

# Electronic Visit Verification: Sandata Portal Security



# Overview Objectives

- Define key terminology
- Create and manage portal users
- Create and manage portal user roles
- Change a user's password



# Key Terminology

- Administrator—The person at the agency with the ability to create new users, assign roles and system privileges, and reset passwords
- Client—A member/participant who receives services through Wisconsin Medicaid
- Privilege—A single permission within the Sandata EVV Portal



# Key Terminology (Cont.)

- **Role**—A group of privileges (permissions) assigned to the user that allows the user to perform visit activities in Sandata EVV Portal
- **Security**—The module in Sandata EVV Portal where users (office staff) are set up to use the system



# Key Terminology (Cont.)

- User—A person with a unique login and password to Sandata EVV Portal
- Username—The user's email address



# EVV Portal Security

- The provider agency's lead contact listed on the secure ForwardHealth Portal should be the first individual to take the EVV training.
- This person will be assigned the role of security administrator for the Sandata EVV Portal.
- The provider agency administrator listed in the ForwardHealth portal will receive the Sandata Welcome e-mail with information to access Sandata EVV Portal.
- At least two portal security administrators are recommended per provider agency to maintain coverage if the administrator is unavailable or to prevent being locked out of the Sandata EVV Portal.

# EVV Portal Security (Cont.)

- The security administrator should assign other administrative employees to Sandata EVV Portal user roles. This is done within an employee profile on the Sandata EVV Portal.
- When deleting or editing any data within the Manage User Roles option, keep in mind any changes may affect user access throughout the provider agency.

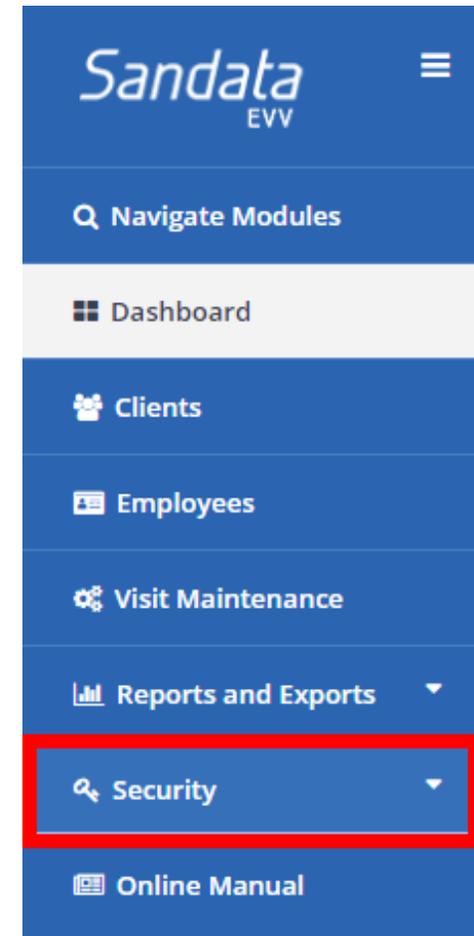
# EVV Portal Security Settings

The security settings allow security administrators to:

- Assign roles to specific users.
- Create user roles.
- Assign system privileges to roles.
- Grant and revoke system privileges.
- Reset user passwords.
- Reset own password.

# Accessing Portal Security Settings

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



# Accessing Portal Security Settings (Cont.)



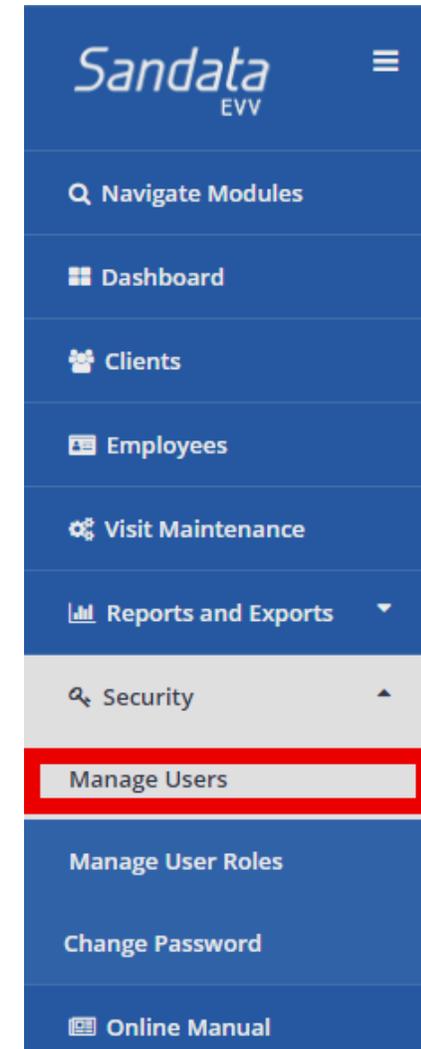
- 1. Manage Users**—Allows the user to create and maintain users.
- 2. Manage User Roles**—Allows the system administrator to group privileges and assign them to users of the EVV system.
- 3. Change Password**—Allows the logged in user to change their own password.



# Creating an EVV Portal User

# Creating an EVV Portal User: Searching for User

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



# Creating an EVV Portal User: Searching for User (Cont.)

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

User Management Security / Manage Users

Select a User **CREATE USER**

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USERNAME

FIRST NAME

LAST NAME

# Creating an EVV Portal User: Creating a New User

### 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\_COOR
- 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: Extraneous Calls
- Acknowledge exception: GPS Distance Exception
- Acknowledge exception: Invalid Contract / Payer

