



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Electronic Visit Verification: Sandata Portal and System Overview

P-02747 (10/2021)

Overview Objectives

- Sandata Introduction
- Access and Log in to Sandata Electronic Visit Verification (EVV) Portal
- Reset Password in the Sandata EVV Portal
- Navigate the Sandata EVV Portal

Key Terminology

- Client—A client is a member or participant who receives services through Wisconsin Medicaid.
- Employee—An employee is a person (worker) who is providing care to one or more clients.
- ADA—The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability.

Key Terminology

- 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 a refreshable Braille display.

Sandata EVV Portal

System Introduction

- The Wisconsin Department of Health Services (DHS)-provided EVV solution is Sandata, which:
 - Collects EVV data only.
 - Is not a comprehensive software solution for end-to-end business processes.
 - Does not include billing, payroll, or scheduling.
- Provider agencies can choose to use either the DHS-provided EVV system or an alternate EVV data collection system.

System Introduction

Sandata, the DHS-provided EVV solution, includes these features:

- Security
- Client module
- Employee module
- Visit Maintenance
- Reports
- Mobile Visit Verification (MVV)
- Telephonic Visit Verification (TVV)
- Fixed Visit Verification (FVV)

Sandata System Requirements

The Sandata EVV Portal:

- Is used by office administrative staff.
- Is a web-based system accessed using a web browser such as Mozilla Firefox or Google Chrome.
- Does not display well on a cell phone or tablet.
- Will need high-speed internet with 50 MB minimum bandwidth.
- Requires a PDF viewer to view reports in the Sandata EVV Portal.

Sandata System Requirements

- Sandata Mobile Connect (SMC) is used by employees to record visit data.
- The SMC application works best with:
 - iOS version 11.0 or higher.
 - Android 5.0 or higher.
- Refer to the “Electronic Visit Verification: Sandata Mobile Connect” PowerPoint for more information.

