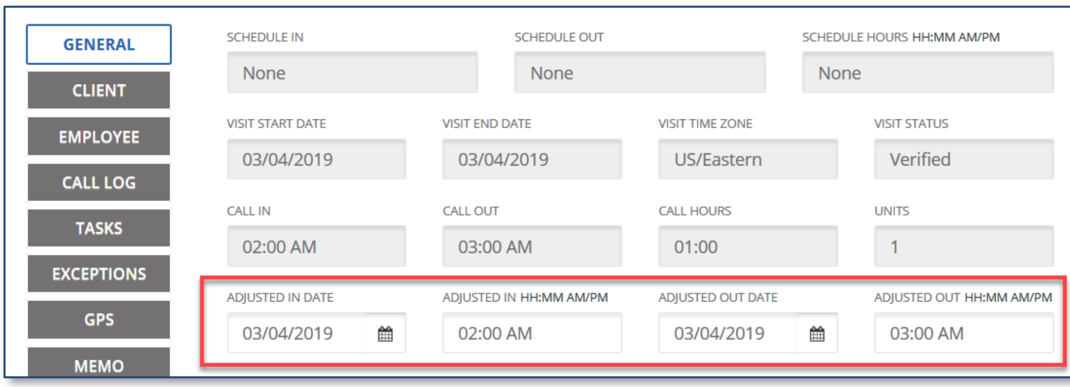


1. Click **CALL LOG**.
2. Enter the appropriate information into the fields.
3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

Users have the ability go back 365 days to add a manual call to a visit.

Entering Adjusted Times

If the call times for a visit do not reflect the actual start and/or end times of an employee's visit (i.e. the employee had to do something for the client immediately upon arriving and could not call-in or the client was using the telephone), a user can enter an **ADJUSTED IN** and/or **ADJUSTED OUT** on the General screen to update the visit duration. Sandata EVV will add the adjusted time entered and actual call time to recalculate the visit duration.



From the *Visit Details* screen:

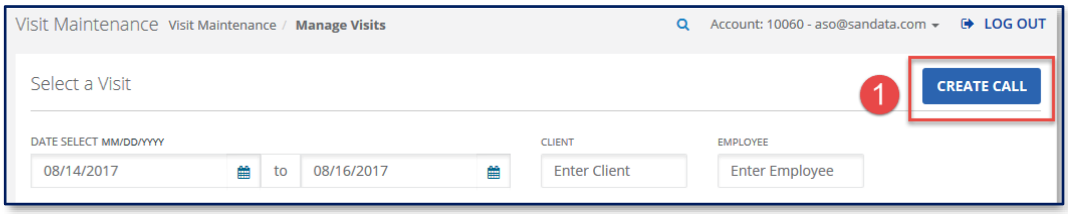
1. Click **GENERAL**.
2. Enter the appropriate information into the Adjusted Date(s) and/or Time(s) fields.
3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

Users have the ability go back 365 days to add adjusted times.

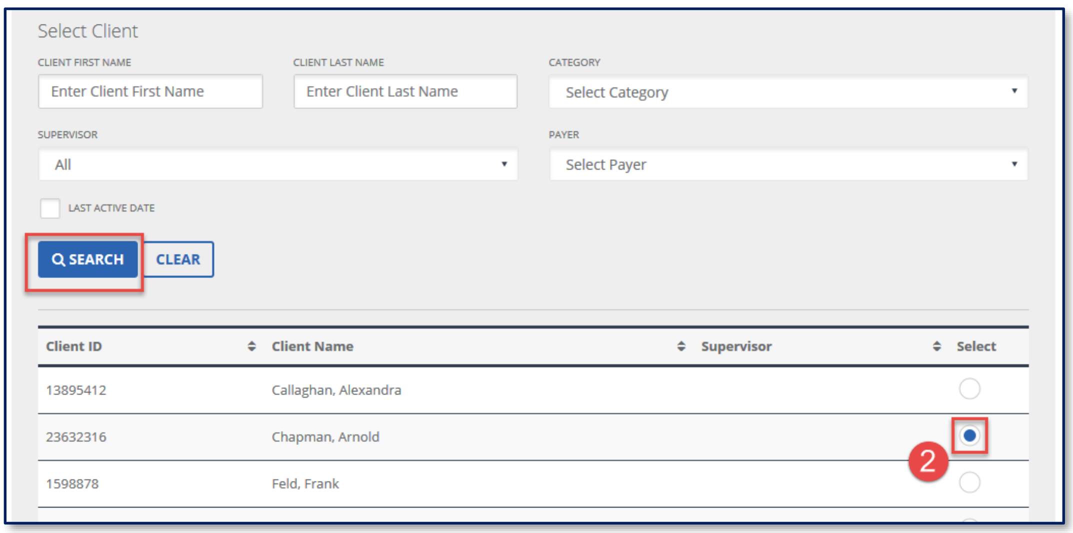
Create Call

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.

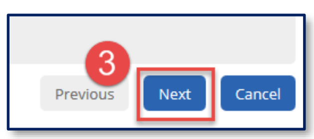
1. Click **CREATE CALL** on the *Visit Maintenance* screen.



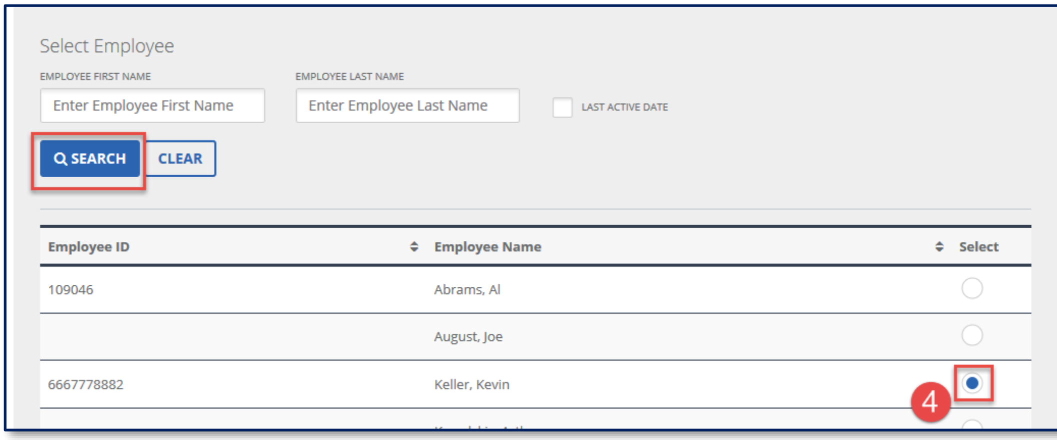
2. Search for and select a client.



3. Click **Next.**

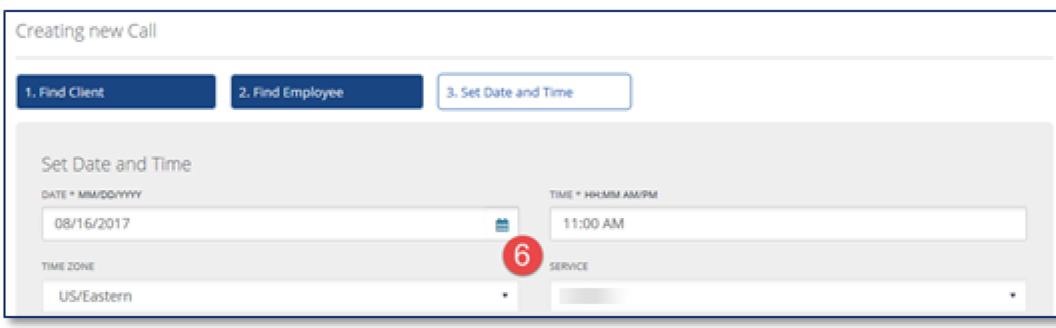


4. Search for and select an employee.

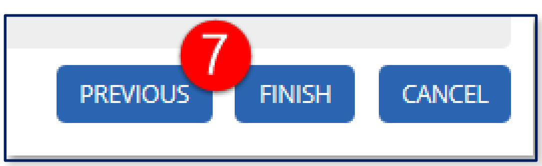


5. Click **Next.**

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



7. Click **FINISH**.



8 Group Visits

Module Time

45 minutes

This lesson shows how to use 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.

***Note** – Functionality may not apply based on program configuration and requirements.*

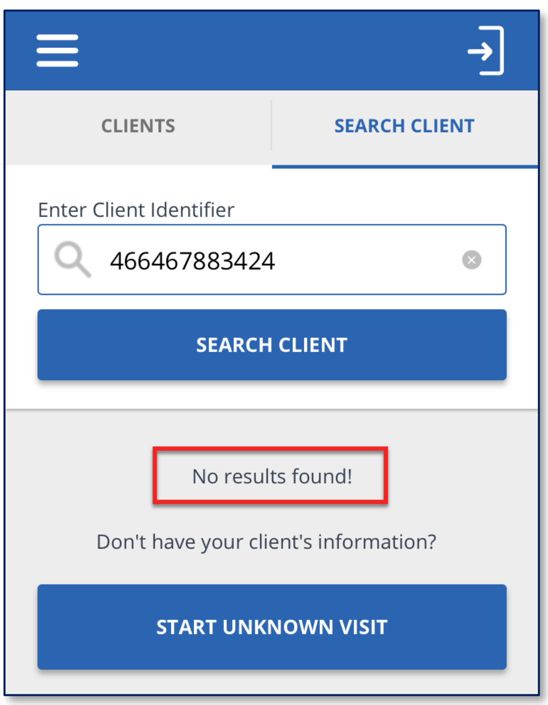
The Group Visit option allows one employee to call-in and call-out for one or more client visits at the same time, or multiple employees to call-in and call-out for one or more client visits at the same time. Group visits can be captured via SMC, TVV and EVV Visit Maintenance.

Sandata Mobile Connect (SMC)

Starting a new Group Visit

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

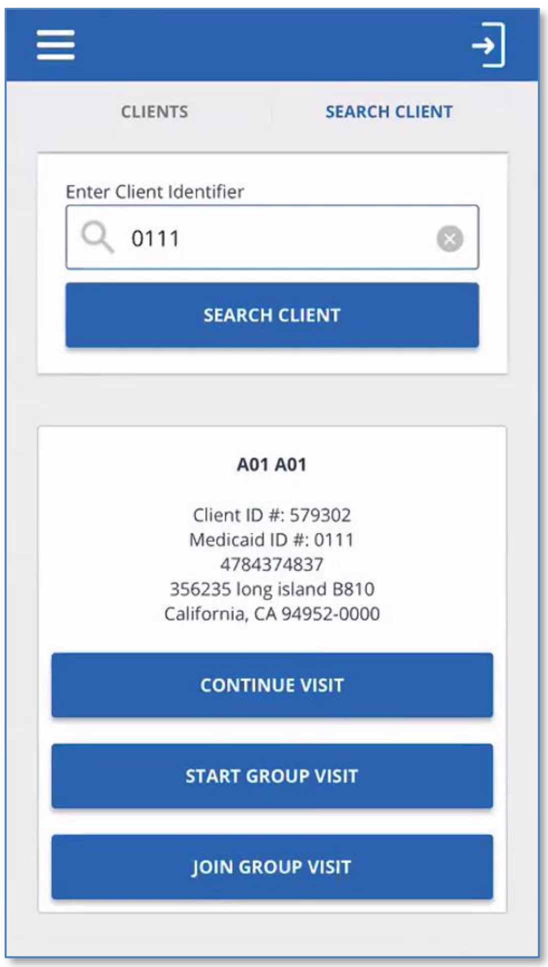
1. Locate the EVV Device or the employee's personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or the system generated client ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client,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



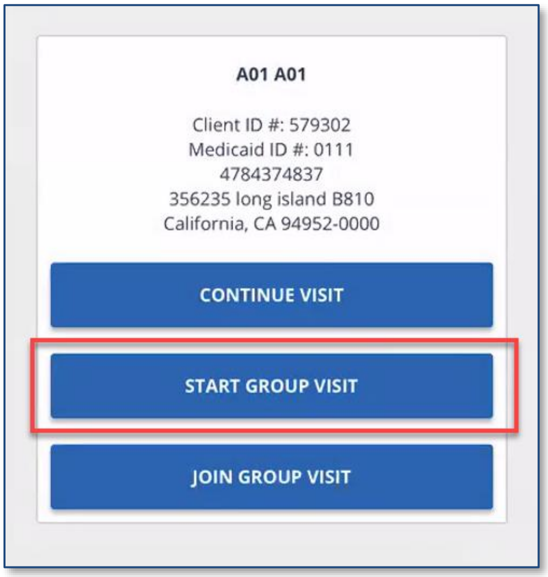
When the client details display, there are options to **CONTINUE VISIT**, **START GROUP VISIT** or **JOIN GROUP VISIT**.

