

Electronic Visit Verification: Sandata EVV Portal Security

P-02748 (01/2025)



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

Objectives

- Review security administrator access
- Create, modify, and delete Sandata EVV Portal user
- Create, modify, and delete Sandata EVV Portal user roles
- Reset own Sandata EVV Portal password

Here are our objectives today:

- Review Security Administrator access
- Create, modify, and delete Sandata EVV Portal user
- Create, modify, and delete Sandata EVV Portal user roles
- Reset your own Sandata Electronic Visit Verification (EVV) Portal password

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.

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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.

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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.

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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 their ForwardHealth Portal account 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.

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- The provider's EVV administrator should be the first individual to take EVV training.
- The provider's "mail to" email listed in their ForwardHealth Portal account 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»

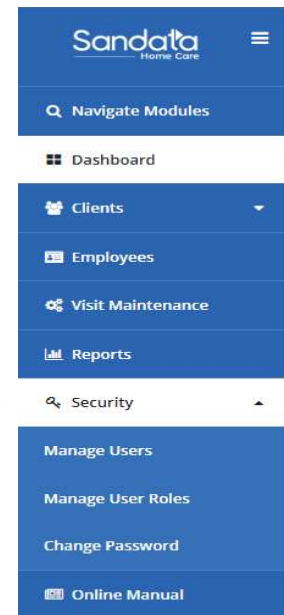
- Change your password.

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.



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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.



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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

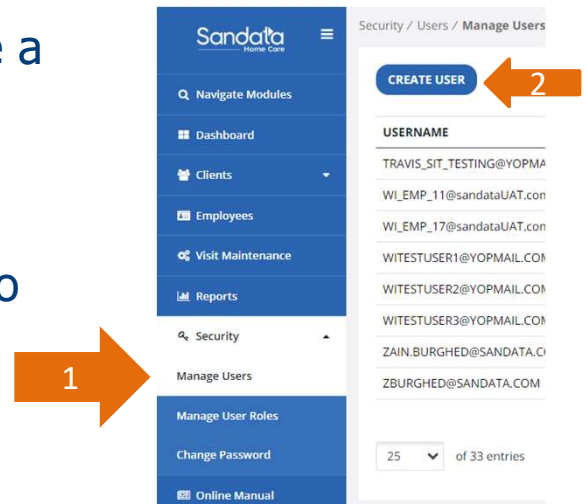
The Manage Users function sets up new Sandata EVV Portal administrative users. The security administrator will create a user and then assign user roles based on what function that user will need access to. If you are an independent nurse (an agency of one), think through your backups in your business 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. After a pause to load, all current users will show.
- Click **Create User** if a new user needs to be added.



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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 the "Manage Users" option available.

- Click **Security**.
- Select **Manage Users** from the drop-down menu. After a brief pause, all current users will show on the screen.
- Click **Create User** if a new user needs to be added to the list.

Create Sandata EVV Portal User

The Create User screen will be displayed.

Create User CREATE USER

* indicates required field

Username/Email *
Enter Username/Email

Username/Email Confirmation *
Enter Username/Email Confirmation

Last Name *
Enter Last Name

First Name *
Enter First Name

Locked ☐

Available Roles
Search roles...

- ASST_COOR
- COORDINATOR
- CUSTOMER_OR_DESIGNEE
- PVW_ADMIN_ROLE
- INDIVIDUAL_PROVIDER
- NON-AGENCY_PROVIDER
- SECURITY_ADMIN

Assigned Roles
Search roles...

Available Privileges
Search privileges...

- ACKNOWLEDGE EXCEPTION: CLIENT SIGNATURE EXCEPTION
- ACKNOWLEDGE EXCEPTION: LOCATION REQUIRED
- ACKNOWLEDGE EXCEPTION: MISSING SERVICE
- ACKNOWLEDGE EXCEPTION: SERVICE VERIFICATION EXCEPTION

Assigned Privileges
Search privileges...