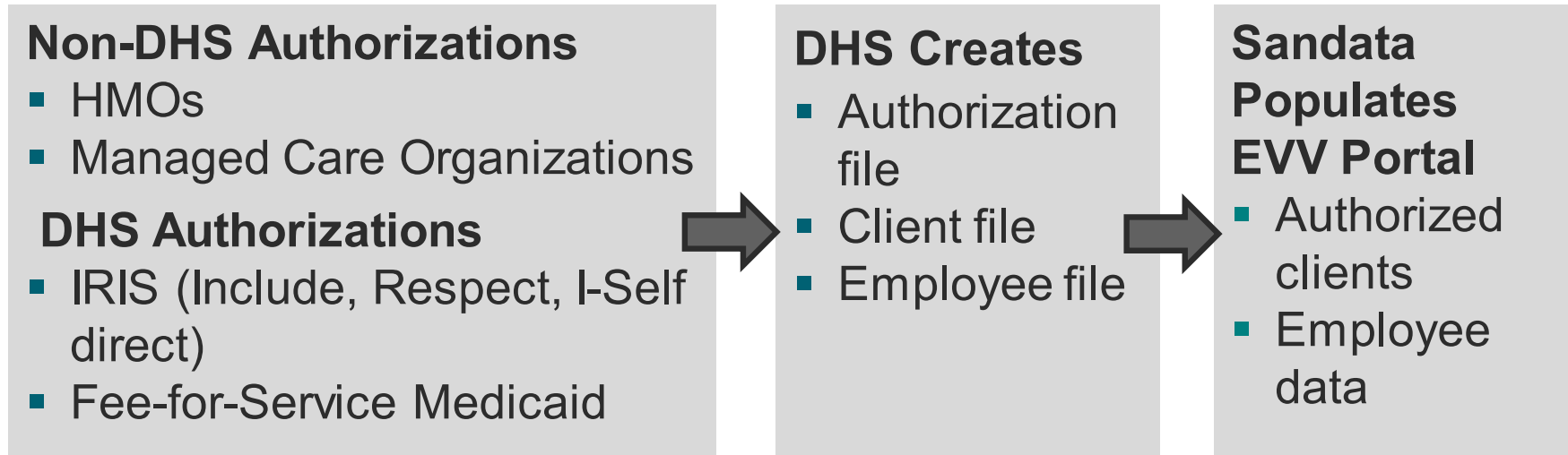
Data Exchange Between DHS and Sandata

Information Exchange

- Information is exchanged nightly between DHS and the Sandata EVV Portal.
- Data sent to the Sandata EVV Portal from DHS includes:
 - Client information.
 - Authorization information.
 - Employee information.
- Data sent to DHS from the Sandata EVV Portal each night includes EVV visit information only.

Information Exchange

Authorization, client, and employee information only moves in one direction, from DHS to Sandata.



Access Sandata EVV Portal

Sandata Portal Account Access

- Once a provider agency completes the EVV training, the provider agency will receive a Welcome Kit email.
- The Welcome Kit is sent from Sandata/e-Trac to the “mail to” email address listed in the ForwardHealth Portal.
- It is recommended that provider agencies have at least two security administrators for both the ForwardHealth and Sandata Portals.

Sandata Portal Account Access

The Welcome Kit email contains:

- The Sandata database URL.
- Sandata EVV Portal security administrator login credentials.
- The Call Reference Guides (provider agency-specific instructions for employees).

Sandata Portal User Credentials

- The provider agency's Sandata EVV Portal security administrator sets up the Sandata EVV Portal using the information in the Welcome Kit email.
- All other administrative portal users are assigned credentials by their provider agency's Sandata EVV Portal security administrator. (See PowerPoint 3: EVV Sandata Portal Security.)

Sandata Portal User Credentials

- These credentials are used to log in to the Sandata EVV Portal.
- The Sandata EVV Portal is not the technology used by employees to gather EVV visit data.

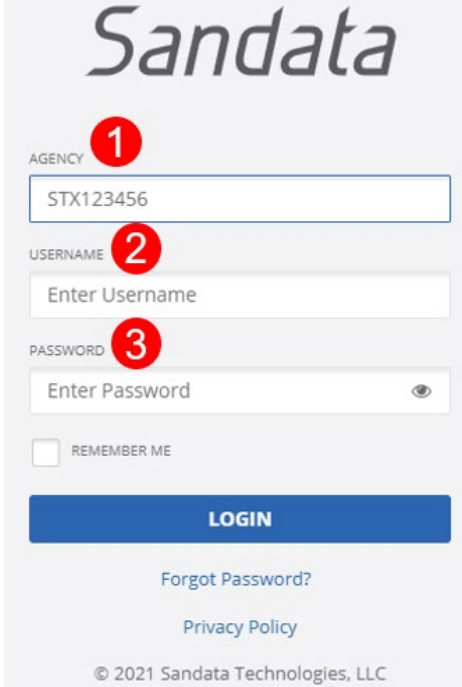
Logging In to Sandata EVV Portal

1. Agency—STX followed by provider agency ID number (Example: STX12345).
2. Username—Enter the email address of the assigned system user (not case sensitive).
3. Password—Must be at least 12 characters long, have one uppercase and one lowercase letter, one numeric character, and one special character (@#\$%^).

Sandata

AGENCY **1**
STX123456

USERNAME **2**
Enter Username

PASSWORD **3**
Enter Password 

REMEMBER ME

LOGIN

[Forgot Password?](#)

[Privacy Policy](#)

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Logging In to Sandata EVV Portal (2)

4. Remember Me—Check this box to preserve the last agency and username entered (not the password).
5. Login—Click this button to access Sandata EVV Portal.

