

Electronic Visit Verification: Sandata EVV Portal Security

November 2023
Wisconsin EVV



P-02748 (12/2023)

Welcome to the training for Electronic Visit Verification: Sandata EVV Portal Security.

Objectives

- Review Security Administrator Access
- Reset Sandata Electronic Visit Verification (EVV) Portal Users Password
- Create, Modify, and Delete Sandata EVV Portal User
- Create, Modify, and Delete Sandata EVV Portal User Roles and Privileges

Here are our objectives today:

- Review Security Administrator Access
- Reset Sandata Electronic Visit Verification (EVV) Portal Users Password
- Create, Modify, and Delete Sandata EVV Portal User
- Create, Modify, and Delete Sandata EVV Portal User Roles and Privileges

In short, you'll learn how to set up your administrative team on the Sandata EVV Portal, and get ready for the business of EVV.

Note: A Sandata EVV Portal user should **not** also provide care. There could be a perceived conflict because of the editing function of the Portal. An exception is independent nurses, who are an "agency of one" and both worker and administrator.

So for this section, put aside your thoughts of workers who are with clients. This section is about the office landscape.

Key Terminology

- Security Admin—The person at the provider agency with the ability to create new users, assign roles and system privileges, and reset passwords.
- Security—The module in Sandata EVV Portal where users (office staff) are set up to use the system.
- User—A person with a unique login and password to the Sandata EVV Portal.
- Username—The user's email address.

3

We'll cover some key terminology that will be used throughout today's training. These are the terms used within the Sandata system:

- Security Admin—The person at the provider agency with the ability to create new users, assign roles and system privileges, and reset passwords. This is likely some of you in this training.
- Security—The module, or part of the Sandata EVV Portal, where the administrator sets up users (office staff) the system.
- User—A person with a unique login and password to the Sandata EVV Portal. User refers to administrative office staff using the Sandata EVV Portal.
- Username—The user's email address. Since the username is the users email address, it's important that the email address is unique to each user.

Key Terminology

- Role—A group of privileges (permissions) assigned to the user that allows the user to take care of administrative activities in the Sandata EVV Portal.
- Privilege—A single permission within the Sandata EVV Portal.

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- Privilege—A single permission within the Sandata EVV Portal.

Sandata EVV Portal Security Admin Access

Let's start with Sandata EVV Portal Security Admin Access

Sandata EVV Portal Security Admin Access

Security admins can:

- Assign roles to specific users.
- Create user roles.
- Assign system privileges to roles.
- Grant and revoke system privileges.
- Reset and unlock user Sandata EVV Portal and Sandata Mobile Connect passwords.
- Reset own password.

6

Security admins take the lead in EVV. They can access all administrative functions and grant access to other users, too. Here's a sampling of what they can do:

- Assign roles to specific users.
- Create user roles.
- Assign system privileges to roles.
- Grant and revoke system privileges.
- Reset and unlock user Sandata EVV Portal and Sandata Mobile Connect passwords.
- Reset own password.

Sandata EVV Portal Security Admin Access

- At least two portal security admins are recommended per provider.
- The security admin will assign other administrative users to the Sandata EVV Portal.

7

At least two portal security administrators are recommended per provider. What if the security admin gets sick, takes a vacation, or leaves the company? You want backup in this role.

Consider who you'd grant this backup role to. If you are an independent nurse (an agency or one), think through your backups in your business and plan accordingly.

Sandata EVV Portal Security Admin Access

- The provider's EVV administrator should be the first individual to take EVV training.
- The provider's "mail to" contact listed in the ForwardHealth Portal will receive Sandata's Welcome Kit email with information on accessing Sandata EVV Portal.
- This email address holder will have the role of security admin for the Sandata EVV Portal.

8

- The provider's EVV administrator should be the first individual to take EVV training.
- The provider's "mail to" email listed in the ForwardHealth Portal will receive Sandata's Welcome Kit email. It includes information on accessing Sandata EVV Portal.

This email address holder will, by default, be assigned the role of security admin for the Sandata EVV Portal. If this is not the way you'd like it assigned, hang on: we'll take a look at assigning others later. For now, make sure you know who will be receiving the Welcome Kit, and consider if this is the best person for the security admin role.

Sandata EVV Portal Security Admin Access

The Welcome Kit will provide the security admin's credentials for logging in to the Sandata EVV Portal.



Dear Provider:

Welcome to the Wisconsin Department of Health Services (DHS) Electronic Visit Verification (EVV) Program provided by Sandata Technologies. You can now set up administrative users for your Sandata EVV system by following these quick steps:

- Access the Sandata EVV Login page: <https://evv.sandata.com/VM/Login>.