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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 in the Sandata EVV Portal.
- Enter user's first and last name.

Create User

CREATE USER

* indicates required field

Username/Email * Enter Username/Email	Username/Email Confirmation * Enter Username/Email Confirmation
Last Name * Enter Last Name	First Name * Enter First Name

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All fields with an asterisk are required.

Enter the user's unique email address; this will become their username in the Sandata EVV Portal. The email address 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. Enter user's first and last name.

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.

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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.

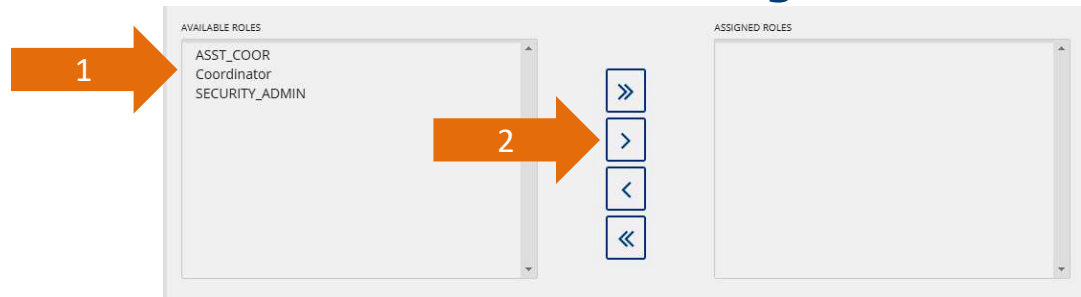
What a role can do builds as you go down this list. For example, the Coordinator role will have Asst_Coordinator privileges plus specific Coordinator privileges. The Security Admin role has access to all privileges. These Sandata provided roles cannot be modified.

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

Create Sandata EVV Portal User

Assign roles for the user in the Sandata EVV Portal. There are pre-configured roles available.

- Click on a role to select it.
- Click the > button to move it into the **Assigned Roles** box.



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Assign roles for the user in the Sandata EVV Portal. There are pre-configured roles available, and later we'll look at how to add customized roles.

- Click on the role to select it.
- 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 assign more than one role to a user if desired.

Create Sandata EVV Portal User

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

The screenshot displays the 'Assign Supervisors to User' interface. On the left, there is a section titled 'Assign Supervisors to User' with a checked checkbox labeled 'ALL' and four navigation buttons: '>>', '>', '<', and '<<'. To the right of these buttons is a large, empty rectangular box labeled 'ASSIGNED SUPERVISORS'. An orange arrow points from the bottom of this box to a blue button labeled 'CREATE USER'. Below the 'CREATE USER' button, a green confirmation message box is visible, containing a checkmark icon, the word 'Success', and the text 'User was successfully created.' with a close button (X) in the top right corner.

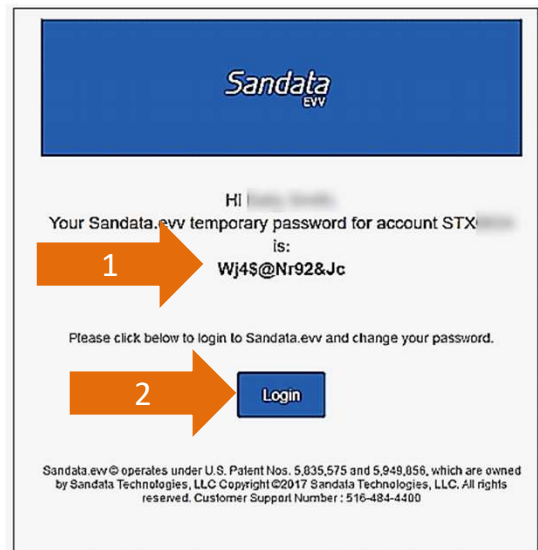
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Click **Create User**. A confirmation message will display.