**ASSIGNED PRIVILEGES**

# Creating an EVV Portal User: Creating a New User (Cont.)

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

User Management Security / Manage Users

Create User CREATE USER

USERNAME/EMAIL \*

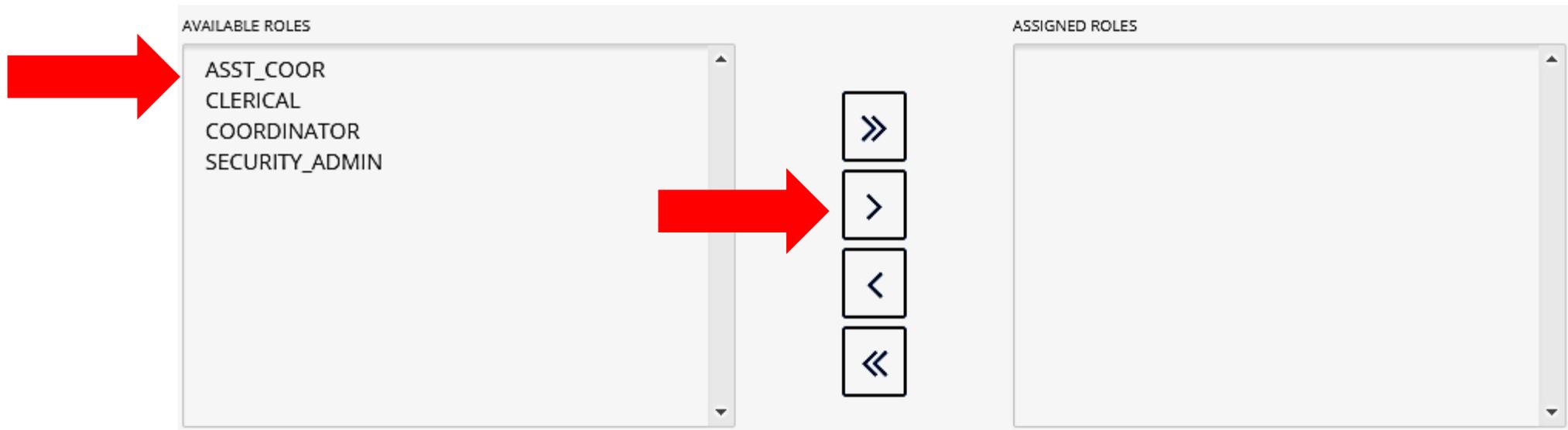
CONFIRM USERNAME/EMAIL \*

LAST NAME \*

FIRST NAME \*

# Creating an EVV Portal User: Creating a New User (Cont.)

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



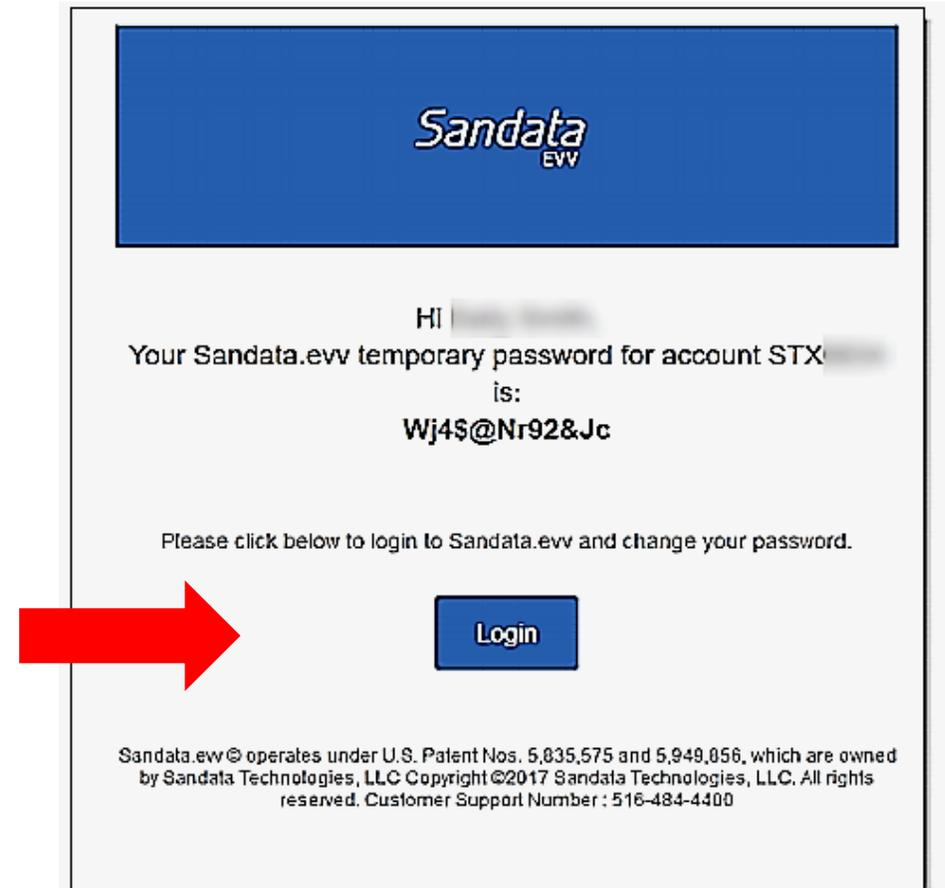
# Creating an EVV Portal User: Creating a New User (Cont.)

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



# Creating an EVV Portal User: Creating a New User (Cont.)

- Use the temporary password that Sandata EVV will send to the email address entered during the user set up.
- Click **Login** and set the permanent password.



# Creating a New User Demonstration



# Modifying a Portal User Security

# Modifying a Portal User Security: Unlocking a User Account

- Perform a user search. (Refer to slides 12–13 to review steps.)
- Click **Edit**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The **Modify User** screen will be displayed.