Quick Tip: To quickly access your EVV system every time, bookmark this webpage. Here are instructions on how to do it for different browsers:

[Mozilla Firefox](#)
[Google Chrome](#)
[Microsoft Edge](#)

- Enter your administrative credentials:

▶ Agency: STX «###»
▶ Username: «Username»
▶ Temporary Password: «EVV Account Password»

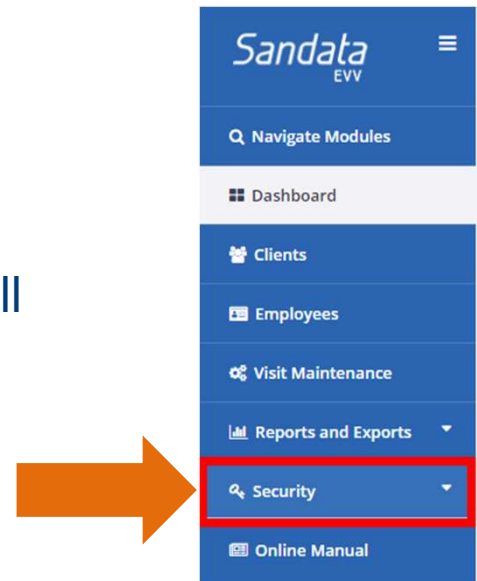
- Change your password.

The temporary password is valid for 60 days. After successfully logging in with your temporary credentials, the system will prompt you to change your password immediately for security reasons.

This is a sample of the Welcome Kit letter that will be emailed. It will have the login credentials listed and a temporary password for the security admin to use.

Sandata EVV Portal Security Admin Access

- **Log in** to the Sandata EVV Portal.
- Locate the navigation panel on the left side of the screen.
- Select **Security**. The security panel will expand and display three sections of security settings.



10

Where do you access portal security?

- **Log in** to the Sandata EVV Portal, using the link in the Welcome Kit.
- Locate the navigation panel on the left side of the screen.
- Select **Security**. The security panel will expand and display three sections of security settings.

Let's look at these three security sections on the next slide.

Sandata EVV Portal Security Admin Access

1. **Manage Users**—Allows the security admin to create and maintain users.
2. **Manage User Roles**—Allows the security admin to group privileges and assign them to users of the Sandata EVV Portal.
3. **Change Password**—Allows logged in users to change their own password.



11

These are unique to Security Admins:

1. **Manage Users**—Allows the security admin to create and maintain users.
2. **Manage User Roles**—Allows the security admin to group privileges and assign them to users of the Sandata EVV Portal.
3. **Change Password**—Allows logged in users to change their own password.

Other portal users will only see “Change password” in this section.

Again, put aside your thoughts of workers who are with clients. We are focused on the office landscape.

Manage Users: Create Sandata EVV Portal User

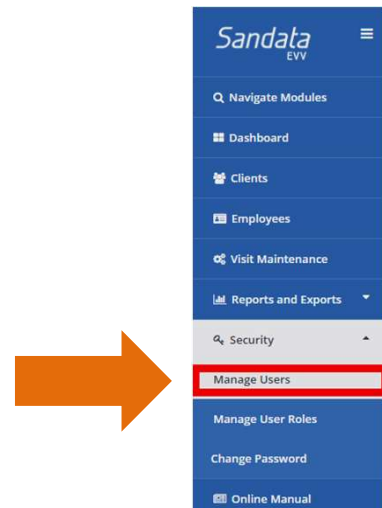
The Manage Users function sets up new Sandata EVV Portal administrative users. The security administrator will create a user and then assign user roles based on what function that user will need access to. If you are an independent nurse (an agency of one), think through your backups in your business and plan accordingly.

For all others, again, put aside your thoughts of workers who are with clients. We are focused on the office landscape and administrative roles.

Create Sandata EVV Portal User

Only the security admin may create a new Sandata EVV Portal user:

- Click **Security**.
- Select **Manage Users** from the drop-down menu.



13

As we saw earlier, only the security admin may create a new Sandata EVV Portal user. We see a screenshot from their portal here. Other users won't have these options available:

- Click **Security**.
- Select **Manage Users** from the drop-down menu.

Create Sandata EVV Portal User

- Enter the appropriate criteria (username, first name, or last name).
- Click **Search**.
- Select **Create User** button if User Not Found message displays.



The screenshot shows a web interface for 'User Management' with a sub-header 'Security / Manage Users'. Below the header is a search bar labeled 'Select a User' with a blue 'CREATE USER' button to its right. Underneath the search bar are three input fields: 'USERNAME' with the placeholder 'Enter Username', 'FIRST NAME' with the placeholder 'Enter First Name', and 'LAST NAME' with the placeholder 'Enter Last Name'.

14

Always perform a search before creating a new user. You can search by username (email address), or portions of a name.

If a user is found, information will be displayed. You can also click search and a list of all users associated to the provider agency will be displayed. This is a method we will use in other parts of the EVV Portal too.

Create Sandata EVV Portal User

The Create User screen will be displayed.

Create User

CREATE USER

USERNAME/EMAIL *

Enter Username/Email

CONFIRM USERNAME/EMAIL *

Confirm Username/Email

LAST NAME *

Enter Last Name

FIRST NAME *

Enter First Name

☐ LOCKED

AVAILABLE ROLES

ASST_COORD
COORDINATOR
SECURITY_ADMIN

»
>
<
«

ASSIGNED ROLES

AVAILABLE PRIVILEGES

Acknowledge exception: Actual Hours more than Scheduled Hours
Acknowledge exception: Billing Hours less than Scheduled Hours
Acknowledge exception: Client Eligibility
Acknowledge exception: Client Signature Exception
Acknowledge exception: Client Speaker Verification Bypassed
Acknowledge exception: Client Speaker Verification Exception
Acknowledge exception: Early Out-Call
Acknowledge exception: Employee Replacement
Acknowledge exception: Employee Speaker Verification Exception
Acknowledge exception: Excessive Calls
Acknowledge exception: GPS Distance Exception
Acknowledge exception: Invalid Contract / Payer