Create Sandata EVV Portal User

Sandata will send an email to the user's email address. The new user can finish setting up their Sandata EVV Portal account:

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



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Once an additional user is 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 Sandata EVV Portal.

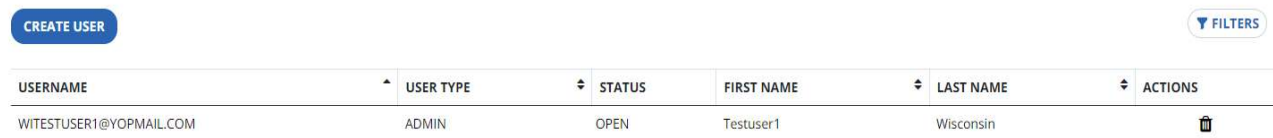
They can then reset their Sandata EVV Portal password.


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 the user's row to edit the user's account.



USERNAME	USER TYPE	STATUS	FIRST NAME	LAST NAME	ACTIONS
WITESTUSER1@YOPMAIL.COM	ADMIN	OPEN	Testuser1	Wisconsin	

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

If a user attempts to log in 5 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. EVV Customer Care can also help with this.

The security admin can find the user, just as we did before. Then click on the user's row to edit the user's account.

Modify Sandata EVV Portal User: Unlock User

When the **Locked** box is checked.

- Uncheck the **Locked** box to unlock an account.
- Click **Save Changes**. A successful confirmation message will be displayed.

The screenshot shows the 'Modify User' form. At the top left is a '< BACK' link. The title 'Modify User' is at the top. A red asterisk indicates required fields. The form contains the following fields: 'Username/Email *' with the value 'WITESTUSER1@YOPMAIL.COM'; 'Last Name *' with the value 'Wisconsin'; 'First Name *' with the value 'Testuser1'; a 'Locked' checkbox which is currently checked; 'Available Roles' (empty); and 'Assigned Roles' (empty). There are two buttons: 'SAVE CHANGES' at the top right and 'RESET PASSWORD' below it. Two orange arrows with numbers are overlaid: arrow '1' points to the 'Locked' checkbox, and arrow '2' points to the 'SAVE CHANGES' button.

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

Modify Sandata EVV Portal User: Unlock User

- If needed, click the **Reset Password** button. A Sandata email is automatically sent to the user with a temporary

Modify User SAVE CHANGES

* indicates required field

Username/Email *
WITESTUSER1@YOPMAIL.COM

Last Name *
Wisconsin

First Name *
Testuser1

Locked ☐

RESET PASSWORD

If you also need to reset the password, 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 use the filter options to find the user.
- Click on the row for the appropriate user.

[CREATE USER](#)[FILTERS](#)

USERNAME	USER TYPE	STATUS	FIRST NAME	LAST NAME	ACTIONS
WITESTUSER1@YOPMAIL.COM	ADMIN	OPEN	Testuser1	Wisconsin	

25 of 1 entries

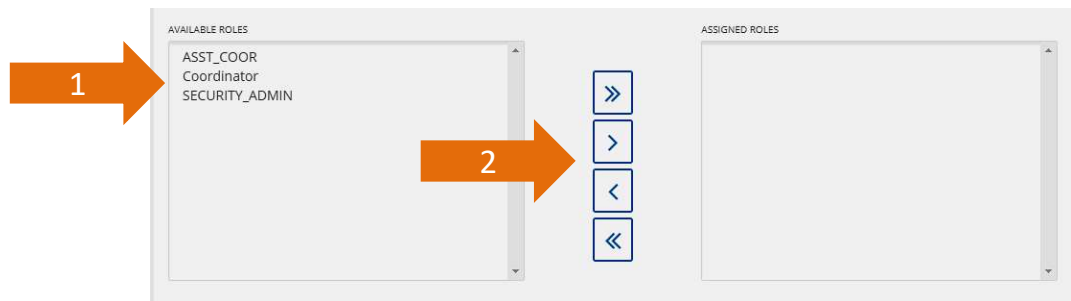
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A second modification that might come up is reassigning roles for users. Again, this is only done by the security admin.