A screenshot of the Sandata EVV Portal login interface. At the top, the word "Sandata" is written in a large, italicized, grey font. Below it, there are four input fields: "AGENCY" with the value "STX123456", "USERNAME" with the placeholder "Enter Username", "PASSWORD" with the placeholder "Enter Password" and a small eye icon to its right, and a "REMEMBER ME" checkbox. A red circle with the number "4" is placed over the "REMEMBER ME" checkbox. Below these fields is a blue "LOGIN" button with a red circle containing the number "5" over it. Under the button are two links: "Forgot Password?" and "Privacy Policy". At the bottom, the copyright notice "© 2021 Sandata Technologies, LLC" is displayed.

Reset Password in Sandata EVV Portal

Reset Password in Sandata EVV Portal

1. Click **Forgot Password?**
2. Enter user's email address (same as username).
3. Click **Reset Password**. A temporary password is emailed from Sandata.
4. Click **Back to Login** to return to the login screen.

The image displays two screenshots of the Sandata EVV Portal interface. The left screenshot shows the login page with the Sandata logo at the top. Below the logo are three input fields: 'AGENCY' (containing 'STX'), 'USERNAME' (containing 'Enter Username'), and 'PASSWORD' (containing 'Enter Password'). There is a 'REMEMBER ME' checkbox and a blue 'LOGIN' button. At the bottom, there is a 'Forgot Password?' link highlighted with a red box and a '1' in a red circle. The right screenshot shows the password reset page with the Sandata logo at the top. Below the logo is an 'EMAIL ADDRESS' input field containing 'Enter Email Address', highlighted with a red box and a '2' in a red circle. Below this is a blue 'RESET PASSWORD' button highlighted with a red box and a '3' in a red circle. At the bottom, there is a 'Back to Login' link highlighted with a red box and a '4' in a red circle. A large grey arrow points from the right screenshot back to the left screenshot.

Reset Password in Sandata EVV Portal

- Enter the temporary password in the Old Password field.
- Enter a new password in the New Password field.
- Re-enter the password in the Confirm New Password field.
- Click **Save**.

See PowerPoint 3: Security Format



Sandata

Change Password

OLD PASSWORD*

Enter Old Password

NEW PASSWORD*

Enter New Password

CONFIRM NEW PASSWORD*

Confirm New Password

Note: Password is case sensitive

SAVE

Navigate the Sandata EVV Portal

Navigate Modules

After successful login, the default Dashboard screen is displayed.

The screenshot displays the Sandata EVV Dashboard. On the left is a blue navigation sidebar with the following items: Sandata EVV logo, a search icon for 'Navigate Modules', a 'Dashboard' icon, and menu items for 'Clients', 'Employees', 'Visit Maintenance', 'Reports and Exports', 'Security', and 'Online Manual'. The main content area is titled 'Dashboard Dashboard' and includes a search bar for 'Enter agency' and a 'LOG OUT' button. Below this is a 'Filter Options' section with a 'REFRESH EVERY' input set to '5' minutes (range 2min - 30max), a 'SUPERVISORS' dropdown menu set to 'Select Supervisors', and a 'REFRESH NOW' button. At the bottom, there are two summary cards: 'Unknown Clients' and 'Unknown Employees', both showing a count of '0'.

ADA Navigation Support

- The Sandata EVV Portal can be navigated using only the tab and enter keys if needed.
- The Sandata EVV Portal is JAWS Reader compliant for those who are visually impaired.

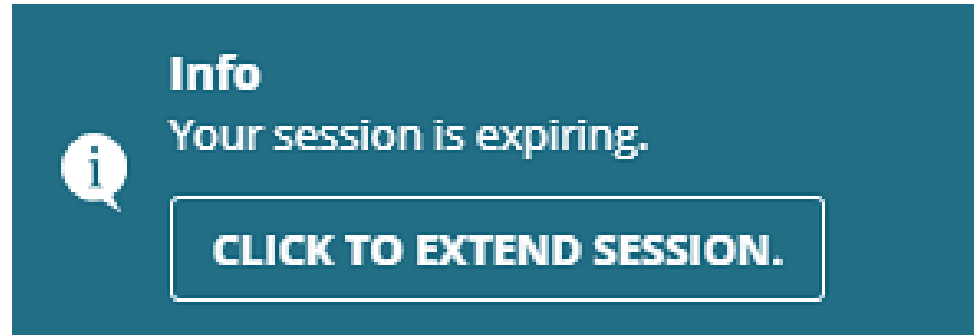
ADA Navigation Support

- Tab to or click on **Navigate Modules** from the Sandata EVV Portal panel.
- Start typing a module and a list will appear for selection.