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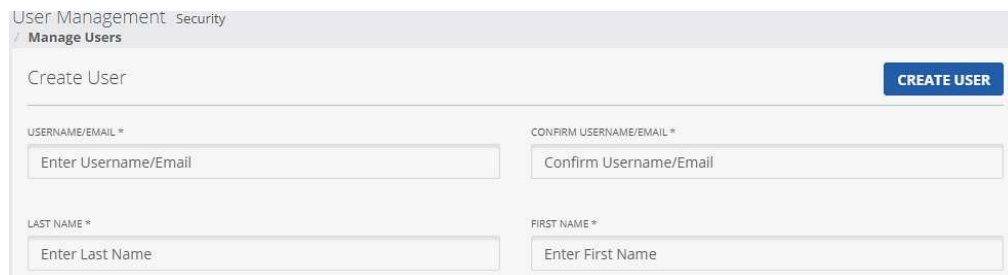
ASSIGNED PRIVILEGES

15

The Create User screen will be displayed. In the next several slides, we will break down this screen and cover it in sections.

Create Sandata EVV Portal User

- Enter the user's unique email address; this will become their username.
- Enter user's first and last name.



The screenshot shows a web interface for 'User Management' with a sub-tab 'Security' and a page title 'Manage Users'. The main heading is 'Create User', followed by a blue 'CREATE USER' button. Below this are four input fields arranged in a 2x2 grid. The top-left field is labeled 'USERNAME/EMAIL *' and contains the placeholder text 'Enter Username/Email'. The top-right field is labeled 'CONFIRM USERNAME/EMAIL *' and contains the placeholder text 'Confirm Username/Email'. The bottom-left field is labeled 'LAST NAME *' and contains the placeholder text 'Enter Last Name'. The bottom-right field is labeled 'FIRST NAME *' and contains the placeholder text 'Enter First Name'.

16

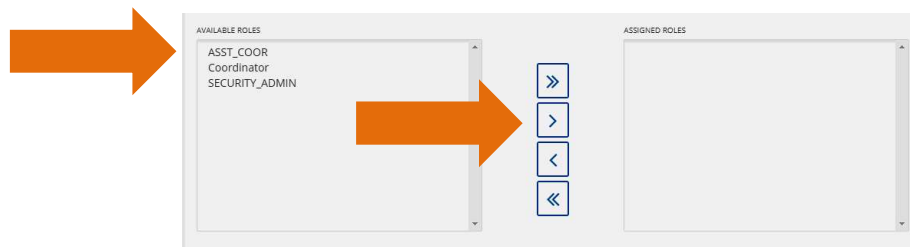
All fields with an asterisk are required.

- Enter the user's unique email address; this will become their username.
- Enter user's first and last name.

The email address used is where the user's temporary password will be emailed. This email must be unique to only one user; it cannot be a shared email address.

Create Sandata EVV Portal User

- Assign roles for the user in the Sandata EVV Portal. There are pre-configured roles available.
- Highlight the selected role and click the > button to move it into the **Assigned Roles** box.



17

- Assign roles for the user to have functionality in the Sandata EVV Portal. There are pre-configured roles available, and later we'll look at how to add customized roles.
- Highlight the selected role and click the > button to move it into the **Assigned Roles** box.

As you see, this is where another security admin can be assigned either as back-up or as a replacement. Only someone who is currently a security admin can do this, of course.

You can assigned more than one role to a user as desired.

Create Sandata EVV Portal User

- The Sandata EVV Portal includes the following standard set of roles across all agencies.

ASST_COORDINATOR	Sandata EVV Portal generalist that supports visit verification and visit reporting
COORDINATOR	Asst_Coor role, plus Intake/manage clients, intake/manage employees.
SECURITY_ADMIN	Coordinator role, plus Agency set up, create and manage all EVV portal users.

18

The Sandata EVV Portal includes the following standard set of roles across all providers. Take a look and consider your office setting, and how you'd like to assign duties.

What a role can do builds as you go down this list. For example, the Coordinator role will have Asst Coordinator privileges plus specific Coordinator privileges. The Security Admin role has access to all privileges. These Sandata provided roles cannot be modified.

The only role that is required, of course, is the security admin.

Create Sandata EVV Portal User

- Click **Create User**. A successful confirmation message will be displayed.



Create Sandata EVV Portal User

Sandata will send an email to the email address entered.

The new user can finish setting up their account:

- Copy the temporary password.
- Click **Login** within the email.



20


Once additional users are created, they will receive an email with their temporary password. The email will be sent to the email address that was entered into the Sandata EVV Portal and will be their Portal username.


They can finish setting up their Sandata EVV Portal account by copying the temporary password, and logging in to the portal.



Manage Users: Modify Sandata EVV Portal User

Let's move on to how the security admin's Manage User options can be used to unlock a user's portal account if they have been locked out, change assigned roles, and more. If you are an independent nurse (an agency of one), think through your backups in your business and plan accordingly.

Modify Sandata EVV Portal User: Unlock User

- When a user is locked out of the Sandata EVV Portal, the security admin will perform a user search.
- Click **Edit**  in the **Actions** column on the right-hand side of the screen for the appropriate user.