- **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.

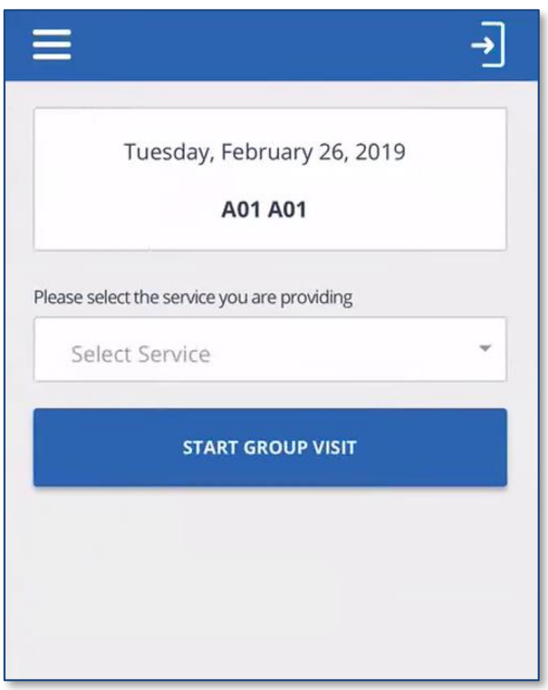
***Note**: *Join Group Visit option is not applicable to WI program.*



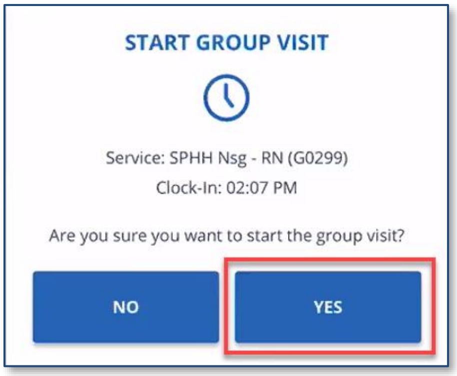
5. Tap **START GROUP VISIT.**



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



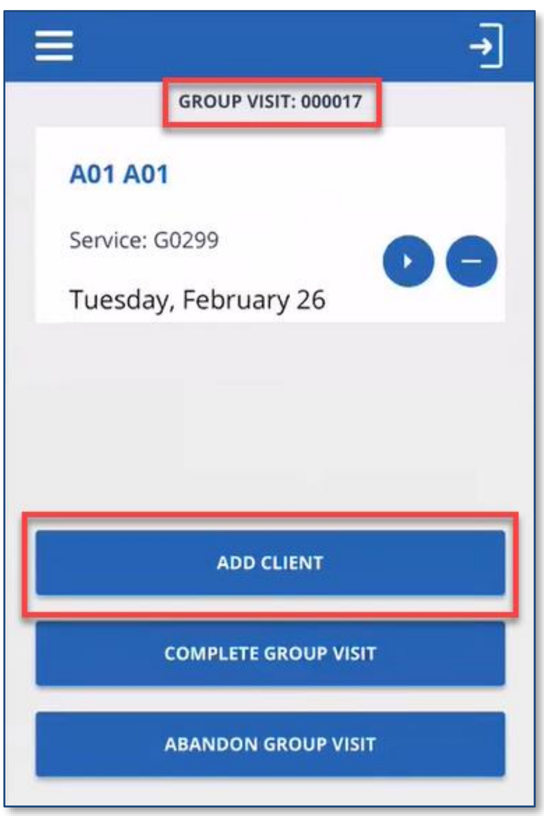
7. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



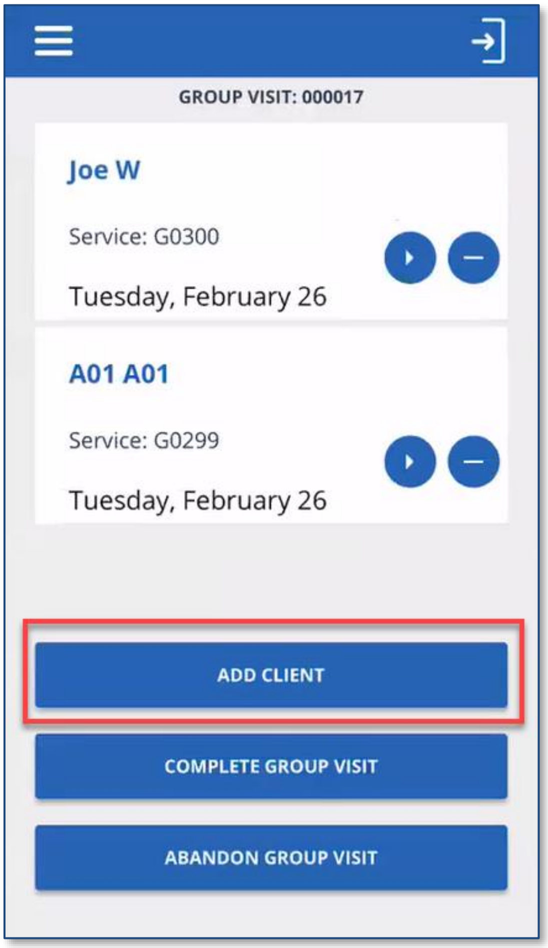
The visit is in progress and a Group Visit code is generated. This 6-digit code is used to identify all clients at a location who are receiving care from one or more employees from the same provider agency.

The employee may add additional clients they are providing care for during 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.



8. 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.

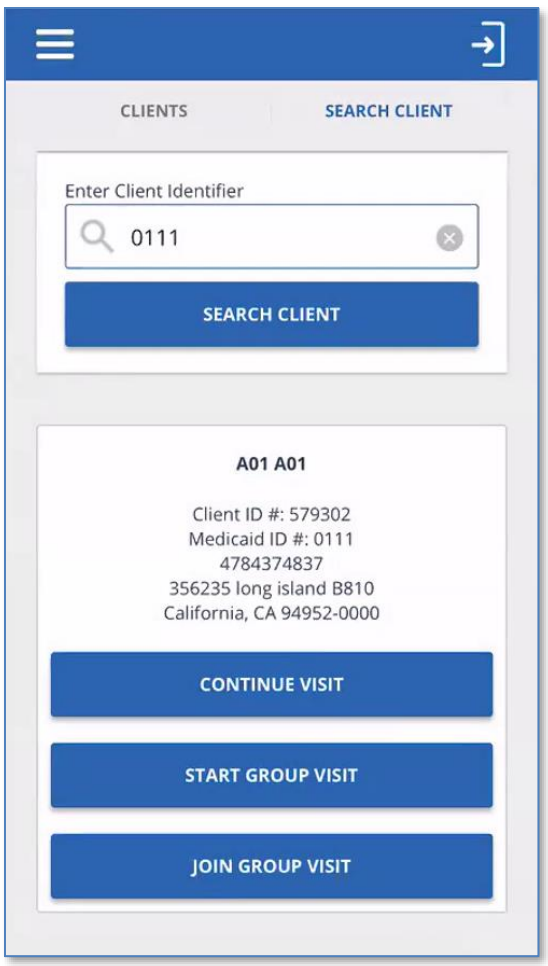
There is no limit to the number of known clients an employee can add to a group visit, or the number of employees who can join a group visit. However, an employee can only add one unknown client to a group visit.

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.

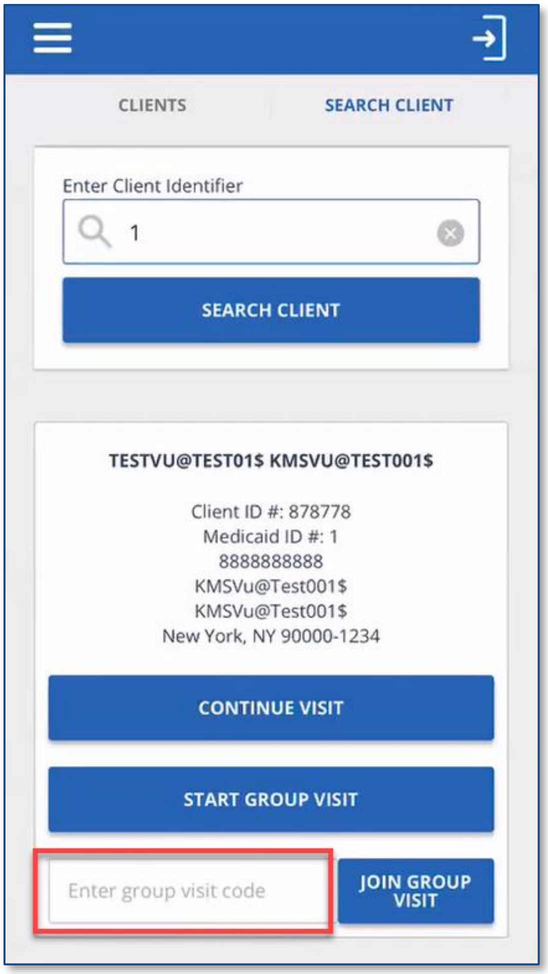
Joining a Group Visit

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

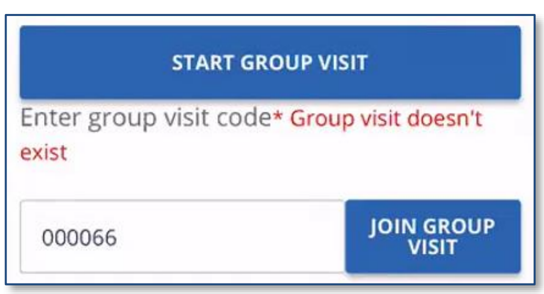
1. Locate the EVV Device or the employee's personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a "No results found" message displays).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



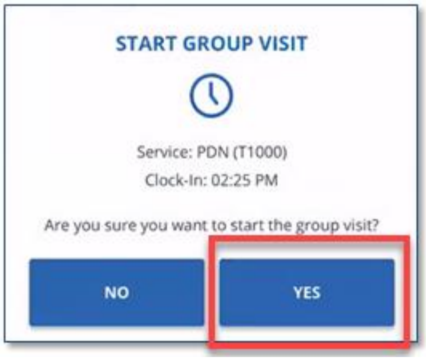
6. Enter the 6-digit group visit code and tap **JOIN GROUP VISIT**.