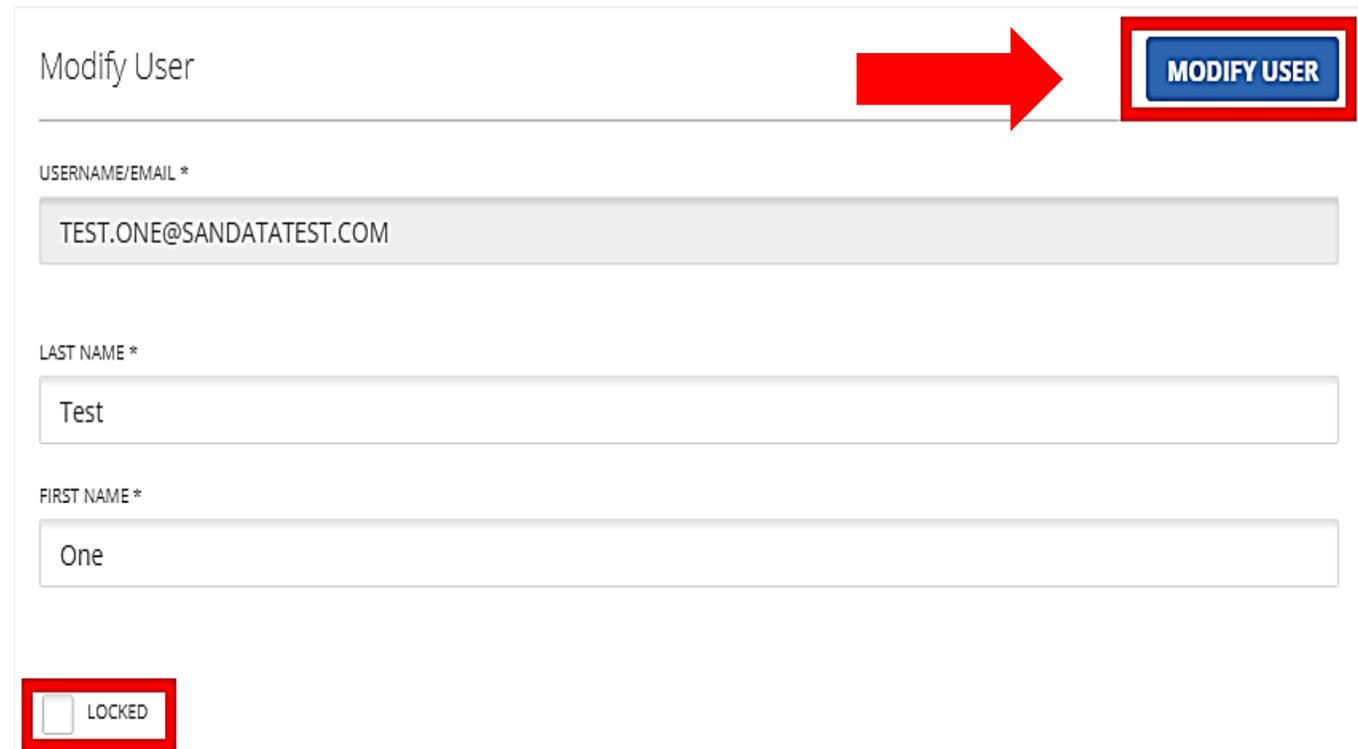


Username	User Type	Account Status	First Name	Last Name	Actions
TEST.ONE@SANDATATEST.COM	ADMIN	OPEN	One	Test	 

Showing 1 to 1 of 1 entries

# Modifying a Portal User Security: Unlocking a User Account (Cont.)

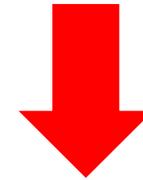
- When the **Locked** box is checked, the user is locked out of the EVV Portal.
- To unlock the account, uncheck the **Locked** box.
- Click **Modify User**. A successful confirmation message will be displayed.



The screenshot shows a web form titled "Modify User". At the top right, there is a blue button labeled "MODIFY USER" with a red arrow pointing to it. Below the title, there are three input fields: "USERNAME/EMAIL \*" containing "TEST.ONE@SANDATATEST.COM", "LAST NAME \*" containing "Test", and "FIRST NAME \*" containing "One". At the bottom left, there is a checkbox labeled "LOCKED" which is currently checked, with a red arrow pointing to it.

# Modifying a Portal User Security: Resetting a Password

- Perform a user search.
- Click **Edit**  in the Actions column on the right-hand side of the screen of the appropriate user. The **Modify User** screen will be displayed.



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

# Modifying a Portal User Security: Resetting a Password (Cont.)

- Click the **Reset Password** button.

The screenshot displays the 'User Management Security / Manage Users' interface. On the left, the 'Modify User' form includes fields for 'USERNAME/EMAIL \*' (TEST.ONE@SANDATATEST.COM), 'LAST NAME \*' (Test), and 'FIRST NAME \*' (One). A 'LOCKED' checkbox is also present. A blue 'MODIFY USER' button is at the top right of the form, and a blue 'RESET PASSWORD' button is at the bottom right. A red arrow points from the 'RESET PASSWORD' button to a 'Reset Password' dialog box on the right. The dialog box asks 'Are you sure you want to reset password for this user?' and has 'CANCEL' and 'OK' buttons. A red arrow points from the 'OK' button to a green success message box at the bottom right that reads 'Success Email with temporary password sent to user.'

# Modifying a Portal User Security: Adding or Removing User Roles

- Perform a user search.
- Click **Edit**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The **Modify User** screen will be displayed.



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

# Modifying a Portal User Security: Adding or Removing User Roles (Cont.)

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

The screenshot shows a 'Modify User' form with the following fields and controls:

- Modify User** (Page Title)
- MODIFY USER** (Button, highlighted with a red box and a red arrow pointing to it from the right)
- USERNAME/EMAIL \*** (Text input field containing 'TEST.ONE@SANDATATEST.COM')
- LAST NAME \*** (Text input field containing 'Test')
- FIRST NAME \*** (Text input field containing 'One')
- LOCKED**
- RESET PASSWORD** (Button)
- AVAILABLE ROLES** (List box containing: CLERICAL, COORDINATOR, SECURITY\_ADMIN)
- ASSIGNED ROLES** (List box containing: ASST\_COOR)
- Between the role boxes are four arrow buttons: >>, >, <, and <<. The middle two buttons (> and <) are highlighted with a red box and a red arrow pointing to them from below.

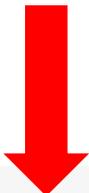
# **Modifying a Portal User Account Demonstration**



# Deleting an EVV Portal User Account

# Deleting an EVV Portal User Account

- Perform a user search.
- Click **Delete**  under the **Actions** column on the right-hand side of the screen of the appropriate user. The **Delete User** confirmation box will be displayed.

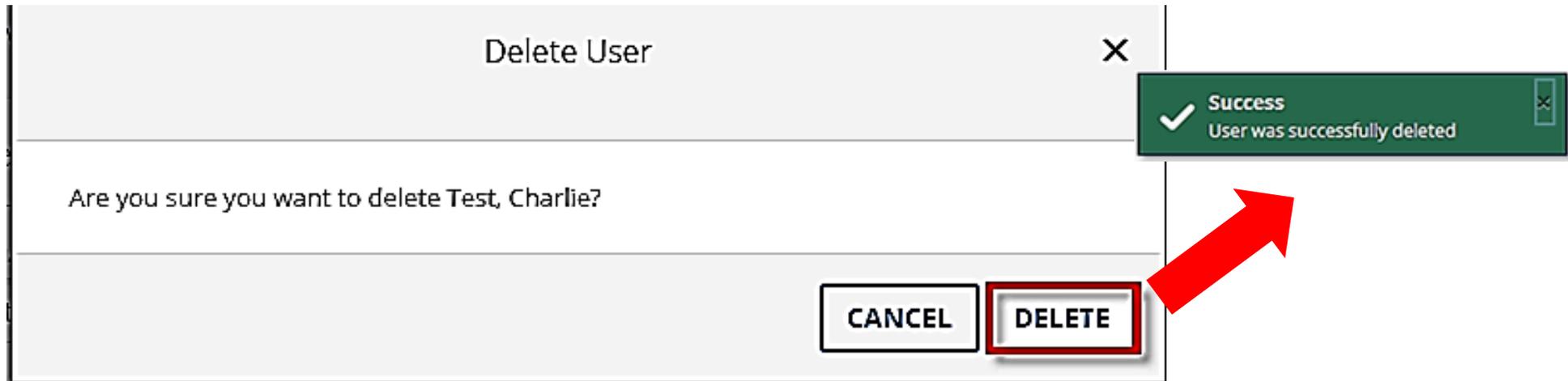


Username	User Type	Account Status	First Name	Last Name	Actions
TEST.ONE@SANDATATEST.COM	ADMIN	OPEN	One	Test	 