Username	User Type	Account Status	First Name	Last Name	Actions
TEST.ONE@SANDATATEST.COM	ADMIN	OPEN	One	Test	 

« < 1 > »

Showing 1 to 1 of 1 entries

Here's a handy use in this category: helping another portal user when they are locked out.

If a user attempts to log in three times in a row with an incorrect password, they will be locked out of the Sandata EVV Portal. A Sandata user with security privileges will need to unlock.

The security admin can search for the user, just as we did before. They can click on the pencil icon to edit the user's account.

Modify Sandata EVV Portal User: Unlock User

- The **Locked** box is checked.
- Uncheck the **Locked** box to unlock an account.
- Click **Modify User**. A successful confirmation message will be displayed.



The screenshot shows a 'Modify User' form. At the top, there is a title 'Modify User' and a blue button labeled 'MODIFY USER'. An orange arrow with the number '2' points to this button. Below the title, there are three input fields: 'USERNAME/EMAIL *' with the value 'TEST.ONE@SANDATATEST.COM', 'LAST NAME *' with the value 'Test', and 'FIRST NAME *' with the value 'One'. At the bottom of the form, there is a checkbox labeled 'LOCKED' which is currently checked. An orange arrow with the number '1' points to this checkbox.

23

Scrolling down on the user's account page, there's a box labeled "Locked" that will be checked. Uncheck the box, and then click Modify User.

Modify Sandata EVV Portal User: Unlock User

- Click the **Reset Password** button. A Sandata email is automatically sent to the user with a temporary password.


The screenshot displays the 'User Management' interface with the 'Manage Users' tab selected. The 'Modify User' form is visible, showing fields for 'USERNAME/EMAIL *' (TEST.ONE@SANDATATEST.COM), 'LAST NAME *' (Test), and 'FIRST NAME *' (One). A 'MODIFY USER' button is at the top right of the form. Below the form, there is a 'LOCKED' checkbox and a 'RESET PASSWORD' button. An orange arrow points from the 'RESET PASSWORD' button to the right. To the right of the form, a 'Reset Password' dialog box is open, asking 'Are you sure you want to reset password for this user?'. It has 'CANCEL' and 'OK' buttons. An orange arrow points from the 'OK' button to the left. Below the dialog box, a green 'Success' message box states 'Email with temporary password sent to user.'



Next, click Reset Password. After clicking the reset password, a pop-up box will appear asking if you are sure. Select OK, then a successful confirmation box will be displayed.

An email will be sent to the user with a temporary password so they can log in again.

Modify Sandata EVV Portal User: Add or Remove User Roles

- The security admin will perform a user search.
- Click **Edit**  in the **Actions** column on the right-hand side of the screen for the appropriate user.



Username	User Type	Account Status	First Name	Last Name	Actions
TEST.ONE@SANDATATEST.COM	ADMIN	OPEN	One	Test	 

« < 1 > »

Showing 1 to 1 of 1 entries

A second modification that might come up is reassigning roles for users. Again, this is only done by the security admin.

As before, the security admin searches for and selects the user. Click on the pencil icon to edit the user's account.

Modify Sandata EVV Portal User: Add or Remove User Roles

- Add roles to or remove roles from the assigned roles box using arrows < or >.
- Click **Modify User**. A successful confirmation message will be displayed.

The screenshot displays the 'Modify User' web form. At the top, the title 'Modify User' is shown. Below it, there are input fields for 'USERID/NAME' (containing 'TEST.ONE@SANDATATEST.COM'), 'LAST NAME' (containing 'Test'), and 'FIRST NAME' (containing 'One'). A 'LOCKED' checkbox is present, and a 'RESET PASSWORD' button is on the right. Below these fields are two lists: 'AVAILABLE ROLES' (containing 'CLERICAL', 'COORDINATOR', and 'SECURITY_ADMIN') and 'ASSIGNED ROLES' (containing 'ASST_COOR'). Between these lists are four arrow buttons: a double right arrow (>>), a single right arrow (>), a single left arrow (<), and a double left arrow (<<). An orange arrow labeled '1' points to the single right arrow (>) button. In the top right corner, there is a 'MODIFY USER' button, with an orange arrow labeled '2' pointing to it.

26

The security admin can make reassignments by clicking on the name of the role to be moved, and then using the arrow to add or remove it.
Be sure to click Modify User in the top right to save these changes.

Manage Users: Delete Sandata EVV Portal User

Deleting a user should be used when an administrative staff no longer works for your agency. This step should be considered as part of your “off boarding” procedures that the security admin does.

Note: Sandata EVV Portal User accounts cannot be set to “inactive.” They are either active or deleted.

If you are an independent nurse (an agency of one), think through your backups in your business and plan accordingly.

Delete Sandata EVV Portal User

- The security admin performs a user search.
- Click the **Delete** 🗑 icon under the **Actions** column on the right-hand side of the screen of the appropriate user.