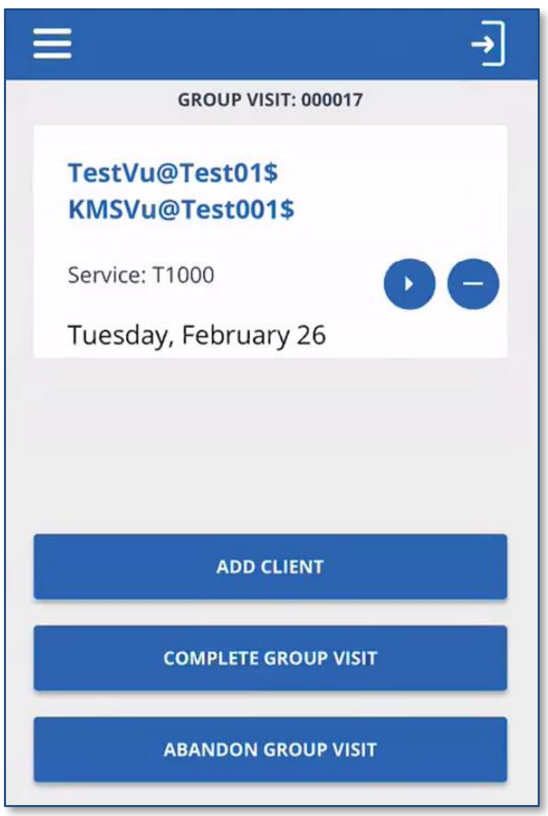
- The Group Visit code must be 6-digits in length.
- The code is only valid for use within the same agency.
- If an invalid code is entered, the following message is displayed.



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



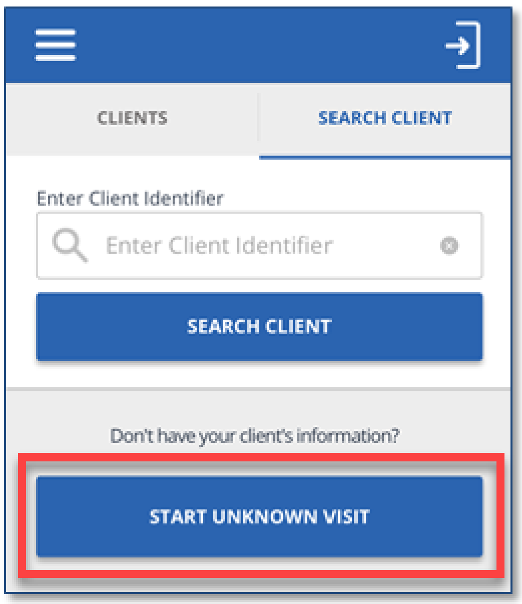
The client is added to the existing in progress Group Visit. The employee may add additional clients or log out of SMC.



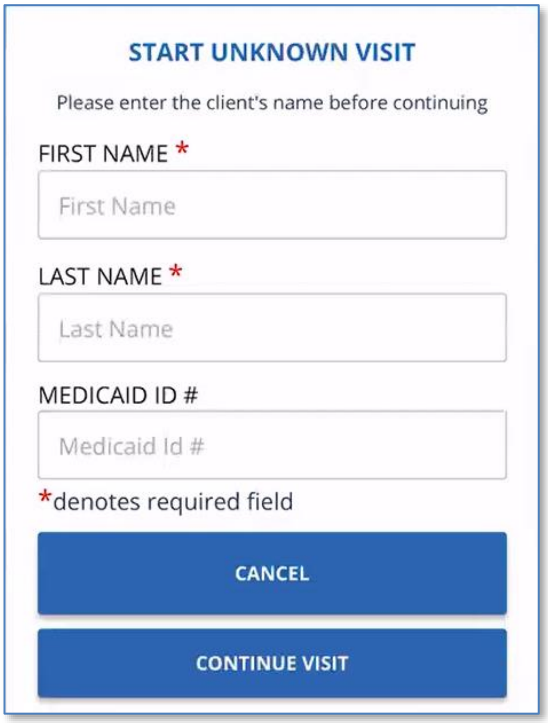
Adding an Unknown Client to a Group Visit

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.

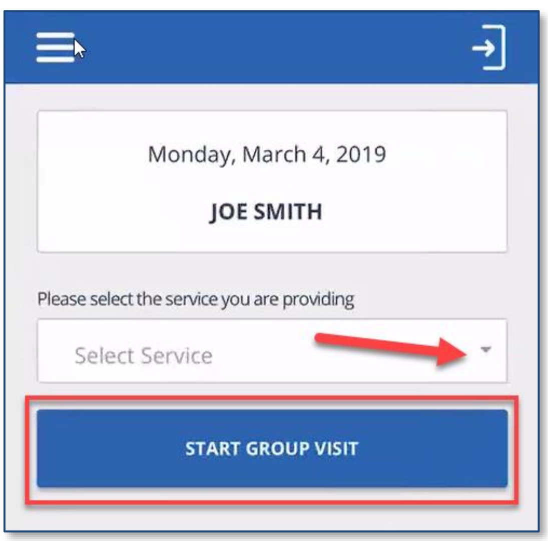
1. From the home screen, Tap **START UNKNOWN VISIT**.



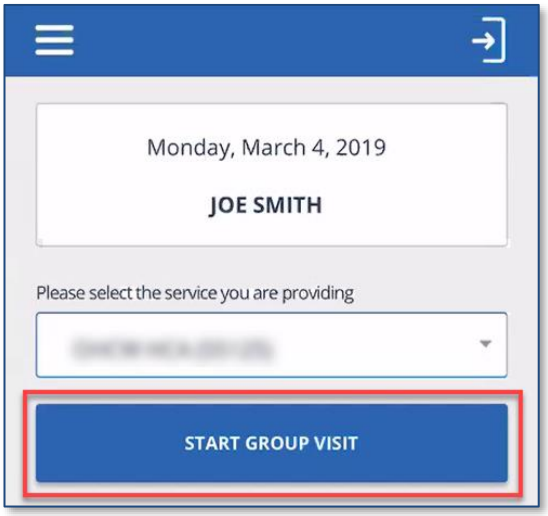
2. Enter the required information and tap **CONTINUE VISIT**.
   - **FIRST NAME** (Required)
   - **LAST NAME** (Required)
   - **MEDICAID ID** # (Optional – if available)



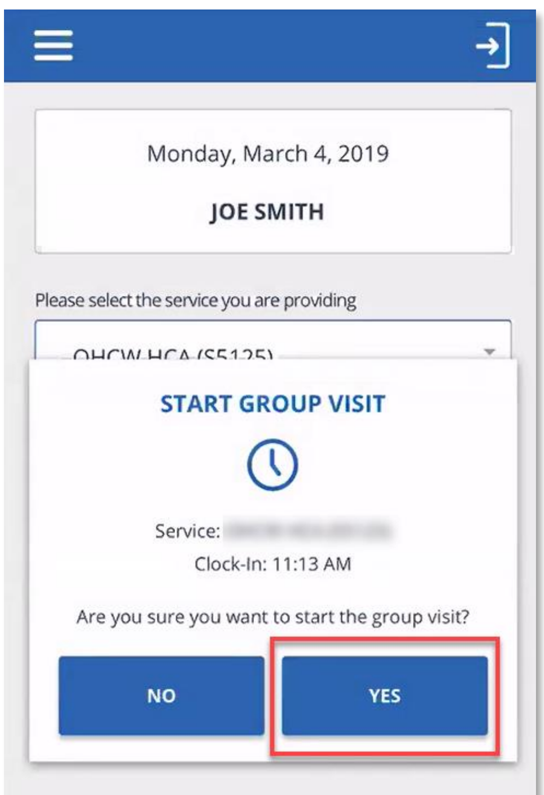
3. Select the Service from the drop-down list and tap **START GROUP VISIT**.



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



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



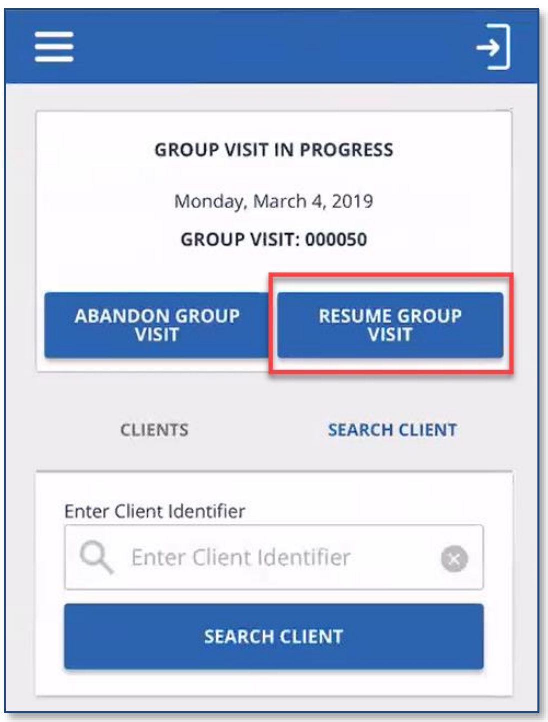
Completing a Group Visit

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

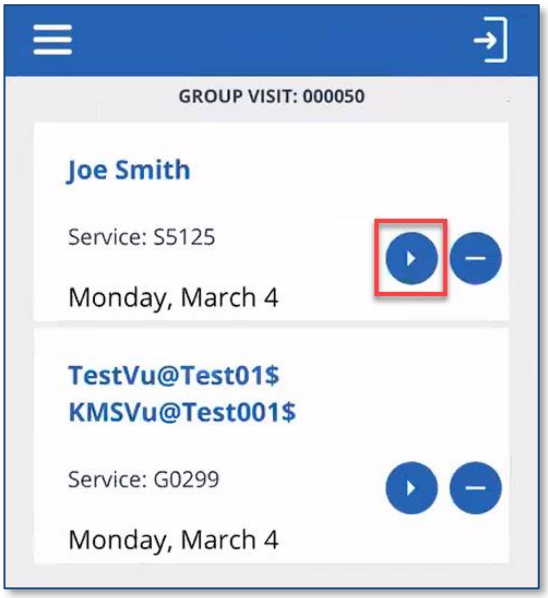
Completing all visits within a group at the same time requires that the visit process is the same for all the clients (e.g. all visits do not require client confirmation during the call-out process). If one or more clients have a different call-out process, the employee must complete the visits individually.

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.