ADA Navigation Support

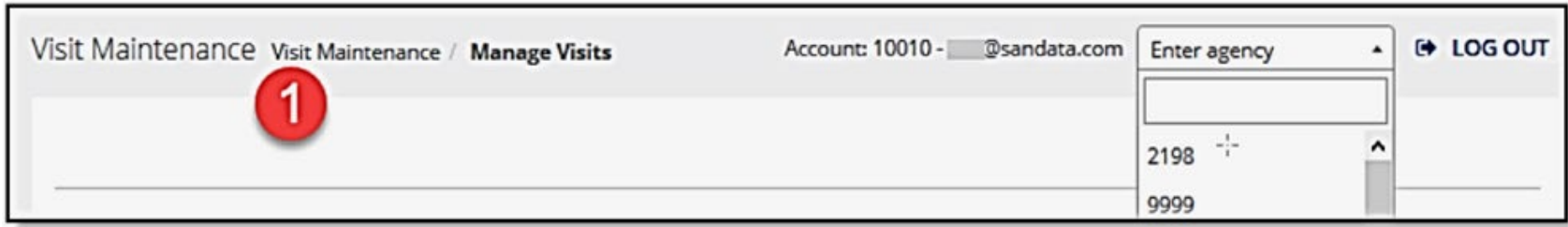
When a user remains idle for 15 minutes, the system displays a warning message with a button to extend the session if they require more time.



Navigating Common Elements

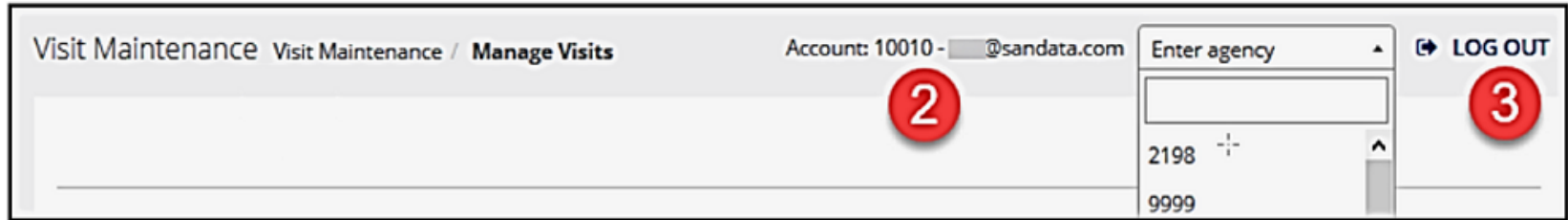
The Sandata header is located at the top of every screen in the Sandata EVV Portal and displays key information about each screen:

1. The Navigation Path shows the exact location in the system and the current screen.



Navigating Common Elements

2. Account and User Display shows the account of the logged in user.
3. Log Out logs the user out of the system and returns to the log in screen.



Navigating Common Elements

Any confirmation or error messages will appear at the top center of the screen.



Success

Visit is successfully updated.







Error

Call date/time in future is not allowed

Navigating Common Elements

Assignment buttons appear whenever a screen has a setting that requires moving items between available and assigned fields.

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.

Resources

Resources

- EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.– 6 p.m.
- Email support at VDXC.ContactEVV@wisconsin.gov
- EVV webpage at <https://www.dhs.wisconsin.gov/evv/index.htm> for information about the following:
 - Training Resources
 - EVV in Wisconsin
 - The ForwardHealth Portal

Thank You