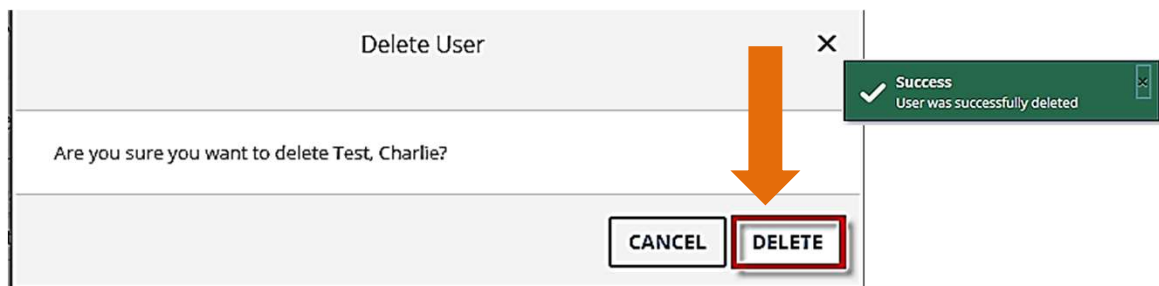
Username	User Type	Account Status	First Name	Last Name	Actions
TEST.ONE@SANDATATEST.COM	ADMIN	OPEN	Test	One	 

28

As before, the security admin searches for the user. This time, the garbage can icon will be used to delete the user.

Delete Sandata EVV Portal User

- Click **Delete**. A successful confirmation message will be displayed.



29

A confirmation screen will pop up. Click **Delete**. A successful confirmation message will be displayed.

Manage User Roles: Create New Sandata EVV Portal User Roles

We're getting to the advanced level now: Let's look at how the security admin can create new Sandata EVV Portal user roles.

Create New Sandata EVV Portal User Roles

- Sandata has pre-configured roles that cover all functions of the system. These cannot be modified.
- Creating new roles allow security admins to tailor a set of system functions for each job title in the organization.
- Editing any data within a role will affect all users who have been assigned that role.

31

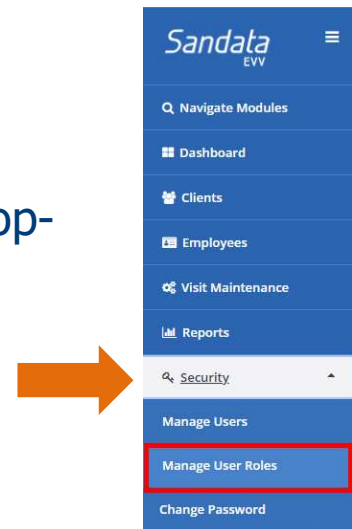
We've already seen the three pre-configured roles within Sandata's EVV Portal: security admin, coordinator, and assistant coordinator. These cannot be modified.

But, security admins can look at their business need and create new roles with different layers of privileges.

Create New Sandata EVV Portal User Roles

Security admins:

- Click **Security**.
- Select **Manage User Roles** from the drop-down menu.



Create New Sandata EVV Portal User Roles

Click the **Create User Role** button.



The screenshot shows the 'Manage User Roles' interface. At the top right, there is a blue button labeled 'CREATE USER ROLE' which is highlighted with a red rectangular box. A large orange arrow points from the right towards this button. Below the button, there is a 'Show: 10 per page' dropdown menu. Further down, there is a pagination control with buttons for '<<', '<', '1', '>', and '>>'. Below the pagination, it says 'Showing 1 to 4 of 4 entries'. At the bottom, there is a table with three columns: 'Role Name', 'Role Description', and 'Actions'.

Role Name	Role Description	Actions
SECURITY_ADMIN	Members can run SECURITY application	
COORDINATOR	N/A	
ASST_COOR	N/A	

33

The manage user roles screen will be displayed.
Click the **Create User Role** button.

Create New Sandata EVV Portal User Roles

- Enter a **Role Name**.
- Enter **Role Description** (optional).

The screenshot shows a web form titled "Create User Role". It contains two input fields. The first field is labeled "ROLE NAME *" and has the text "Clerical" entered. An orange arrow with the number "1" points to this field. The second field is labeled "ROLE DESCRIPTION" and has the text "Password Change Only" entered. An orange arrow with the number "2" points to this field.

34

This is where you start tailoring the role: First, give it a name. Perhaps it will match a job title within your agency. Entering a role description is optional, but helpful.

Create New Sandata EVV Portal User Roles

- Highlight the privilege(s) to be assigned to the new role in the Available Privileges box.
- Use arrows to move available privileges to the Assigned Privileges box.
- Click **Create User Role**.

The screenshot shows the 'Create User Role' form. It has two input fields at the top: 'ROLE NAME *' and 'ROLE DESCRIPTION'. Below these are two list boxes: 'AVAILABLE PRIVILEGES' on the left and 'ASSIGNED PRIVILEGES' on the right. The 'AVAILABLE PRIVILEGES' list contains items like 'Exports - Access Module', 'Reports - Reporting', 'Reports - Run Corp Group Reports', 'Reports - Run Daily Reports', 'Reports - Run Export Reports', 'Reports - Run Plan of Care Reports', 'Reports - Run Scheduled Reports', 'Reports - Run Security Reports', 'Contract/Payer - Add Contract', 'Email Address - Add', 'Email Address - Delete', and 'Email Address - Update'. Between the two list boxes are four arrow buttons: a double right arrow (»), a single right arrow (>), a single left arrow (<), and a double left arrow («). A red box highlights these arrow buttons, and an orange arrow points to them from below. Another red box highlights the 'CREATE USER ROLE' button at the bottom right, with an orange arrow pointing to it from below.