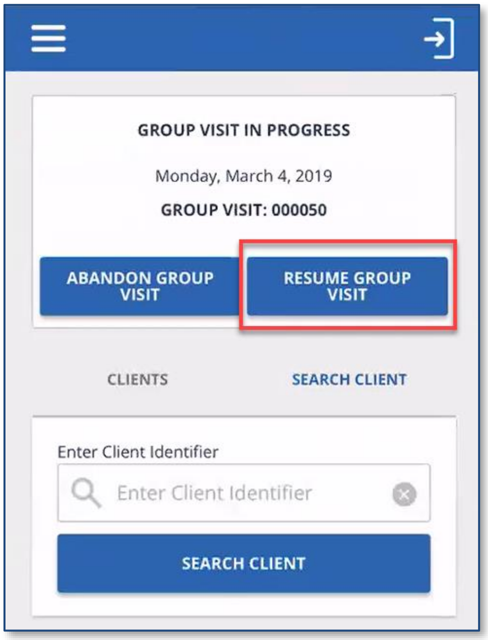


4. Complete the visit following the individual visit process.

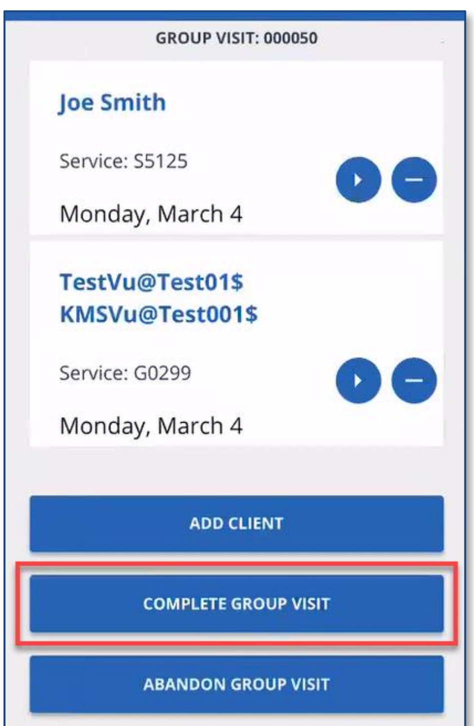
Tapping the 'dash' icon ( ) allows the employee to abandon the individual visit. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Completing all visits within a Group Visit Together

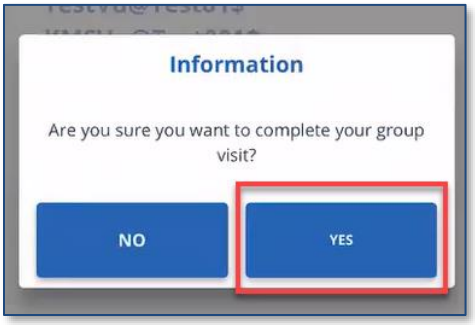
1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap **COMPLETE GROUP VISIT**.



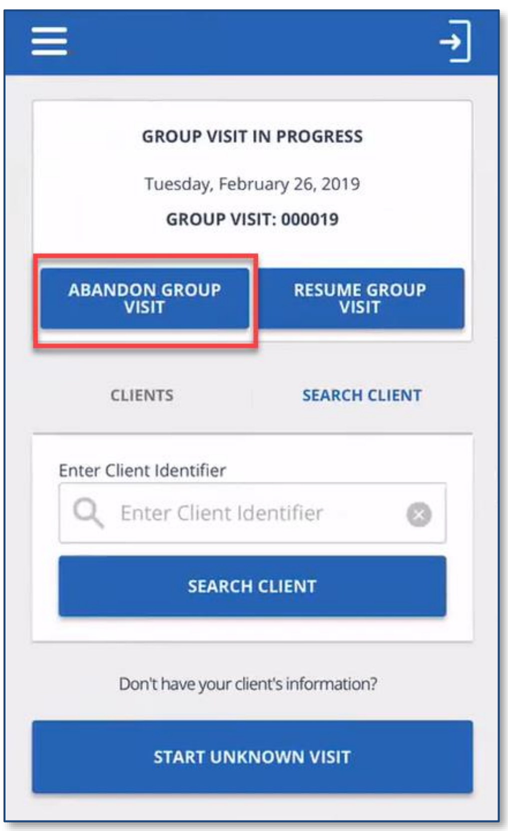
4. Tap **YES** to confirm completion of the group visit.



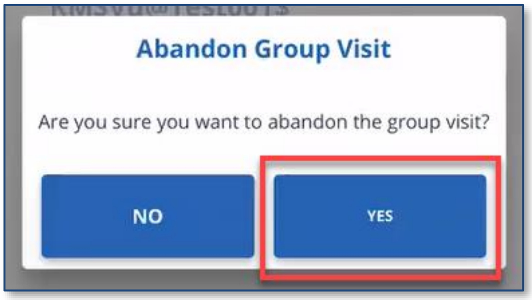
When completing a group visit, the employee is completing his or her client's visits.

Abandoning a Group Visit

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



3. 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

santrax®
ELECTRONIC VISIT VERIFICATION™

Call Reference Guide:

«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

____

Write your Santrax ID number above for easy reference.

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

Features:

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

Calling Instructions STX«ACCOUNT»

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.
- Your Client(s) ID.
- Group visit code if available.

1. **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 second toll-free number.

   Santrax will say: **"Welcome, please enter your Santrax ID."**

2. **Press the numbers of your Santrax ID on the touch tone phone.**

   Santrax will say: **"You entered (SANTRAX ID). Press (1) for Yes, (2) for No."**

3. **Press (1) to confirm your Santrax ID or press (2) to retry.**

   Santrax will say: **"Is this a group visit? Press (1) for Yes or (2) for No."**

4. **Press (1) for group visit.**

   Santrax will say: **"Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."**

(1) To start a new group visit:

5. **Press (1) to start a new group visit.**

   Santrax will say: **"You will *start* a new group visit with visit code (GROUP CODE)."**

6. **Continue to step ❼.**

(3) To join an existing group visit:

5. **Press (3) to join an existing group visit.**

   Santrax will say: **"Please enter the group visit code."**

6. **Press the numbers of the group visit code.**

   Santrax will say: **"You will *join* the group visit with visit code (GROUP CODE)."**

"… Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call."

Calling Instructions **STX«ACCOUNT»**

7. Press (1) to add a client.
   Santrax will say: **"Please select (1) to call in or (2) to call out."**
8. Press the (1) key to "Call In".
   Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
9. Press the numbers of the client's ID.
   Santrax will say: **"Please enter second client ID or hang up if done."**
10. **Repeat step 9 for each additional client beyond the first.**
   Or
   Hang up if done.

Calling Out: When leaving the client's home, make sure you have the following information:

- Your Santrax ID.
- The Service ID.
- The group visit code.
- The Client is available to verify the visit.

11. **Follow steps 1 thru 4 to and then continue.**
   Santrax will say: **"Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."**
12. **Press (2) to continue your group visit.**
   Santrax will say: **"Please enter the group visit code."**
13. **Press the numbers of the group visit code.**
   Santrax will say: **"You will continue group visit with visit code (GROUP CODE). Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call."**
   NOTE: If you made a mistake and need to discard all data you have previously entered for all visits in this group, press (4) to abandon the whole group visit.
14. **Press the (2) key to complete the visit for a client.**
   Santrax will say: **"Please select (1) to call in or (2) to call out."**

Calling Instructions **STX«ACCOUNT»**

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

Group Visit Call Process – Multi-Language Line

Call-In	
1	Dial the toll-free number.
	Santrax will prompt for to select a language. Each prompt will be heard in its respective language followed by a selection number. (i.e. "For English, press 1; for Spanish, press 2, etc.) **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: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to an employee record, Santrax will say: "*You have entered an invalid Santrax ID, please try again."*
4	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
5	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."*
6	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."*
7	Press 1 to add a client.
	Santrax will say*: "Press 1 to call-in or 2 to call-out."*
8	Press 1 to call-in.
	Santrax will say*: "Received at [Time]. Please enter first client ID or hang up if done."*
9	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.
10	Hang up.

Call-Out	
1	Dial the toll-free number.
	Santrax will prompt for to select a language. Each prompt will be heard in its respective language followed by a selection number. (i.e. "For English, press 1; for Spanish, press 2, etc.) **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: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."* If the Santrax ID entered does not match to an employee record, Santrax will say: "*You have entered an invalid Santrax ID, please try again."*
4	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
5	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."*
6	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."*
7	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 the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."*
8	Press 2 to complete the visit.
	Santrax will say: *"Please select 1 to call-in or 2 to call out."*
9	Press 2 to call-out.
	Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."
10	Enter the client ID number.
	Santrax will say: "Please enter the Service ID."

11	Press the three-digit ID of the care performed (Service IDs are listed on the back of the Call Reference Guide).
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."
12	Press the 1 to accept.
	After the service, Santrax will say: "To record the client's voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate. Press 1 to record client's voice (hand phone to client): *Santrax will say: "Please say your name and today's date."* The client will say their name and the date. *Santrax will say: "In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press one to confirm, two to deny."* Client will press appropriate choice. *Santrax will say: "The service performed was [service]. Press one to confirm, two to deny."* Client will press appropriate choice. *Santrax will say: "Enter second client ID or hang up if done."* Enter the next client ID to complete from the group visit. **(repeat steps 10 – 12 for each additional client in the group)** Hang up when the last client has been entered.

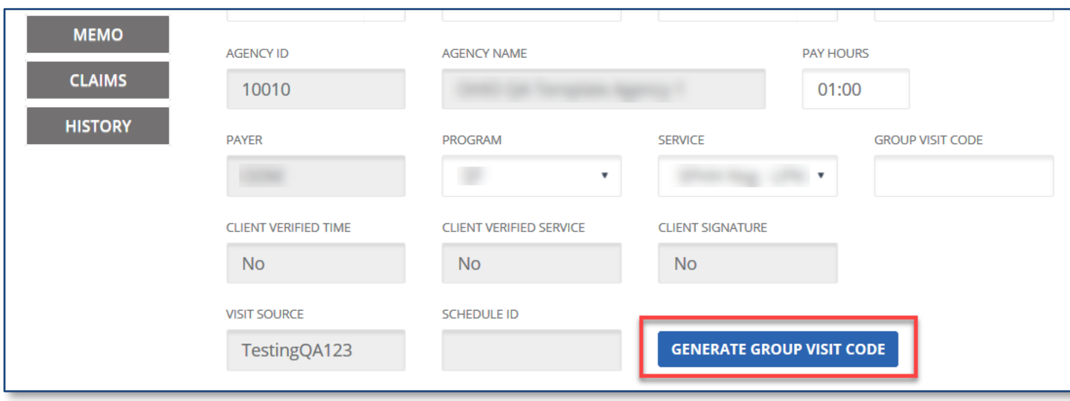
Visit Maintenance - Generating/Editing Group Visit Codes

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

Adding a Code

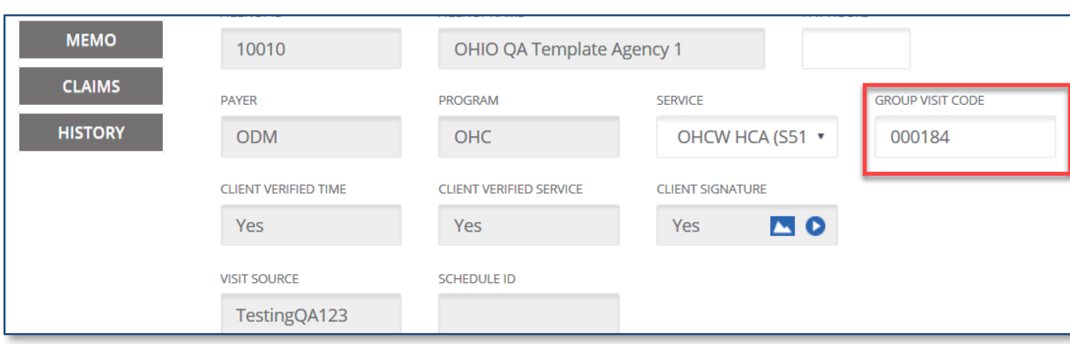
If a visit that took place should have been captured as a group visit, a user can create a group visit code after the fact in Visit Maintenance. The group visit code can be generated from the *General* screen of the Visit Details by clicking the **GENERATE GROUP VISIT** button. This creates a 6-digit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

To apply a generated group visit code to other visits, use the search filters to find the visits. Once the visit is found, click on the visit line to view the *General* screen and type the code into the **GROUP VISIT CODE** field of the visit and save the record.