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

Modify Sandata EVV Portal User: Add or Remove User Roles

- Click on a role to select it.
- Use arrows to move it in (>) or out (<) of the box.
- Click **Save Changes**.



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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 Save Changes in the top right to save these changes.

Manage Users: Delete Sandata EVV Portal User

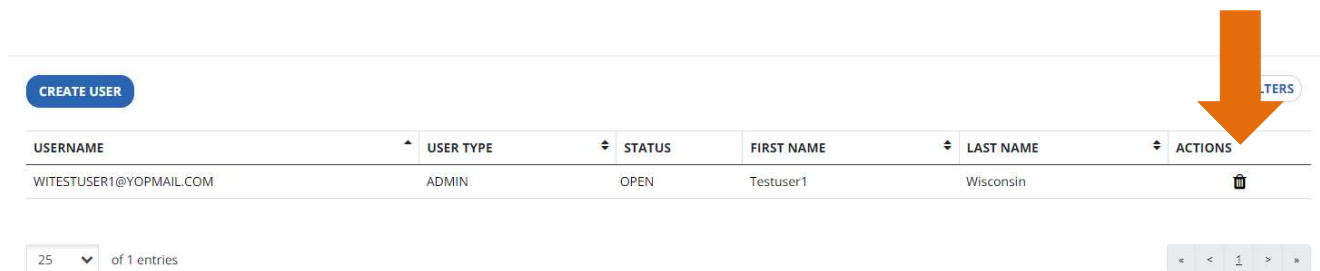
Deleting a user should be used when an administrative staff no longer works for your agency. This step should be considered as part of your “off boarding” procedures that the security admin does.

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 finds the user.
- Click the **Delete** 🗑 icon under the **Actions** column on the right-hand side of the screen of the appropriate user.



CREATE USER FILTERS

USERNAME	USER TYPE	STATUS	FIRST NAME	LAST NAME	ACTIONS
WITESTUSER1@YOPMAIL.COM	ADMIN	OPEN	Testuser1	Wisconsin	🗑

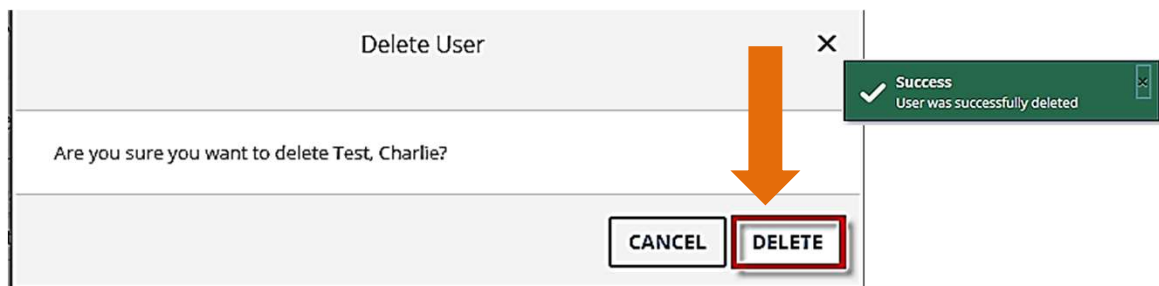
25 of 1 entries

« < 1 > »

As before, the security admin finds the user. This time, the garbage can icon will be used to delete the user. Though it does not delete the user's history.

Delete Sandata EVV Portal User

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



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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.