35

- Highlight the privilege(s) to be assigned to the new role in the Available Privileges box.
- Use arrows to move available privileges to the assigned privileges box.
- Click **Create User Role**.

Note: For Wisconsin, privileges related to billing and scheduling may be listed but are not activated. Billing and scheduling are not part of the DHS-provided EVV system.

Create New Sandata EVV Portal User Roles

A confirmation message will be displayed.



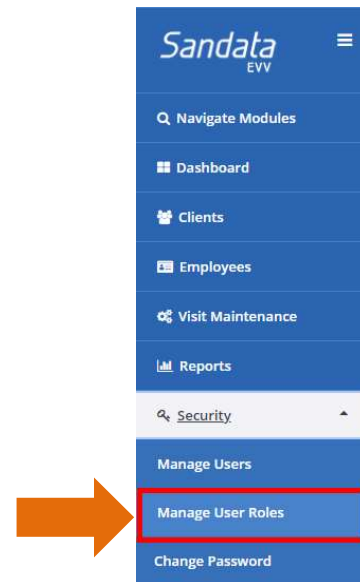
Manage User Roles: Modify Sandata EVV Portal User Role

Perhaps you've created a new role and want to change it later. The security admin can do that. But remember: anyone with that role will have those changes applied to them. Let's take a look at modifying a Sandata EVV Portal user role.


Modify Sandata EVV Portal User Role

Security admin:

- Click **Security**.
- Select **Manage User Roles** from the drop-down menu.



Modify Sandata EVV Portal User Role

- Sandata-provided roles cannot be modified.
- Select the role to be edited.
- Click **Edit**  in the Actions column on the right-hand side of the screen of the appropriate role.



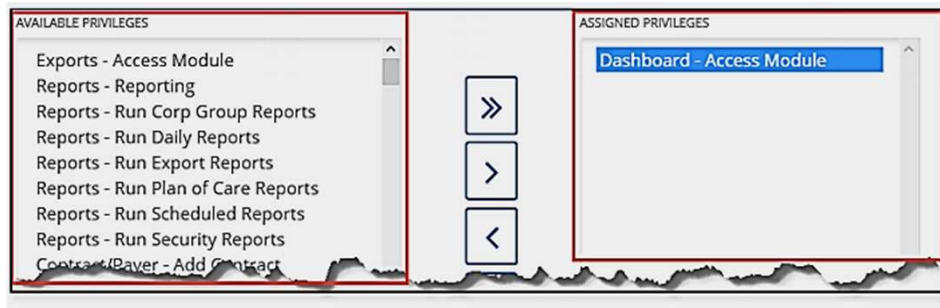
Role Name	Role Description	Actions
CLERICAL	Clerical Staff	 
VISIT SPECIALIST	Correct visit exceptions	 
INDIVIDUAL PROVIDER	Individual Provider Role	 

39

Remember that the three standard roles, security admin, coordinator, and assistant coordinator, cannot be removed or modified. But the security admin can modify any new roles created. Here, three new roles were created and can be modified.

Modify Sandata EVV Portal User Role

Add available privileges or remove assigned privileges as necessary.

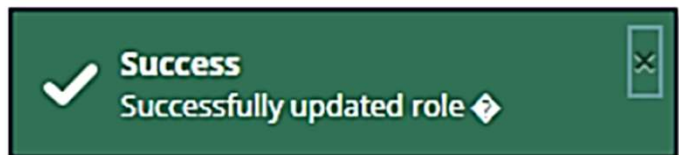


40

Just as before, highlight and then add or remove privileges using the arrows.

Modify Sandata EVV Portal User Role

Click **Modify User Role**. If successful, a confirmation message will be displayed.



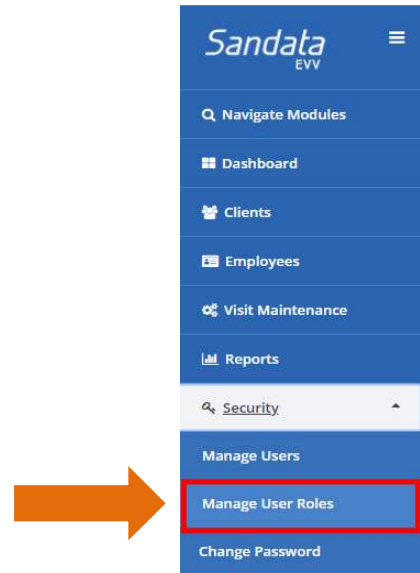
Manage User Roles: Delete Sandata EVV Portal User Role

Now lets how to Delete a Sandata EVV Portal user role


Delete Sandata EVV Portal User Role

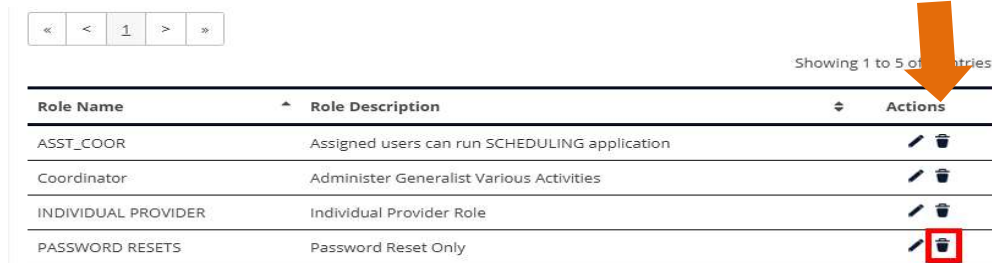
Security admin:

- Click **Security**.
- Select **Manage User Roles** from the drop-down menu.