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.

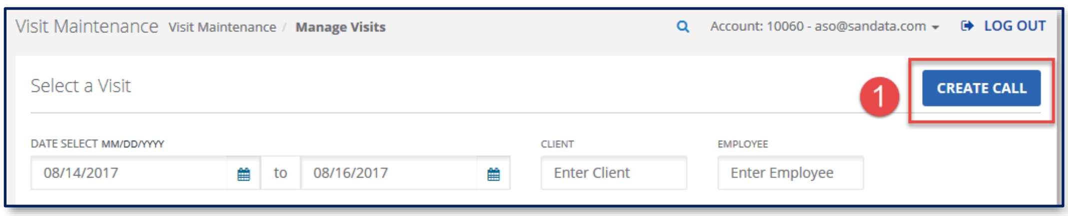


If the code entered is not a valid group visit code, an invalid group visit code message displays.

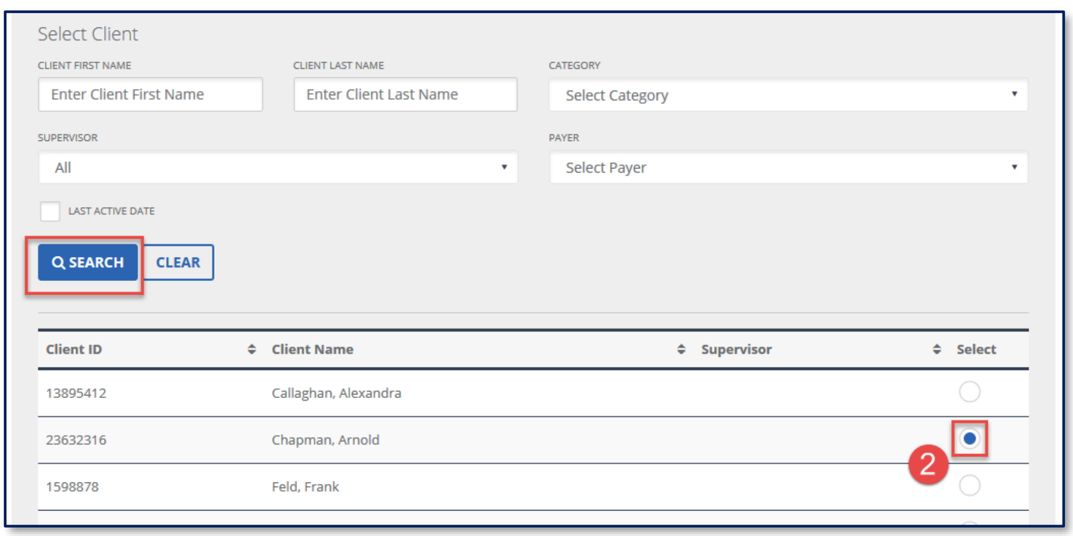
Create Call

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.

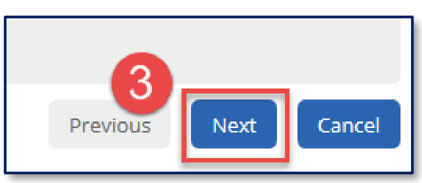
1. Click **CREATE CALL** on the *Visit Maintenance* screen.



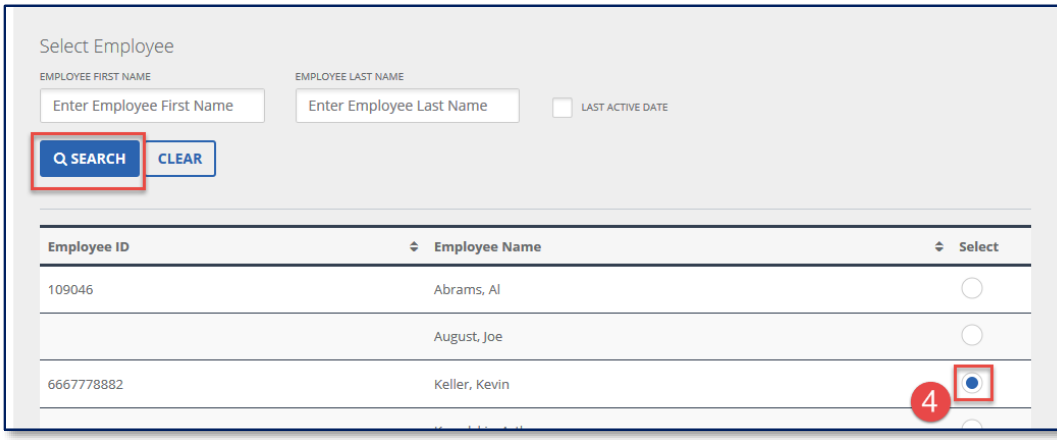
2. Search for and select a client.



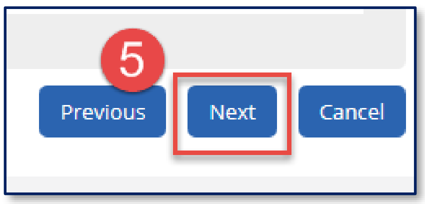
3. Click **Next.**



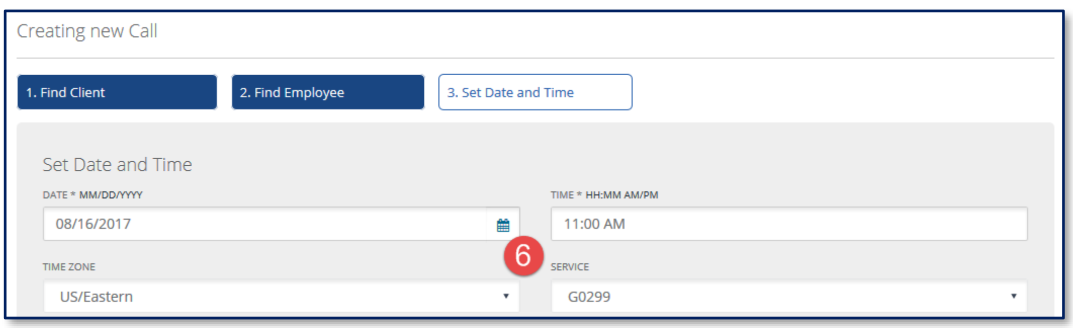
4. Search for and select an employee.



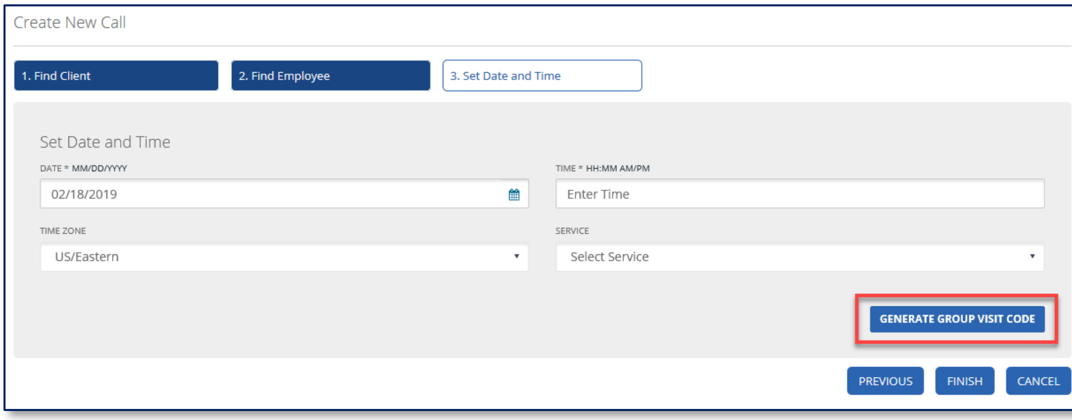
5. Click **Next.**

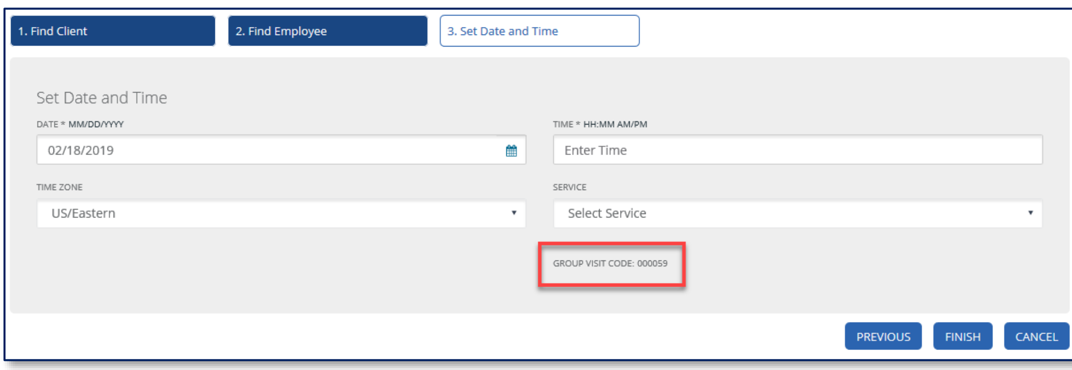


6. Enter the **DATE***, **TIME*** and **SERVICE** details.

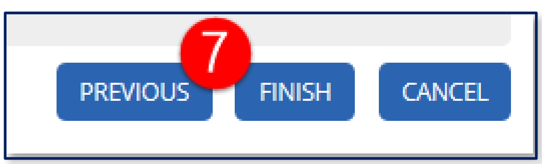


If creating a group visit call, click the **GENERATE GROUP VISIT CODE** button to obtain a group visit number.





7. Click **FINISH**.



9 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.

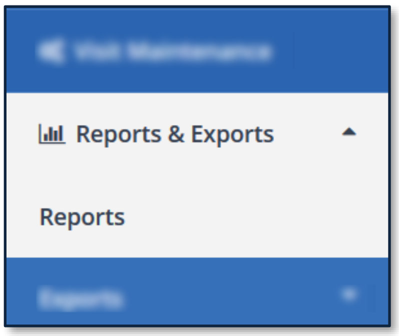
Introduction

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

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

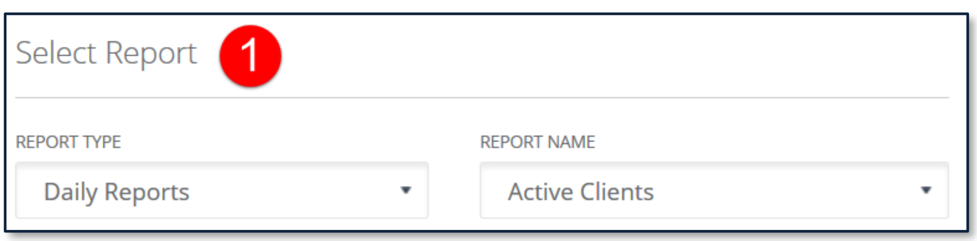


Reports – Main Window Elements

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

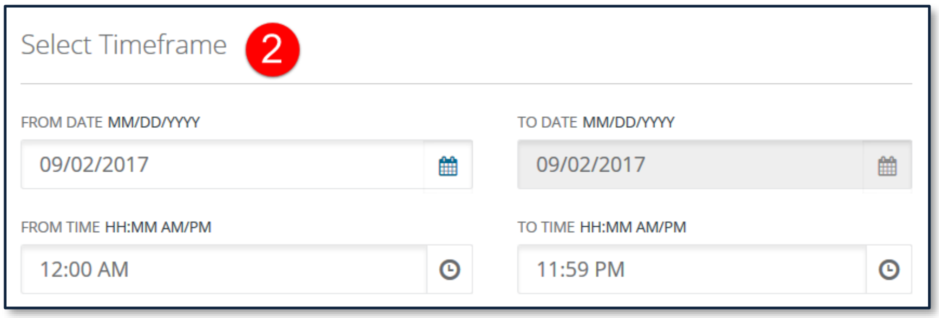
   TIP: The reports listed in the **REPORT NAME** field change based on the **REPORT TYPE** category selected.