Showing 1 to 1 of 1 entries

# Deleting a Portal User Account (Cont.)

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



# Deleting a User Demonstration



# Managing EVV Portal Security Roles

# Managing EVV Portal Security Roles

- Roles allow security administrators to tailor a set of system functions for each job title in the organization.
- Editing a role will affect all users who have been assigned that role.
- Sandata has pre-configured roles that cover all functions of the system.

# Managing EVV Portal Security Roles (Cont.)

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

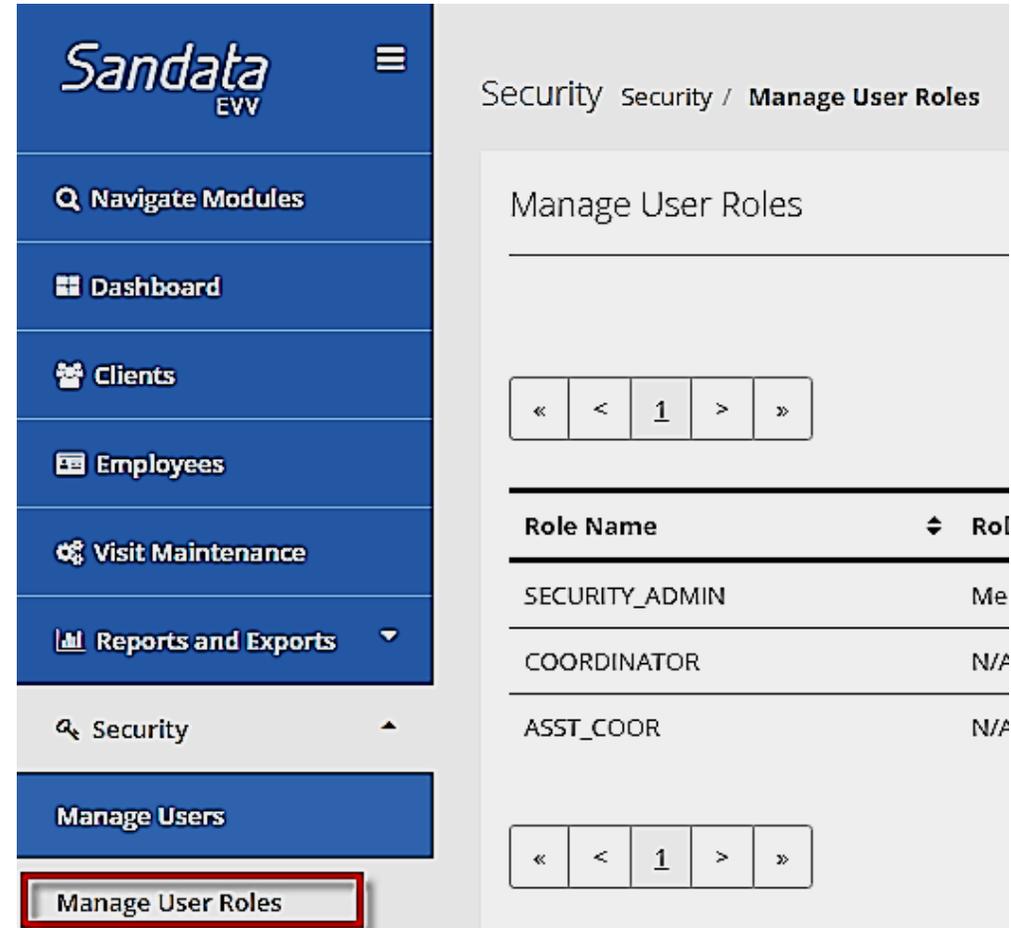
<b>INDIVIDUAL PROVIDER</b>	Limited access view Authorizations from feed, Visit Maintenance(View only) and Reports.
<b>ASST_COORDINATOR</b>	Sandata EVV Portal generalist that supports visit verification and visit reporting
<b>COORDINATOR</b>	Asst_Coor role, plus Intake/manage clients, intake/manage employees.
<b>SECURITY_ADMIN</b>	Coordinator role, plus Agency set up, create and manage all EVV portal users.



# Creating a New Security User Role

# Creating a New Security User Role

- Click **Security**.
- Select **Manage User Roles** from the drop-down menu. The **Manage User Roles** screen will be displayed.



The screenshot shows the Sandata EVV system interface. On the left is a blue navigation menu with the following items: Sandata EVV, Navigate Modules, Dashboard, Clients, Employees, Visit Maintenance, Reports and Exports, Security (expanded), Manage Users, and Manage User Roles (highlighted with a red box). A red arrow points from the 'Manage User Roles' menu item to the right-hand side of the screen. The right-hand side shows the 'Manage User Roles' screen with a breadcrumb trail 'Security / Manage User Roles'. Below the breadcrumb is a table with the following data:

Role Name	Role
SECURITY_ADMIN	Me
COORDINATOR	N/A
ASST_COOR	N/A

There are two pagination controls, each showing page 1 of 1.

# Creating a New Security User Role (Cont.)

- Click the **Create User Role** button.