Delete Sandata EVV Portal User Role

- Click the **Delete**  icon under the **Actions** column on the right-hand side of the screen of the appropriate role name.
- Sandata-provided roles cannot be modified or deleted.
- Roles being deleted cannot be assigned to any user.



Showing 1 to 5 of 5 entries

Role Name	Role Description	Actions
ASST_COOR	Assigned users can run SCHEDULING application	 
Coordinator	Administer Generalist Various Activities	 
INDIVIDUAL PROVIDER	Individual Provider Role	 
PASSWORD RESETS	Password Reset Only	 

Click the **Delete** (garbage can) icon under the **Actions** column on the right-hand side of the screen of the appropriate role name.

As we've seen before, Sandata's pre-configured roles are locked for editing and cannot be deleted. In addition, a role cannot be deleted if it is assigned to any user. A message "This role has been assigned to users. Delete Role Failed" will be displayed. You'll need to assign the user to a new role first, and then delete the undesired role.

Delete Sandata EVV Portal User Role

Click **Delete**. A confirmation message will be displayed.

Delete User Role

Are you sure you want to delete CLERICAL?

CANCEL DELETE


Success
Role was successfully deleted

Reset Own Sandata EVV Portal Password

Let's move to how to reset your own Sandata EVV Portal Password.

This is an important topic—most of us have been in a situation where we forget our password, or mistype it too many times.

Reset Own Sandata EVV Portal Password

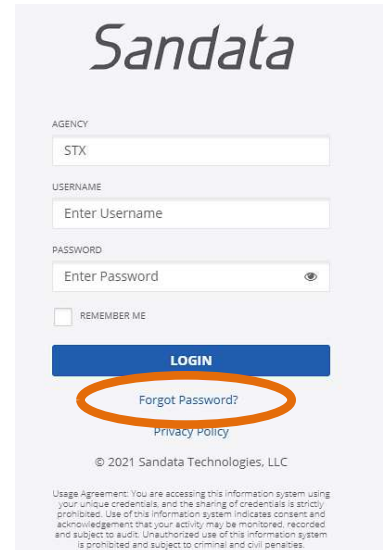
- Portal users can reset or change their own password, if their account is not locked.
- Three unsuccessful attempts to login will lock the user out of the Sandata EVV Portal.
- The user can click the eye  icon to see the password as entered and ensure it is correct.
- Another security admin user or EVV Customer Care can unlock a portal user account if needed.

47

- Any of the portal users can change or reset their own password if their account is not locked.
- Three unsuccessful attempts to login will lock the user out of the Sandata EVV Portal.
- The user can click the eye icon to see the password as entered and ensure it is correct.
- Another agency security admin user or EVV Customer Care can unlock a Portal user account.

Reset Own Sandata EVV Portal Password

- If you cannot remember your password, click **Forgot Password?** to reset.



The image shows the Sandata EVV Portal login interface. At the top is the 'Sandata' logo. Below it are input fields for 'AGENCY' (with 'STX' entered), 'USERNAME' (with 'Enter Username' placeholder), and 'PASSWORD' (with 'Enter Password' placeholder and a toggle icon). There is a 'REMEMBER ME' checkbox. A blue 'LOGIN' button is present. Below the button, the text 'Forgot Password?' is circled in orange, and 'Privacy Policy' is a link below it. At the bottom, there is a copyright notice '© 2021 Sandata Technologies, LLC' and a small 'Usage Agreement' text.

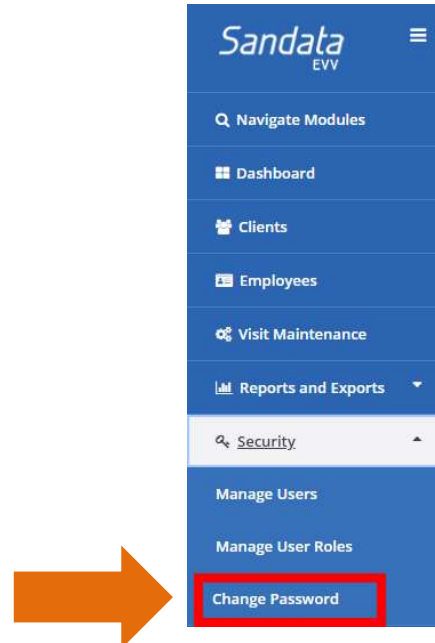
48

If you forgot your password for the EVV Portal, click “Forgot Password?” to reset it. This is better than risking the account being locked after unsuccessful attempts.

Reset Own Sandata EVV Portal Password

Any Sandata EVV Portal user can also change their own password once logged in:

- Click **Security**.
- Select **Change Password** from the drop-down menu.