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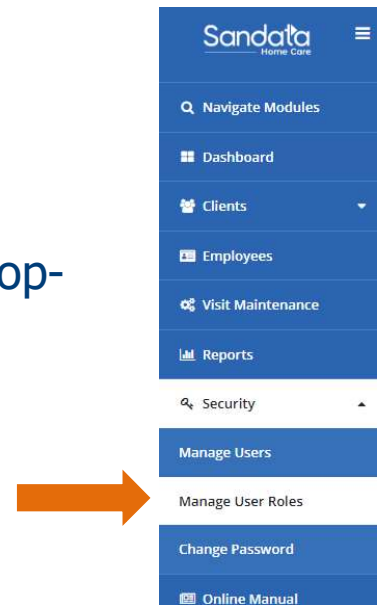
We've already seen the three pre-configured roles within Sandata's EVV Portal: security admin, coordinator, and assistant coordinator. These cannot be modified.

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 administrators:

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



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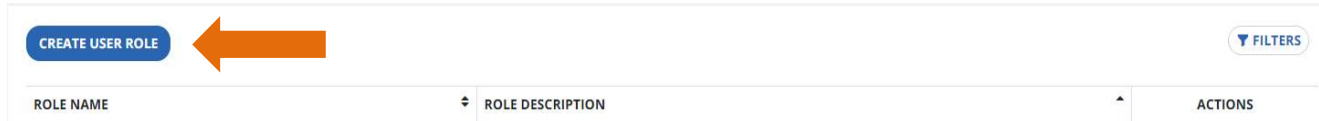
The security administrator can:

Click Security.

This time, select Manage User Roles from the drop-down menu.

Create New Sandata EVV Portal User Roles

Click the **Create User Role** button.



ROLE NAME	ROLE DESCRIPTION	ACTIONS
-----------	------------------	---------

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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" with a "< BACK" link. A red asterisk indicates required fields. An orange arrow labeled "1" points to the "Role Name" field, which contains the text "Clerical". Another orange arrow labeled "2" points to the "Role Description" field, which contains the text "Password Change Only".

< BACK

Create User Role

* indicates required field

1 Role Name *
Clerical

2 Role Description
Password Change Only

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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

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

The screenshot shows the 'Create New Sandata EVV Portal User Roles' interface. It includes the following elements:

- Role Name ***: A text input field containing 'Clerical'.
- Role Description**: A text input field containing 'Password Change Only'.
- Available Privileges**: A list of privileges with a search bar. The list includes:
 - ACKNOWLEDGE EXCEPTION: CLIENT SIGNATURE EXCEPTION
 - ACKNOWLEDGE EXCEPTION: LOCATION REQUIRED
 - ACKNOWLEDGE EXCEPTION: MISSING SERVICE
 - ACKNOWLEDGE EXCEPTION: SERVICE VERIFICATION EXCEPTION
 - ACKNOWLEDGE EXCEPTION: UNAUTHORIZED SERVICE
 - ACKNOWLEDGE EXCEPTION: UNKNOWN CLIENTS
 - ACKNOWLEDGE EXCEPTION: UNKNOWN EMPLOYEES
 - ACKNOWLEDGE EXCEPTION: UNMATCHED CLIENT ID / PHONE
 - ACKNOWLEDGE EXCEPTION: VISIT VERIFICATION EXCEPTION
 - AUTHORIZATIONS MAINTENANCE - ACCESS MODULE
- Assigned Privileges**: A list of privileges with a search bar, currently empty.
- Navigation Arrows**: A set of arrows (double right, single right, single left, double left) between the Available and Assigned Privileges boxes.
- Create User Role Button**: A blue button at the bottom right.

Numbered arrows indicate the steps:

- Arrow 1 points to the 'Available Privileges' list.
- Arrow 2 points to the navigation arrows between the boxes.
- Arrow 3 points to the 'CREATE USER ROLE' button.

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- Click on the privilege(s) to be assigned to the new role in the Available Privileges box.
- Use the arrow to move selected 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.



A confirmation message will be displayed.