Manage User Roles

**CREATE USER ROLE**

Show: 10 per page

« < 1 > »

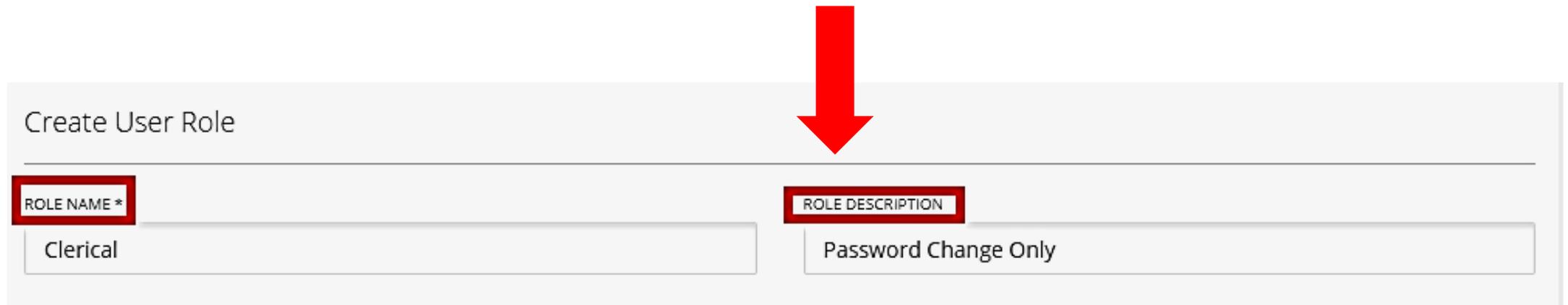
Showing 1 to 4 of 4 entries

Role Name	Role Description	Actions
SECURITY_ADMIN	Members can run SECURITY application	
COORDINATOR	N/A	
ASST_COOR	N/A	
CLERICAL	Reset Passwords Only	



# Creating a New Security User Role (Cont.)

- Enter a role name.
- Enter role description (optional).



The screenshot shows a form titled "Create User Role" with two input fields. The first field is labeled "ROLE NAME \*" and contains the text "Clerical". The second field is labeled "ROLE DESCRIPTION" and contains the text "Password Change Only". A red arrow points from the left towards the "ROLE NAME \*" label, and another red arrow points from above towards the "ROLE DESCRIPTION" label.

Field Label	Value
ROLE NAME *	Clerical
ROLE DESCRIPTION	Password Change Only

# Creating a New Security User Role (Cont.)

- 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 displays the 'Create User Role' interface. At the top, there are two input fields: 'ROLE NAME \*' with the placeholder 'Enter Role Name' and 'ROLE DESCRIPTION' with the placeholder 'Enter Role Description'. Below these are two list boxes: 'AVAILABLE PRIVILEGES' on the left and 'ASSIGNED PRIVILEGES' on the right. The 'AVAILABLE PRIVILEGES' list includes: 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 a red arrow points upwards from below the interface towards the bottom-most arrow button. At the bottom right of the interface is a blue button labeled 'CREATE USER ROLE', which is also highlighted with a red box.

# Creating a New Security User Role (Cont.)

- A successful confirmation message will be displayed.



# Creating a New Security User Role Demonstration



# Modifying EVV Portal Security User Roles

# Modifying EVV Portal Security User Roles

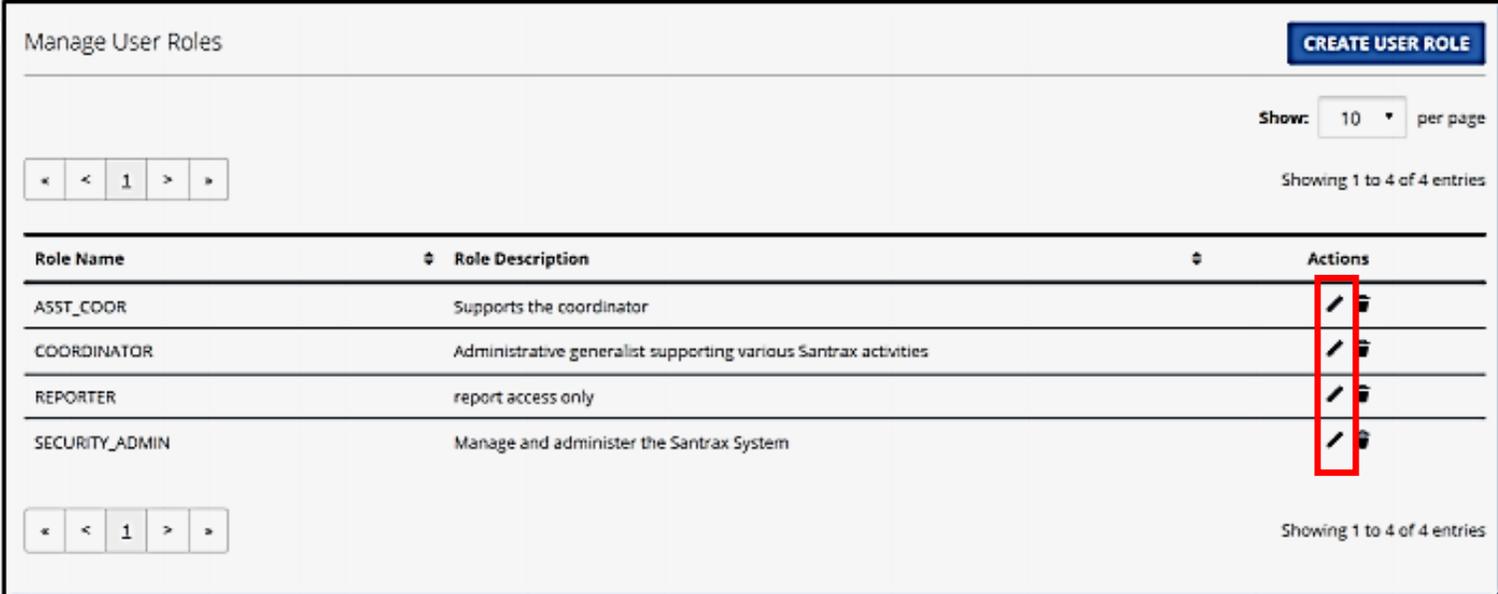
- Click **Security**.
- Select **Manage User Roles** from the drop-down menu.