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



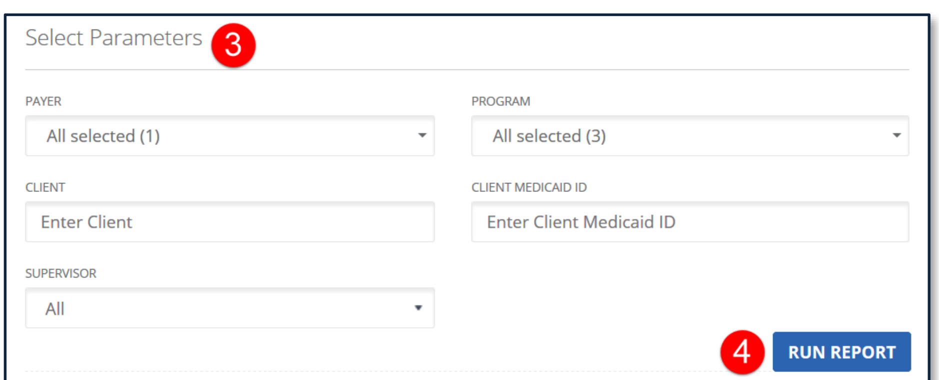
2. **Select Timeframe** Select the time and/or date range of the reports being run.

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



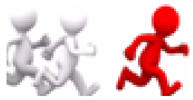
3. **Select Parameters** Various search options are made available for the user to further limit the report results. Depending on the report selected, the parameters can differ. Common filters include, but are not limited to:

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.

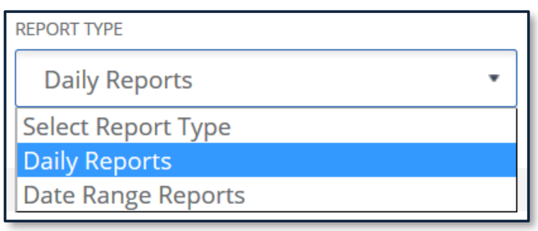
Running a report

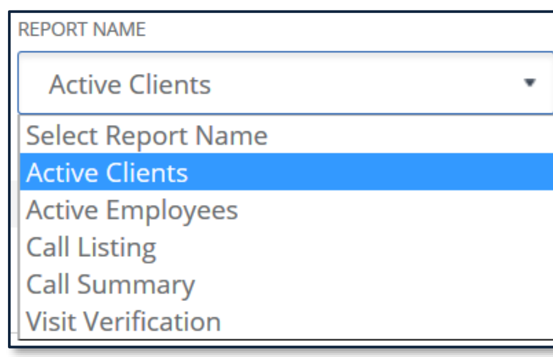


Follow along with the instructor to run a report.

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

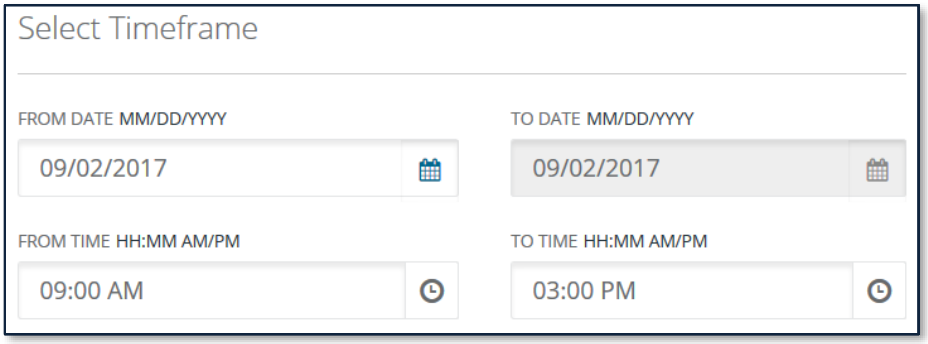
2. Select the **REPORT TYPE** and **REPORT NAME**.





TIP Available reports differ depending upon which report type is selected.

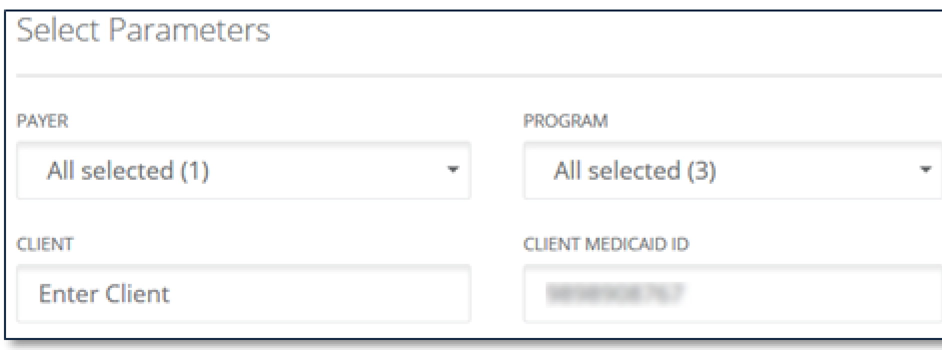
3. Enter **Select Timeframe** information.



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**.



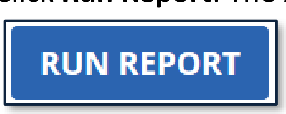
If there is more than one Payer, select from the drop-down list. Neither the **PROGRAM** nor **SUPERVISOR** fields are necessary to run the report. **CLIENT** or **CLIENT MEDICAID ID** narrows the results to just that client.

TIP

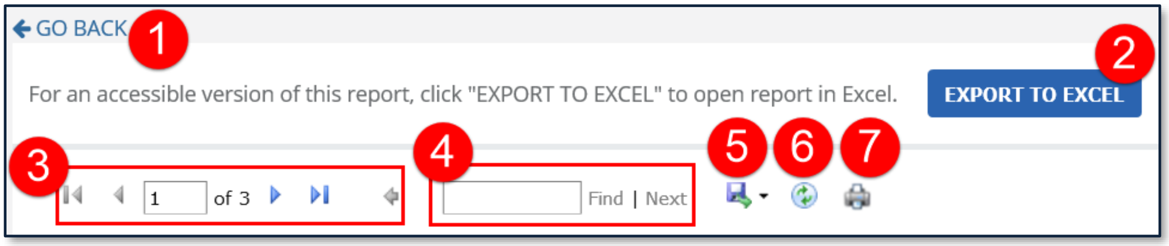
Parameters vary based on the report selected.

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**.

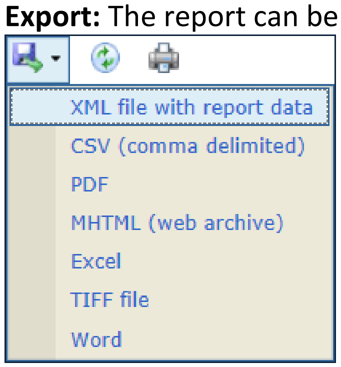
5. Click **Run Report**. The *Preview Report* screen opens.



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:



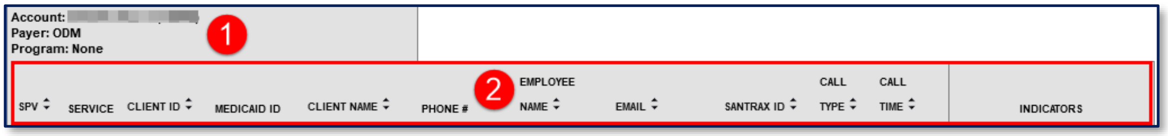
TIP

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

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

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

Sorting a Report



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

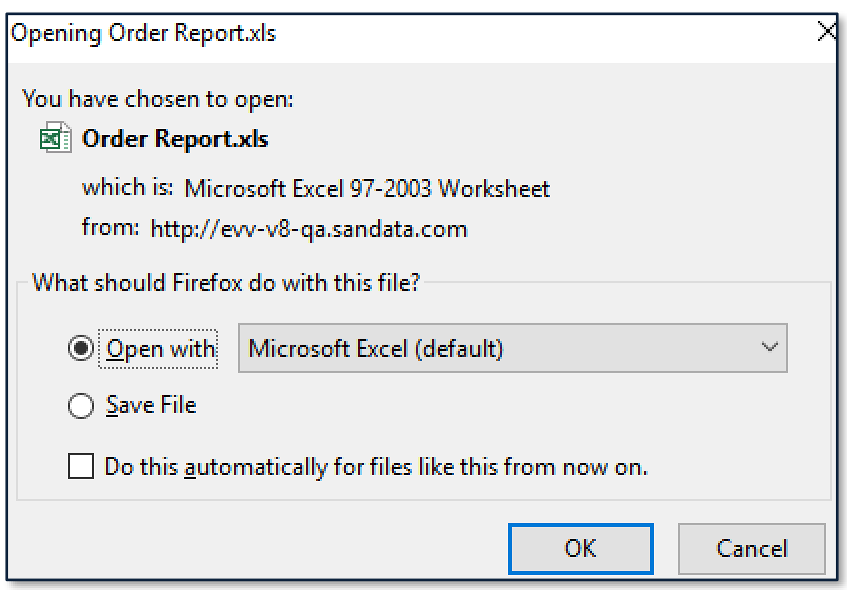
If the column header has no arrow ( ) next to it, the column cannot be sorted.

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

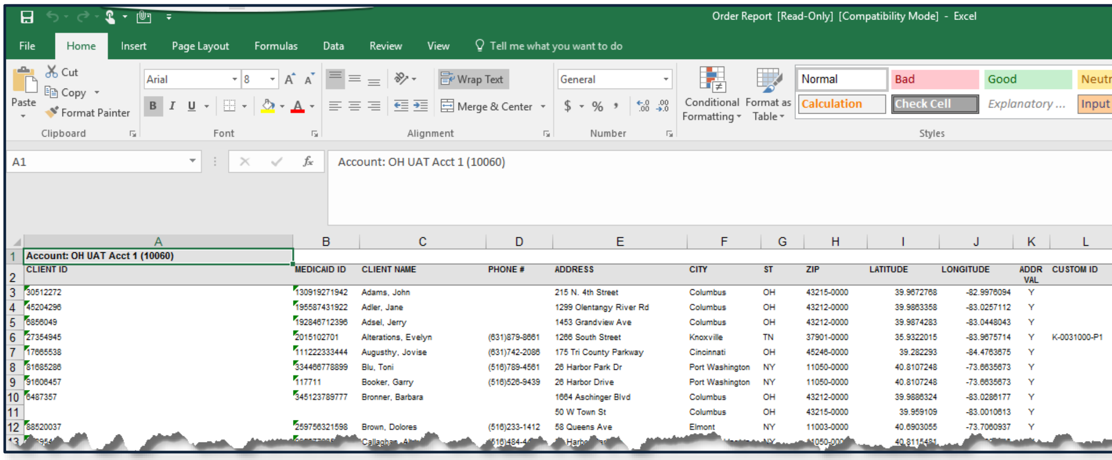
Export a Report

Follow along with the instructor to export a report.