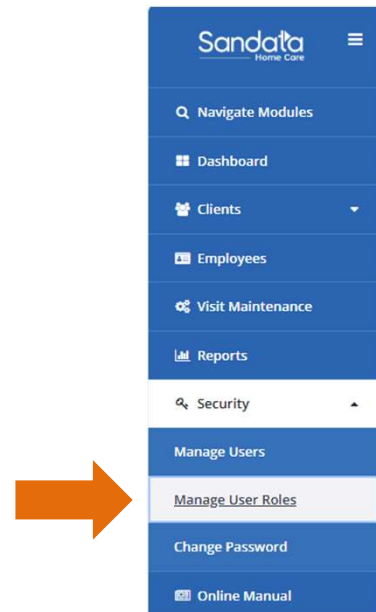
Manage User Roles: Modify Sandata EVV Portal User Role

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 administrators:

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



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The security administrator can:

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.

ROLE NAME	ROLE DESCRIPTION	ACTIONS
CUSTOMER_OR_D	Edit User Role NON-AGENCY PROVIDER	
NON-AGENCY PROVIDER		

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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, two new roles were created and can be modified.

Click on the role's row to select it.

Modify Sandata EVV Portal User Role

Add available privileges or remove assigned privileges as necessary.

Available Privileges

Search privileges ...

ACKNOWLEDGE EXCEPTION: CLIENT SIGNATURE EXCEPTION
ACKNOWLEDGE EXCEPTION: LOCATION REQUIRED
ACKNOWLEDGE EXCEPTION: MISSING SERVICE
ACKNOWLEDGE EXCEPTION: SERVICE VERIFICATION EXCEPTION
ACKNOWLEDGE EXCEPTION: UNAUTHORIZED SERVICE
ACKNOWLEDGE EXCEPTION: UNKNOWN CLIENTS
ACKNOWLEDGE EXCEPTION: UNKNOWN EMPLOYEES
ACKNOWLEDGE EXCEPTION: UNMATCHED CLIENT ID / PHONE
ACKNOWLEDGE EXCEPTION: VISIT VERIFICATION EXCEPTION
AUTHORIZATIONS MAINTENANCE - ACCESS MODULE

Assigned Privileges

Search privileges ...

REPORTS: ACCESS MODULE
VISIT - ASSIGN CALL TO VISIT
VISIT - DELETE VISIT
VISIT - MERGE VISITS
VISIT - UNDO
VISIT - UPDATE ADJUSTED HOURS
VISIT - UPDATE CLIENT
VISIT - UPDATE EMPLOYEE
VISIT - UPDATE KNOWN CLIENT
VISIT - UPDATE KNOWN EMPLOYEE

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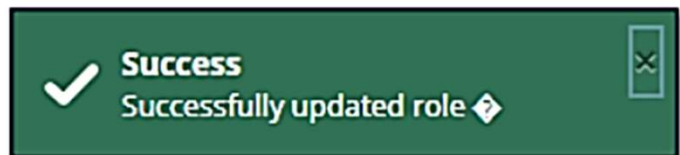
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Just as before, highlight and then add or remove privileges using the arrows.

Modify Sandata EVV Portal User Role

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



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

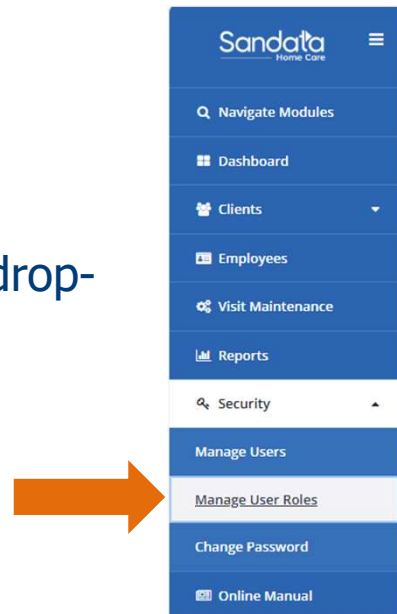
Manage User Roles: Delete Sandata EVV Portal User Role

Now let's see 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.



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The security administrator can:

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.