The screenshot shows the Sandata EVV portal interface. On the left is a blue navigation menu with the following items: Sandata EVV, Navigate Modules, Dashboard, Clients, Employees, Visit Maintenance, Reports and Exports, Security, Manage Users, and Manage User Roles. A red arrow points to the 'Manage User Roles' item. The main content area shows the 'Manage User Roles' page with a breadcrumb trail 'Security / Manage User Roles'. Below the breadcrumb is a table with the following data:

Role Name	Role
SECURITY_ADMIN	Me
COORDINATOR	N/A
ASST_COOR	N/A

# Modifying EVV Portal Security User Roles (Cont.)

- Scroll through the list of roles and select the role to be edited.
- Click **Edit**  in the Actions column on the right-hand side of the screen of the appropriate role

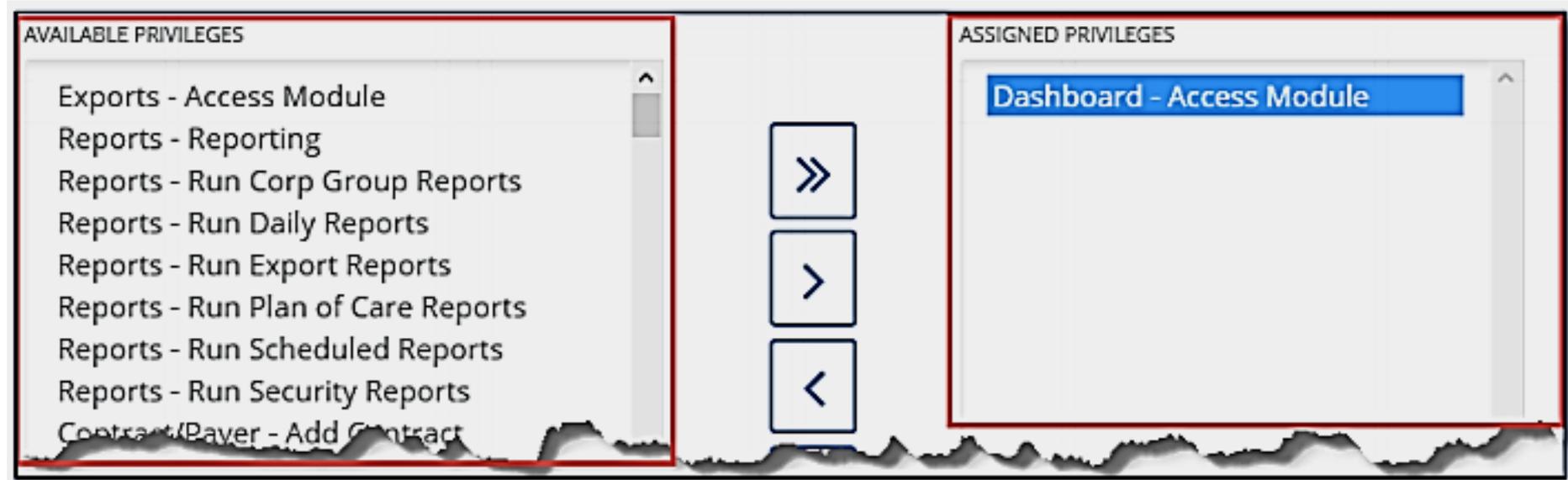


Role Name	Role Description	Actions
ASST_COOR	Supports the coordinator	 
COORDINATOR	Administrative generalist supporting various Santrax activities	 
REPORTER	report access only	 
SECURITY_ADMIN	Manage and administer the Santrax System	 



# Modifying EVV Portal Security User Roles (Cont.)

- Add available privileges or remove assigned privileges as necessary.



# Modifying EVV Portal Security User Roles (Cont.)

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



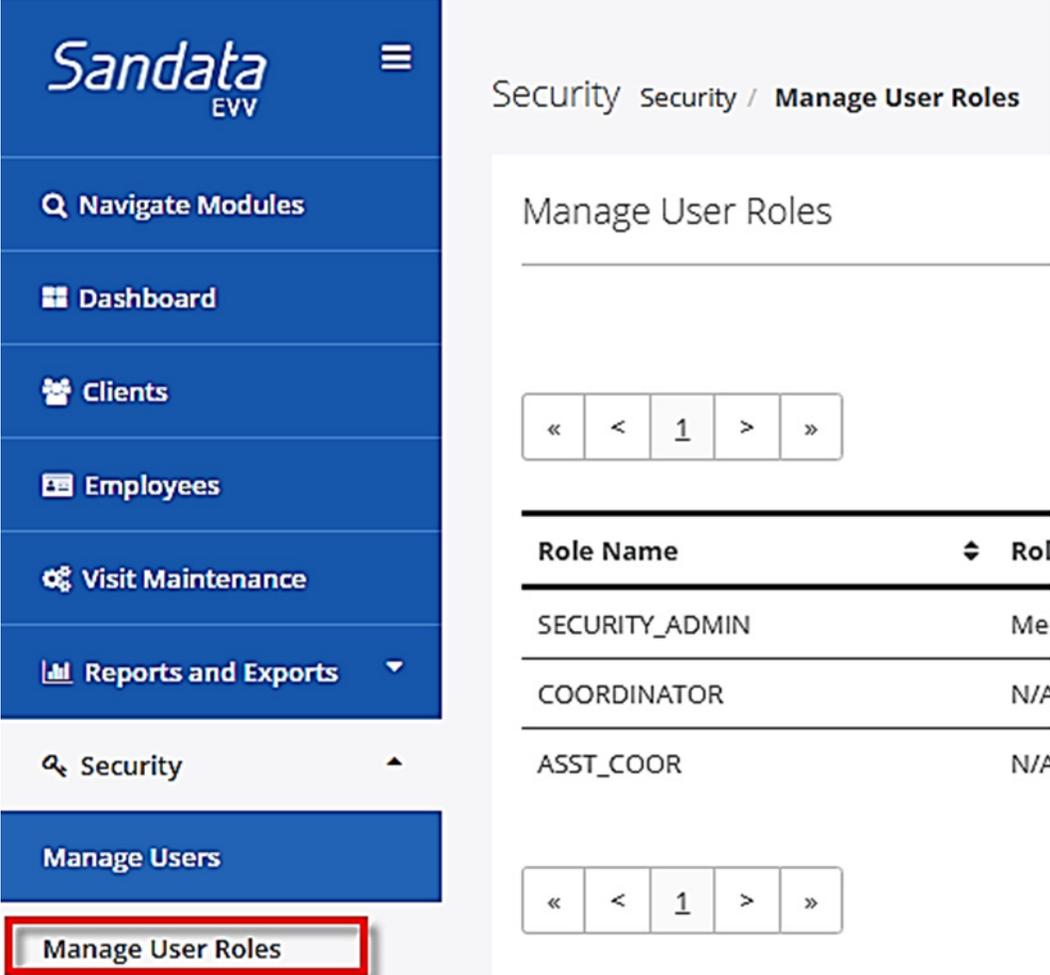
# **Modifying EVV Portal Security User Roles Demonstration**



# Deleting EVV Portal Security User Roles

# Deleting EVV Portal Security User Roles

- Click **Security**.
- Select **Manage User Roles** from the drop-down menu.
- Select **Security Role** to make changes.