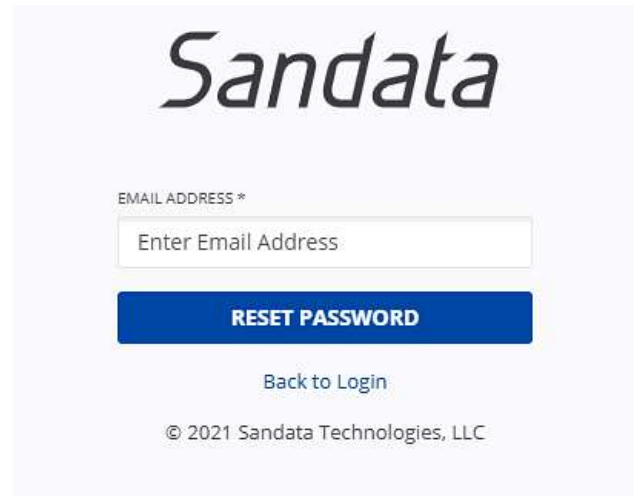


49

A password can also be reset once you've logged in to the portal. Any portal user can go to the Security module and select Change Password to do this.

Reset Own Sandata EVV Portal Password

- Enter email address.
- Click **Reset Password**.
- Sandata will send an email to the email address entered with a temporary password.

The screenshot shows the Sandata EVV Portal password reset interface. At the top, the 'Sandata' logo is displayed in a large, italicized, dark blue font. Below the logo, the text 'EMAIL ADDRESS *' is shown in a small, dark blue font. Underneath this text is a white input field with the placeholder text 'Enter Email Address' in a light gray font. Below the input field is a prominent blue button with the text 'RESET PASSWORD' in white, uppercase letters. Below the button is a link that says 'Back to Login' in a small, dark blue font. At the bottom of the form, the copyright notice '© 2021 Sandata Technologies, LLC' is displayed in a small, dark blue font.

50

Whichever way you need to reset your password, this next step is the same: A screen will pop up needing your email address.

- Enter **Email** address. (Remember, the email address is the same as your username. If you have several email addresses, be sure to enter the correct one.).
- Click **Reset Password**.
- Sandata will send an email to the email address entered with a temporary password.

Reset Own Sandata EVV Portal Password

- Copy the temporary password.
- Click **Login** within the email. This will open the Sandata EVV Portal.



Hi wiinstructor2@mailinator.com,
Your Sandata.evv temporary password is:
B*y6w7^G{K4g

Please click below to login to Sandata.evv and change your password..

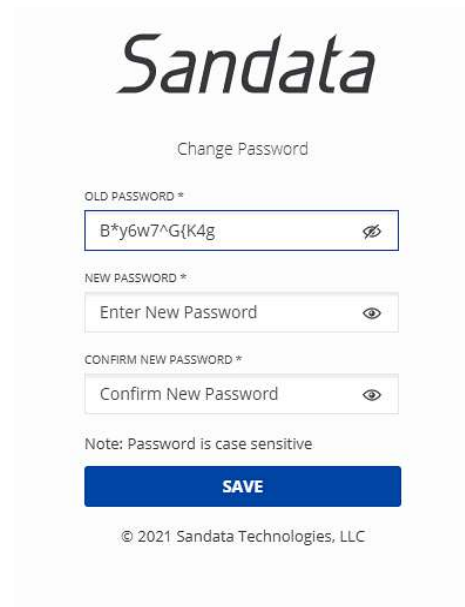
Login

Sandata.evv © operates under U.S. Patent Nos. 5,835,575 and 5,949,856, which are owned by Sandata Technologies, LLC Copyright ©2017 Sandata Technologies, LLC. All rights reserved. Customer Support Number : 516-484-4400

Here's what the email will look like. Be sure to copy the temporary password, then click Login.

Reset Own Sandata EVV Portal Password

- Enter the temporary password (from the email) in the Old Password field. Passwords are case sensitive.
- Enter a new password in the New Password field; enter it again in the Confirm New Password field.
- Click **Save**.



The screenshot shows the Sandata EVV Portal password reset interface. At the top is the Sandata logo. Below it is the heading "Change Password". There are three input fields: "OLD PASSWORD *" containing the text "B*y6w7^G(K4g", "NEW PASSWORD *" with the placeholder "Enter New Password", and "CONFIRM NEW PASSWORD *" with the placeholder "Confirm New Password". Each field has an eye icon to toggle visibility. Below the fields is a note: "Note: Password is case sensitive". At the bottom is a blue "SAVE" button and a copyright notice: "© 2021 Sandata Technologies, LLC".

52

Enter the temporary password (from the email) in the Old Password field. Passwords are case sensitive.

Enter a new password in the New Password field; enter it again in the Confirm New Password field.

Click **Save**.

Tip: Clicking the eye in the password box will allow you to see what is being typed.

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Resources

Know that we are here to help, and provider agencies have many resources available.

Resources

- EVV Customer Care:
 - Phone: 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.
 - Email: VDXC.ContactEVV@wisconsin.gov
- EVV webpage at www.dhs.wisconsin.gov/evv/index.htm for information about:
 - ♦ Training resources
 - ♦ EVV in Wisconsin

54

Our EVV Customer Care team is here to help and can be reached by calling: 833-931-2035, Monday–Friday, from 7 a.m.–6 p.m.

Or by Email support at: VDXC.ContactEVV@wisconsin.gov

And our EVV webpage at www.dhs.wisconsin.gov/evv/index.htm for information about:

Training resources

EVV in Wisconsin

Thank You

Thank you for the important services you provide to members.



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