ROLE NAME	ROLE DESCRIPTION	ACTIONS
CUSTOMER_OR_DESIGNEE		
NON-AGENCY PROVIDER		
INDIVIDUAL PROVIDER	Individual Provider	
SECURITY_ADMIN	Members can run SECURITY application	
EVV_ADMIN_ROLE	Members can start Setup_FOB module	
COORDINATOR	N/A	
ASST_COOR	N/A	

25 of 7 entries

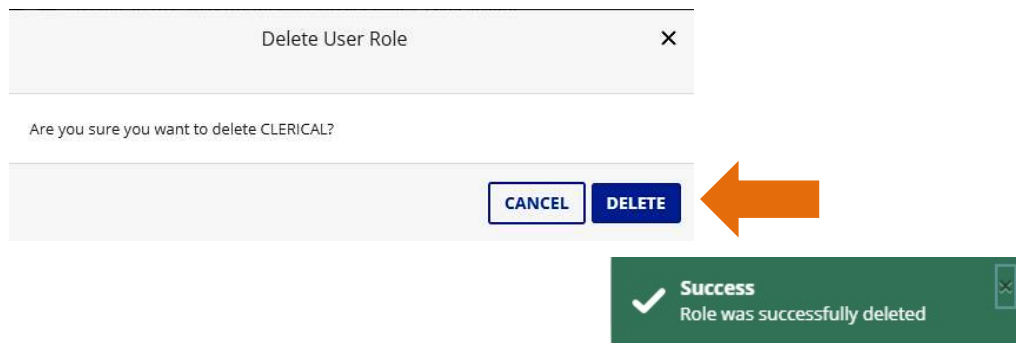


Click the **Delete** (garbage can) icon under the **Actions** column on the right-hand side of the screen of the appropriate role name.

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.



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

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

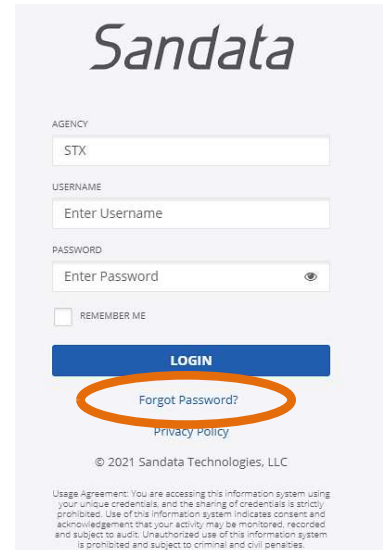
- Sandata EVV Portal users can reset or change their own password, if their account is not locked.
- Five unsuccessful attempts to login will lock the user out of the Sandata EVV Portal.
- The user can click the eye  icon to see the password as entered and ensure it is correct.
- Another security admin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

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- Any of the Sandata EVV Portal users can change or reset their own password if their account is not locked.
- Five 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.
- An agency security admin user or EVV Customer Care can unlock a Sandata EVV 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 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 an eye icon). There is a 'REMEMBER ME' checkbox. A blue 'LOGIN' button is present. Below the button, the text 'Forgot Password?' is circled in orange. Below that is a 'Privacy Policy' link. At the bottom, there is a copyright notice '© 2021 Sandata Technologies, LLC' and a small 'Usage Agreement' text.

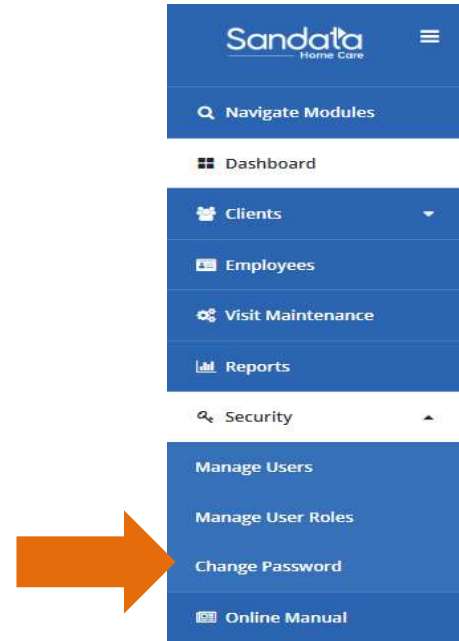
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If you forgot your password for the Sandata EVV Portal, click “Forgot Password?” to reset it. This is better than risking the account being locked after 5 unsuccessful attempts.