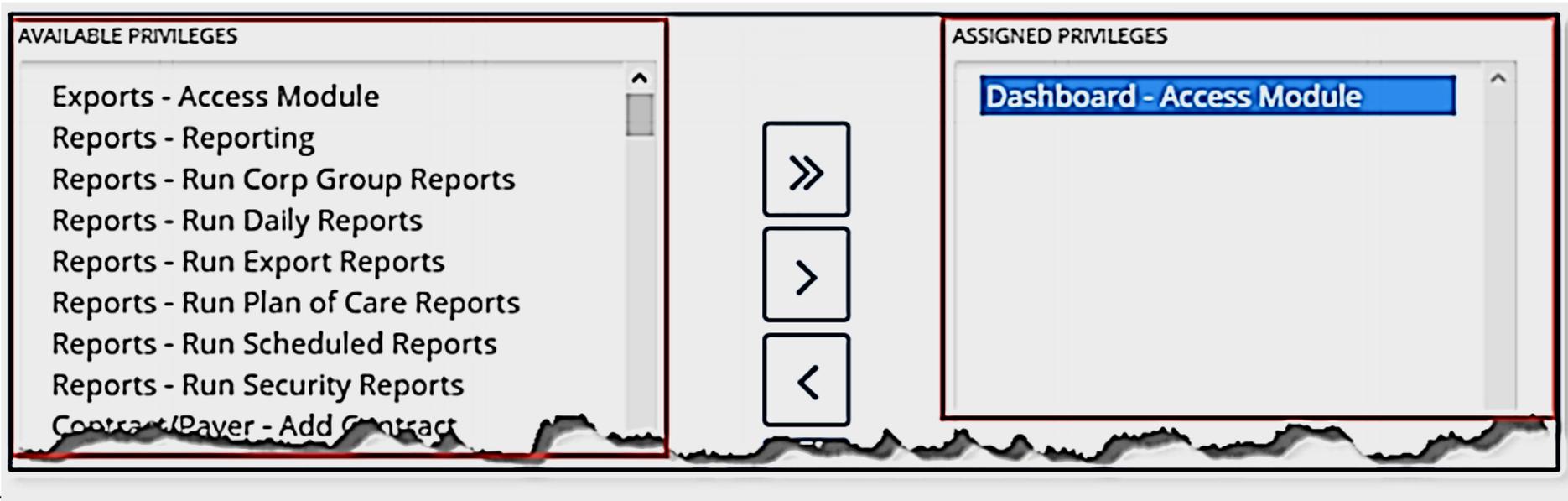


The screenshot shows the Sandata EVV portal interface. The left-hand navigation menu is expanded, showing options like 'Navigate Modules', 'Dashboard', 'Clients', 'Employees', 'Visit Maintenance', 'Reports and Exports', 'Security', 'Manage Users', and 'Manage User Roles'. A red arrow points to the 'Manage User Roles' option. The main content area displays the 'Manage User Roles' page, which includes a table of roles and their associated roles.

Role Name	Role
SECURITY_ADMIN	Me
COORDINATOR	N/A
ASST_COOR	N/A

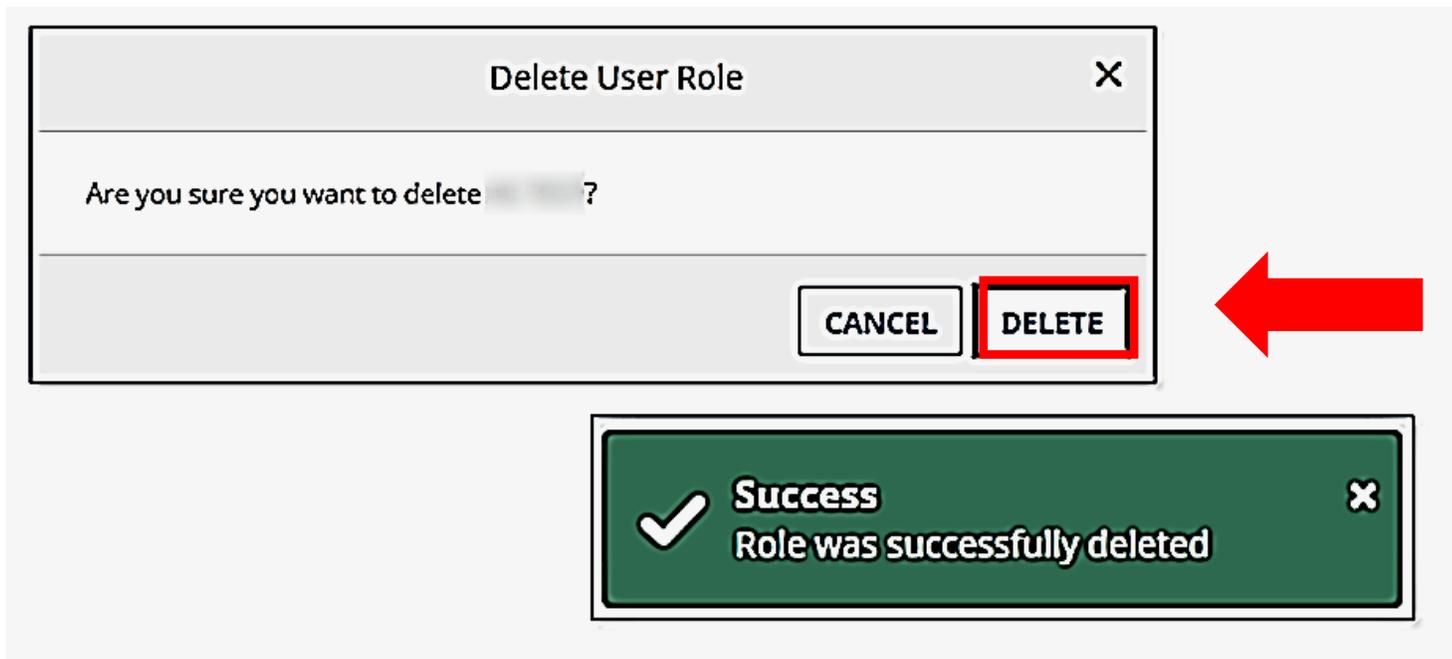
# Deleting EVV Portal Security User Roles (Cont.)

- Scroll through the list of roles and select the role to be deleted.
- Click **Delete** in the **Actions** column on the right-hand side of the screen of the appropriate role. The **Delete User Role** confirmation message will be displayed.