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



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



On Your Own: Run the Client Summary Report

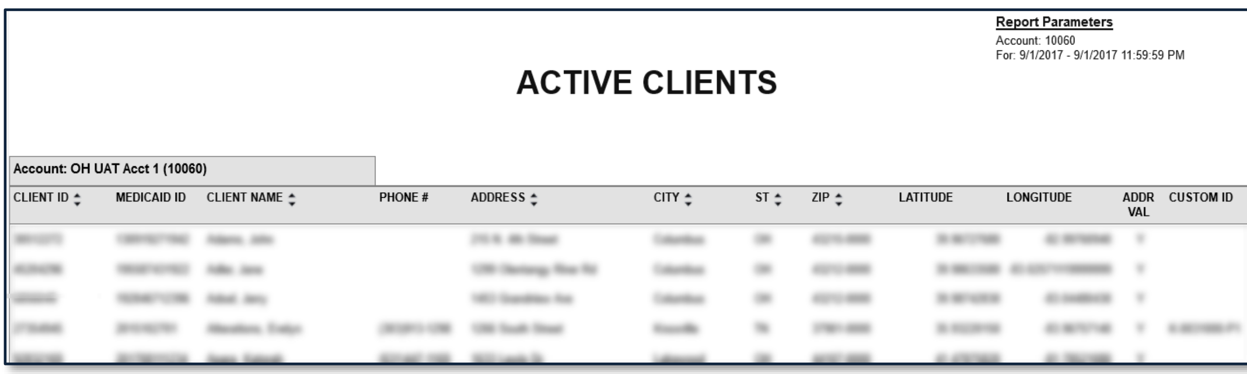
Sample Available Reports

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

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

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



- **Active 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).

- **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 calls that require editing, verification or exception handling.

Report Parameters
Account:
For: 8/24/2017 - 8/24/2017 11:59:59 PM

Call Listing

Account:
Payer: None
Program: None

SPV	SERVICE	CLIENT ID	MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMAIL	SANTRAX ID	CALL TYPE	CALL TIME	INDICATORS
											G
											G

Grand Total of Actual Calls: 2

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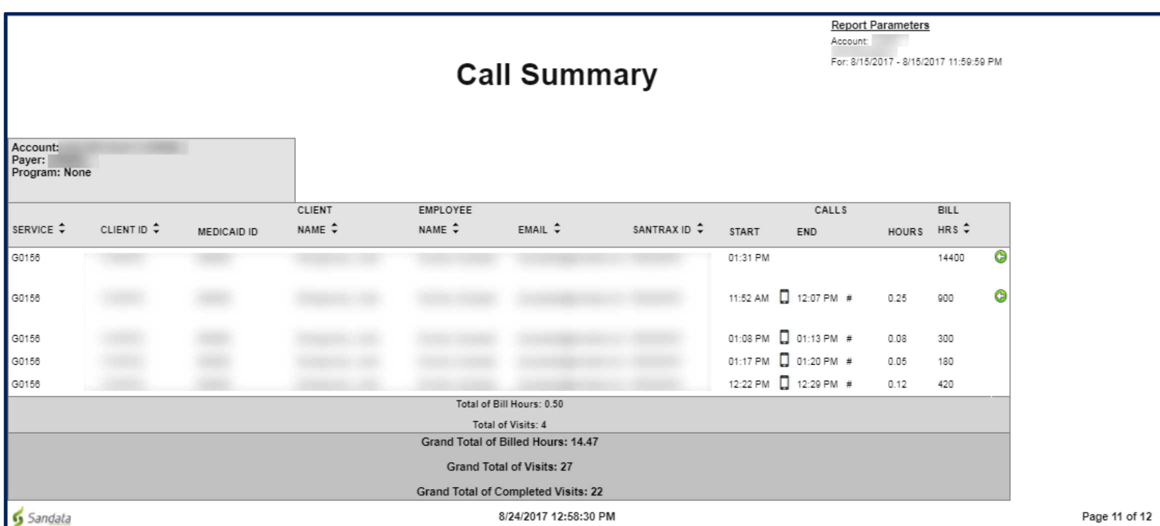
- **Call Summary Report:** This report pairs the Start and End calls and calculates the hours worked.

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.



Report Parameters
Account:
For: 8/15/2017 - 8/15/2017 11:59:59 PM

Call Summary

Account:
Payer:
Program: None

SERVICE	CLIENT ID	MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMAIL	SANTRAX ID	CALLS START	CALLS END	HOURS	BILL HRS
G0156							01:31 PM			14400
G0156							11:52 AM	12:07 PM #	0.25	900
G0156							01:08 PM	01:13 PM #	0.08	300
G0156							01:17 PM	01:20 PM #	0.05	180
G0156							12:22 PM	12:29 PM #	0.12	420

Total of Bill Hours: 0.50
Total of Visits: 4
Grand Total of Billed Hours: 14.47
Grand Total of Visits: 27
Grand Total of Completed Visits: 22

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

Use this report to view all information about a visit.

Report Parameters
Account:
For: 8/15/2017

Visit Verification Report

Account:
Payer:
Program: None
Service: None

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

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

- **Expiring Authorizations Report**: This report allows you to review all authorizations that are ending on a given date.

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

Report Parameters
Account: 60110
For: 04/01/2019 12:00 AM - 06/12/2019 11:59 PM
Payer: All
Program: All

Expiring Authorizations

CLIENT	PROGRAM	MEDICAID ID	SOC	PRIOR AUTH END DATE	SERVICE ID	EVENT ID	REF NUM
Dyer, Mike G.	P1	123456789	2/4/2019	4/30/2019	S9124	DEF	55555
Total: 1							

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- **Clients/Members Without Authorizations Report**: This report allows you to review all clients that are missing authorizations or have expired authorizations within the specified date. The report details include the client name, Medicaid Payor ID and authorization expiration date.

Use this report to review all clients who are missing authorizations or who have authorizations that have expired.

Report Parameters
Account: [illegible]
As of Date: 4/1/2020

Members Without Authorizations - Agency

Account: [illegible] HOME S ([illegible])

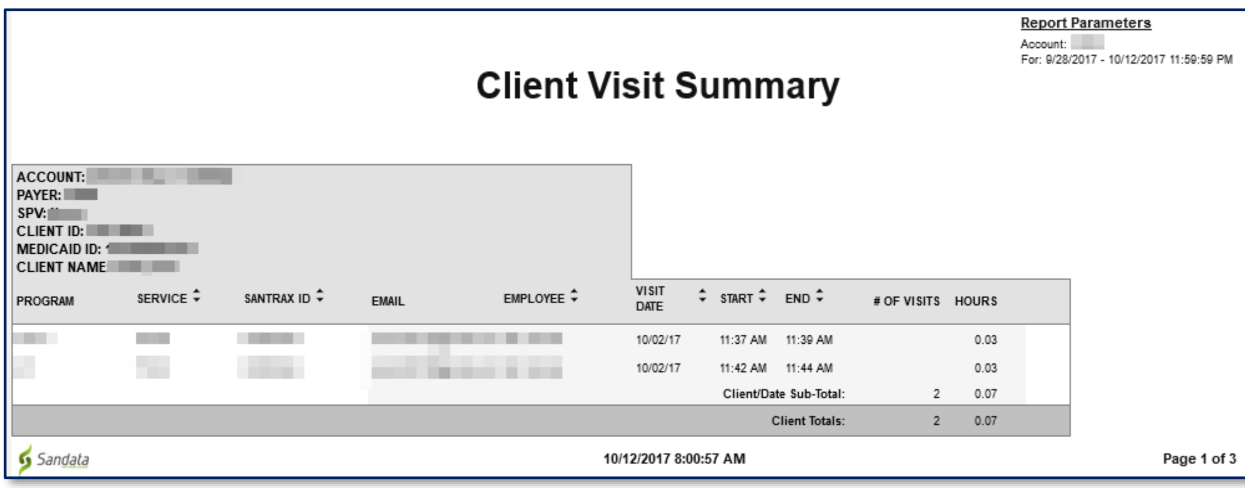
CLIENT NAME	ID TYPE	MEDICAID / PAYER ID	AUTHORIZATION EXPIRED
[illegible]	M	[illegible]	
[illegible]	M	[illegible]	10/18/2018
[illegible]	M	[illegible]	06/30/2019
[illegible]	M	[illegible]	06/30/2019
[illegible]	M	[illegible]	12/17/2019
[illegible]	M	[illegible]	08/22/2019
[illegible]	M	[illegible]	11/26/2018
[illegible]	M	[illegible]	09/30/2019

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 their 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 services were provided to a client for a given time. It also assists in monitoring trends in the services clients are receiving.



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

Client Visit Summary

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

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

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2. **Detail Visit Status Report:** This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee information pertaining to the visit with the visit details such as, exceptions, services, date, time and the actual/adjusted call-in and call-out times.

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

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

Detail Visit Status Report

Account:
Payer: None
Program: None
SPV: None
Status: Incomplete

						Scheduled		Call		Adjusted		
Visit ID	Medicaid ID	Client	Employee	Service	Date	Start	End	In	Out	In	Out	Exceptions
1763805069			Doe, John		08/11/2017				10:22 AM			Unknown Clients, Visits Without In-Calls
1763805512			Doe, John		08/11/2017				10:25 AM			Client Signature Exception, Service Verification Exception, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
1763820813			Mir, Roman		08/11/2017				11:30 AM			Client Signature Exception, Missing Service, Unknown Clients, Visit Verification Exception, Visits Without In-Calls

Sub Total # of Visits: 3

Sandata 8/11/2017 12:53:45 PM Page 3 of 4

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.

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

Summary Visit Status Report

Account:
Payer: ODM
Program: None

	Age					
Status	<1 Days	1 - 5 Days	6 - 10 Days	11 - 15 Days	16 - 31 Days	Total #
In Process	0	0	0	0	0	0
Incomplete	0	12	0	0	0	12
Verified	0	15	0	0	0	15
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
Total #	0	27	0	0	0	27

Sandata 8/14/2017 9:51:25 AM Page 1 of 2

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.