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.

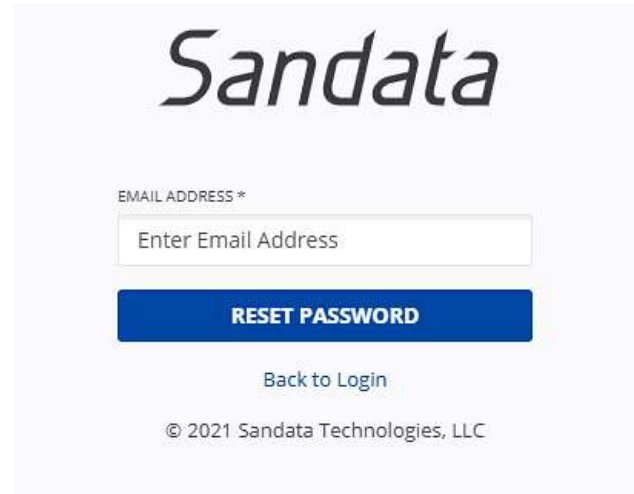


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A password can also be reset **anytime** once you've logged in to the portal. Any portal user can go to the Security module and select Change Password to do this.

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.

A screenshot of 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.

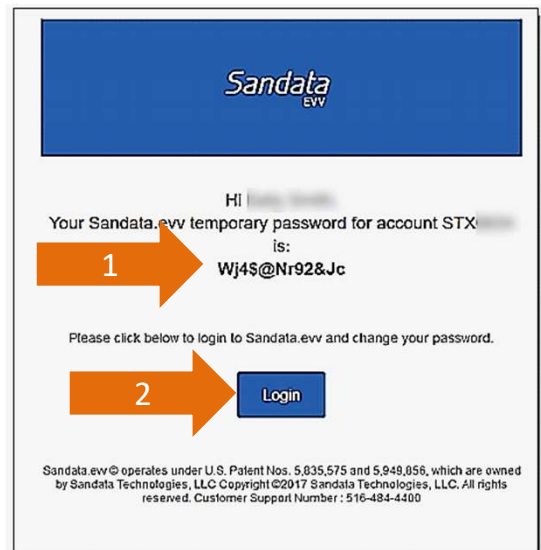
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Whichever way you need to reset your password, this next step is the same: A screen will pop up needing your email address.

- 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.

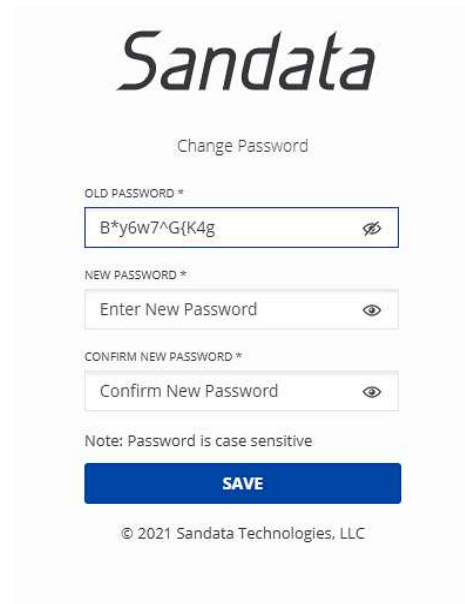


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Here's what the email will look like. Be sure to copy the temporary password, then click Login.

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 'Change Password' interface. At the top is the Sandata logo. Below it is the heading 'Change Password'. There are three password 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 the right for toggling 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'.

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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.

Resources

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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

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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:

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Thank You

Thank you for the important services you provide to members.



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Thank you.