# Deleting EVV Portal Security User Roles (Cont.)

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



The screenshot shows a 'Delete User Role' dialog box with a close button (X) in the top right corner. The main text asks, 'Are you sure you want to delete [redacted] ?'. At the bottom right of the dialog are two buttons: 'CANCEL' and 'DELETE'. The 'DELETE' button is highlighted with a red border, and a red arrow points to it from the right. Below the dialog box is a green success message box with a checkmark icon, containing the text 'Success Role was successfully deleted' and a close button (X) in the top right corner.

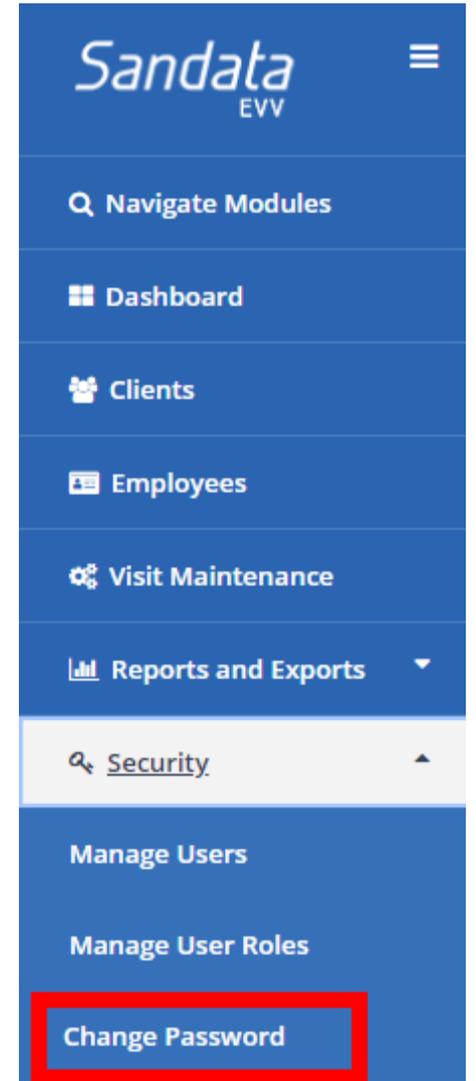
# **Deleting EVV Portal Security User Roles Demonstration**



# Resetting a User's Own EVV Portal Password

# Resetting a User's Own EVV Portal Password

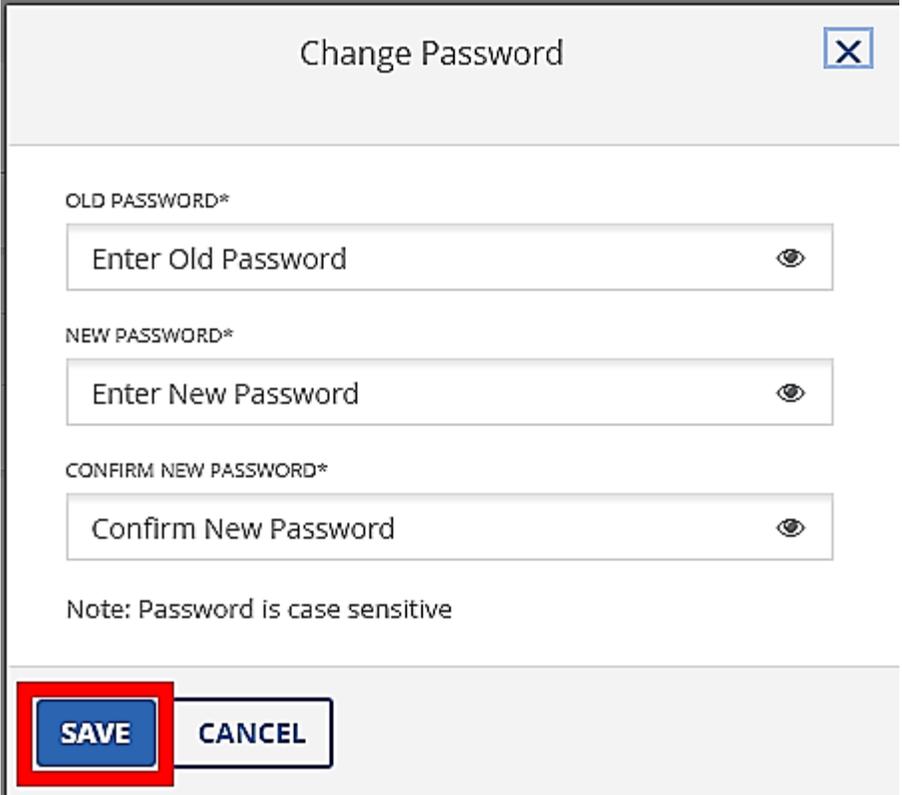
- Click **Security**.
- Select **Change Password** from the drop-down menu. The **Change Password** panel will be displayed.



The screenshot shows the Sandata EVV portal navigation menu. The menu is a vertical list of items on a blue background. At the top is the Sandata EVV logo and a hamburger menu icon. Below the logo is a search bar labeled 'Navigate Modules'. The menu items are: Dashboard, Clients, Employees, Visit Maintenance, Reports and Exports (with a dropdown arrow), Security (with an upward arrow), Manage Users, Manage User Roles, and Change Password. The 'Change Password' item is highlighted with a red rectangular box. A large red arrow points from the left towards the 'Change Password' item.

# Resetting a User's Own EVV Portal Password (Cont.)

- Enter the current password in the Old Password field. Passwords are case sensitive.
- Enter the new password in the New Password field; enter it again in the Confirm New Password field.
- Click **Save**.



The screenshot shows a 'Change Password' dialog box with three input fields: 'OLD PASSWORD\*', 'NEW PASSWORD\*', and 'CONFIRM NEW PASSWORD\*'. Each field has a placeholder text and a toggle icon. Below the fields is a note: 'Note: Password is case sensitive'. At the bottom, there are two buttons: 'SAVE' and 'CANCEL'. A red arrow points to the 'SAVE' button.

# **Resetting a User's Own EVV Portal Password Demonstration**



# Resources

# Resources

- EVV Customer Care at 833-931-2035
  - Hours **prior** to September 14, 2020: Monday–Friday, 8 a.m. – 5 p.m.
  - Hours **after** September 14, 2020: Monday–Friday, 7 a.m. – 6 p.m.
- Email support at [VDXC.ContactEVV@wisconsin.gov](mailto:VDXC.ContactEVV@wisconsin.gov)
- EVV webpage at <https://www.dhs.wisconsin.gov/evv/index.htm>  
for information about:
  - Training Resources
  - EVV in Wisconsin
  - The ForwardHealth Portal

# Questions





**Thank  
You**