Report Parameters

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

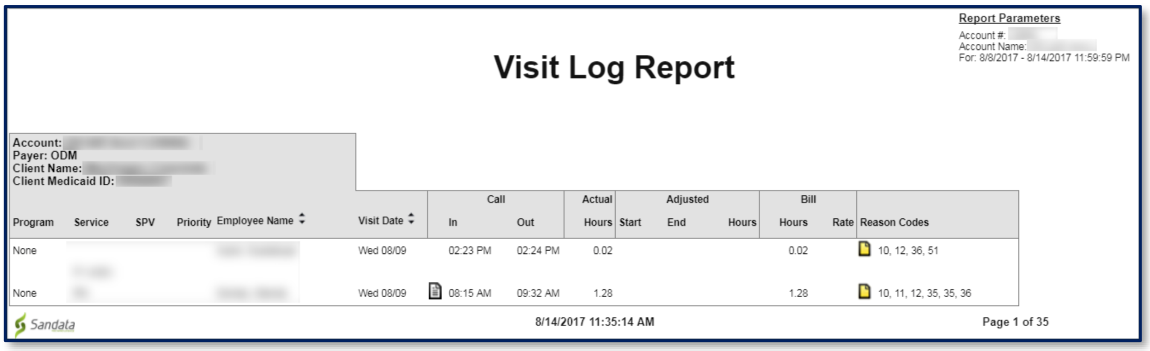
Authorization Summary

CLIENT	PROGRAM	MEDICAID ID	CASE MGR	SOC	SERVICE	EC	REF NO	TOTAL	UNUSED	FROM	TO	LIMITATION	FORMAT
Payer: Medicaid Fee for Service													
America, Captain	FHH	01201991		06/05/2019	1021Z	DEF	123456789	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Arena, Susan	FHH	564747575435353254		06/05/2019	1021Z	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Arena, Susan	FHH	564747575435353254		06/05/2019	1206Z	DEF	Not present	0.00	0.00	06/05/2019	06/05/2019	None	Hour
Arena, Susan	FHH	564747575435353254		06/05/2019	1021Z	DEF	Not present	0.00	0.00	06/05/2019	06/05/2019	None	Hour
Arena, Susan	FHH	564747575435353254		06/05/2019	1206Z	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Crafto, Michael W.	FHH	975312468		06/04/2019	1021Z	DEF	MWC-2	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Freely, I P.	FHH	1357908642		06/05/2019	1214Z	DEF	MWC-1	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Jessup, Nathan	FHH	999888777		06/05/2019	1021Z	DEF	212121	10.00	9.00	06/05/2019	12/31/2019	None	Hour
Liguori, Linda	FHH	456457456756		06/05/2019	1021Z	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Liguori, Linda	FHH	456457456756		06/05/2019	1206Z	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Pitt, Brad	FHH	987099123			1021Z	DEF	B-0987	0.00	0.00	06/05/2019	08/15/2019	None	Hour
QA_H_PI, Christinao	FHH	AMpfjksd118472893423		05/01/2019	1214Z	DEF	Not present	0.00	0.00	05/01/2019	01/31/2020	None	Unit
Smith, John	FHH	234562378		06/05/2019	1021Z	DEF	56478	0.00	0.00	06/05/2019	12/06/2019	None	Hour
Smith, Kawhi A.	FHH	582956578		04/01/2019	1210Z	DEF	000061258974	250.00	240.25	06/05/2019	08/31/2019	None	Hour
Snow, Phoebe	FHH	ss22331q		06/02/2019	1021Z	DEF	12345232423erreff	0.00	0.00	06/02/2019	12/06/2019	None	Hour
Stark, Tony	FHH	123456789012			1021Z	DEF	Not present	0.00	0.00	06/05/2019	12/31/2019	None	Hour
Wayne, Bruce	FHH	1212123		06/06/2019	1021Z	DEF	35342554	0.00	0.00	06/05/2019	10/05/2019	None	Hour
Wunder, Buster	FHH	89721		06/05/2019	1021Z	DEF	90761	420.00	420.00	06/05/2019	01/31/2020	None	Hour
Sub Totals:	Clients: 14						Auths: 18						

Sandata **6/12/2019 12:28:44 PM** **Page 1 of 2**

5. **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.



Report Parameters
Account #:
Account Name:
For: 8/8/2017 - 8/14/2017 11:59:59 PM

Visit Log Report

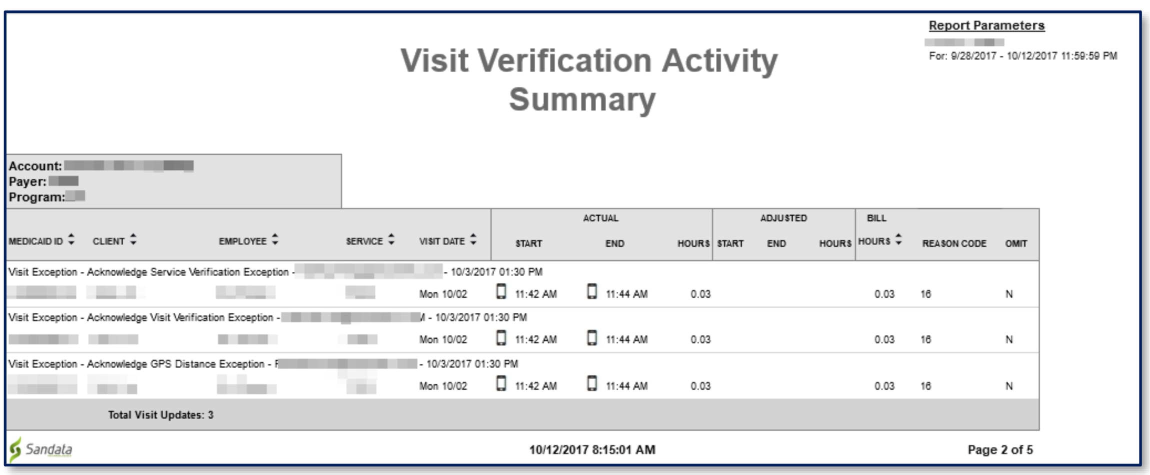
Account:
Payer: ODM
Client Name:
Client Medicaid ID:

					Call		Actual	Adjusted			Bill		
Program	Service	SPV	Priority	Employee Name	Visit Date	In	Out	Hours	Start	End	Hours	Hours	Rate	Reason Codes
None					Wed 08/09	02:23 PM	02:24 PM	0.02				0.02		10, 12, 36, 51
None					Wed 08/09	08:15 AM	09:32 AM	1.28				1.28		10, 11, 12, 35, 35, 36

Sandata 8/14/2017 11:35:14 AM Page 1 of 35

6. **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.



Report Parameters
For: 9/28/2017 - 10/12/2017 11:59:59 PM

Visit Verification Activity Summary

Account:
Payer:
Program:

					ACTUAL			ADJUSTED			BILL		
MEDICAID ID	CLIENT	EMPLOYEE	SERVICE	VISIT DATE	START	END	HOURS	START	END	HOURS	HOURS	REASON CODE	OMIT
Visit Exception - Acknowledge Service Verification Exception - - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Visit Exception - Acknowledge Visit Verification Exception - - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Visit Exception - Acknowledge GPS Distance Exception - - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Total Visit Updates: 3													

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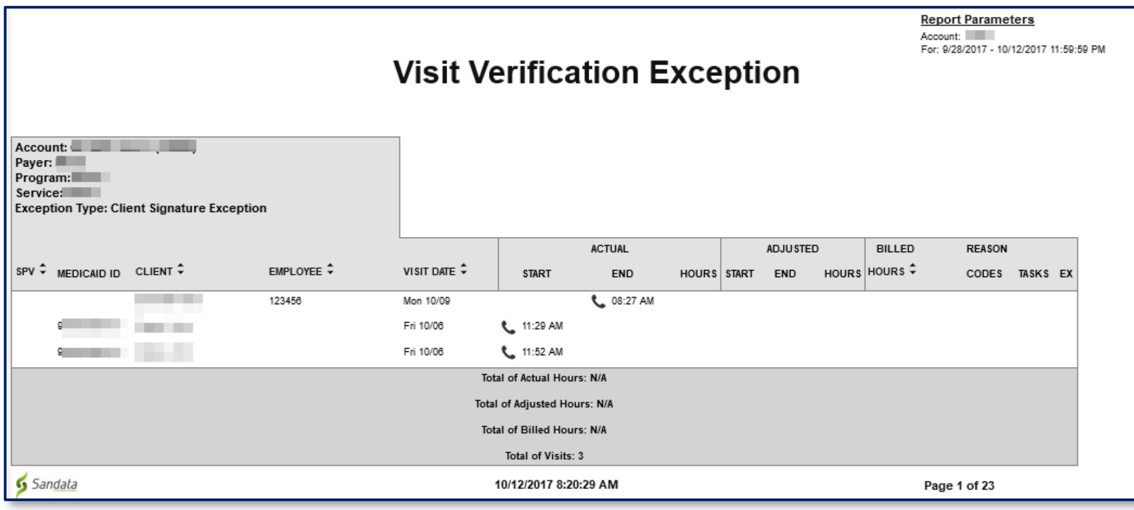
7. **Visit Verification Exception Report:** This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Example: GPS Distance Exception.

Use this report to review the visit verification information and activity for a date range. It lists currently applied exceptions.

TIP

Visits with multiple exceptions appear on multiple pages.



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

Visit Verification Exception

Account: [redacted]
Payer: [redacted]
Program: [redacted]
Service: [redacted]
Exception Type: Client Signature Exception

					ACTUAL			ADJUSTED			BILLED	REASON		
SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	START	END	HOURS	START	END	HOURS	HOURS	CODES	TASKS	EX
		[redacted]	123456	Mon 10/09		08:27 AM								
	[redacted]	[redacted]		Fri 10/06	11:29 AM									
	[redacted]	[redacted]		Fri 10/06	11:52 AM									

Total of Actual Hours: N/A
Total of Adjusted Hours: N/A
Total of Billed Hours: N/A
Total of Visits: 3

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8. **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.

Report Parameters
Account:
For: 9/28/2017 - 10/12/2017 11:59:59 PM
Visit Status: In Process,Incomplete,Verified,Processed,Omit

Visits Claims Verification Status

Account:
Provider Medicaid ID:

Payer	Program	Service	HCPCS	Client Name	Medicaid ID	Visit Date	Visit Start	Visit End	Visit Status	Batch ID	Transaction ID	Visit Verified Date
						10/02/2017	11:42 AM	11:44 AM	Verified			
						10/09/2017	08:24 AM		Incomplete			
						10/09/2017		08:25 AM	Incomplete			
						10/06/2017	03:32 PM		Incomplete			
						10/09/2017		08:27 AM	Incomplete			
						10/09/2017		08:29 AM	Incomplete			
						10/09/2017		08:47 AM	Incomplete			
						09/28/2017	05:16 PM		Incomplete			
						10/06/2017	11:29 AM		Incomplete			
						10/09/2017	08:46 AM		Incomplete			
						10/03/2017	12:00 PM	12:19 PM	Verified			
						10/06/2017	03:30 PM		Incomplete			
						09/28/2017	04:59 PM		Incomplete			
						10/02/2017	11:33 AM	11:35 AM	Incomplete			
						10/02/2017	11:37 AM	11:39 AM	Verified			
						10/09/2017	08:55 AM		Incomplete			
						09/28/2017	04:59 PM		Incomplete			
						10/09/2017	08:23 AM		Incomplete			
						09/28/2017	05:16 PM		Incomplete			
						10/06/2017	11:52 AM		Incomplete			
Sub Total # of Visits: 20												
Total # of Visits: 20												

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10 Appendix

Glossary

A

Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Aggregator	A central data store for Sandata EVV and alternate data collection EVV systems
Alternate EVV System	Any EVV system that is not Sandata's

C

Client	A person who receives services through the Medicaid program

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	Indicates missing visit information or visit information that does not meet the rules of the program

F

FVV	Fixed Visit Verification is the method of calling in and out for a visit when a client does not have or allow the caregiver to use their phone and the caregiver is unable to use the mobile App.

G

GPS	Global Positioning System

M

Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call
MVV	Mobile Visit Verification, the process of using a mobile app to capture the start and end of a visit

P

Privilege	A single security permission that controls an action in the Sandata EVV system

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
Santrax	Sandata's telephonic visit capture product name
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 the Sandata EVV system
Username	One of the fields required to log in to the Sandata EVV system or to log in to the Sandata Mobile Connect App

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