# Electronic Visit Verification: Employee Data Entry

WISCONSIN DEPARTMENT
*of* HEALTH SERVICES

Welcome to Electronic Visit Verification: Employee Data Entry

# Objectives

- Obtain Worker ID in ForwardHealth Portal
- Search for Employee in Sandata Electronic Visit Verification (EVV) portal
- Reset Sandata Mobile Connect (SMC) App User's Password

In this training we will cover how to obtain a Worker ID from the ForwardHealth Portal. We'll switch to the Sandata EVV portal and how to search for employee information there. And, we'll also go over resetting an SMC user's password from the Sandata EVV portal.

Keep in mind that these are administrative functions. Employees who work with clients do not have these responsibilities. The exception is independent nurses, who are both administrator and employee since they are an agency of one. For this module, view the information through your administrative work.

# Key Terminology

- Client—A member/participant who receives services through Wisconsin Medicaid
- Employee—A person (worker) who provides care to one or more clients
- System User—A person with a unique login and access to the Sandata EVV portal

Our main focus for this presentation will be the Sandata system. However, we will also review some ForwardHealth information. Each location uses slightly different labels. To match the system, we will refer to workers when we are referring to information for the ForwardHealth Portal, and we will refer to employees when we are talking about the Sandata EVV portal.

# ForwardHealth Portal: Obtaining a Worker ID

In this section, we will review Obtaining a Worker ID from the ForwardHealth Portal.

# Obtaining a Worker ID

- Each worker providing care to one or more clients needs a unique worker ID. This includes exempt live-in workers.
- On the ForwardHealth Portal, providers can:
  - Obtain unique worker IDs.
  - Associate and disassociate workers to the provider.
  - Edit some types of worker information.
- EVV Customer Care can assist with worker edits.

A worker ID is needed to identify who is providing the EVV service as required by the 21st Century Cures Act. This includes all live-in workers, whether or not they will be using EVV.

As a reminder, in the context of EVV, independent nurses are considered the EVV worker and administrator and must obtain a worker ID as well.

Providers will use the secure ForwardHealth Portal to obtain the worker ID number, and then link their workers to their provider agency. This is called "associating" your workers to your agency. This link will then be sent to Sandata and display in your agency's employee list in the Sandata EVV portal.

It is recommended that providers add steps to their hiring and terminating process to add/associate and remove/disassociate workers from their agency in the ForwardHealth Portal. Providers are responsible for keeping their worker list up to date.

# Obtaining a Worker ID

The provider or fiscal employer agency will search for their worker. If not found, add the following worker information in the secure ForwardHealth Portal:

- Legal first and last name
- Date of birth
- Social Security number (SSN)
- Email address only used by that worker
- Worker start date (optional)
- Gender (optional)

**Tip:** The employee email address must be unique to that worker and cannot be used by another employee.

The provider or fiscal employer agency will first search for their worker. If they are not found, add the following worker information in the secure ForwardHealth Portal:

Legal first and last name

Date of birth

Social Security number (SSN): To protect sensitive information, the worker's SSN is collected in the ForwardHealth Portal only. This information is not sent in any files to Sandata.

Email address only used by that worker

Tip: The worker email address must be unique to that worker and cannot be used by another worker.

Worker start date (optional)

Gender (optional)

# Obtaining a Worker ID

- The ForwardHealth Portal creates the worker ID.
- Worker information from the ForwardHealth Portal is sent to the Sandata EVV portal nightly.
  - Information about live-in workers who are marked as "exempt" in the ForwardHealth Portal is not sent to Sandata.
  - The worker SSN is not sent to Sandata.

The ForwardHealth Portal creates the worker ID.

Worker information from the ForwardHealth Portal is sent to Sandata EVV portal nightly.

Information about live-in workers who are marked as "exempt" in the ForwardHealth Portal is not sent to Sandata. "Exempt" means the worker is not required to use EVV. This is not true for all live-in workers; please consult policy. "Exempt" also means the live-in worker will never work with any other clients and will therefore never use EVV.

Again, for all workers, the worker SSN is not sent to Sandata.

# Obtaining a Worker ID

For step-by-step instructions, go to the "Employee data entry" section of www.dhs.wi.gov/evv/training-administrators.htm to use one of these:

- Electronic Visit Verification Portal Functionality User Guide, chapter 7
- "How to create and maintain EVV worker IDs" video

For step-by-step instruction with worker IDs, follow the link here to DHS' EVV Training Administrators webpage. In the "Employee data" section:

- You can read through the steps in the Electronic Visit Verification Portal Functionality User Guide, Chapter 7.
- Or, you can watch the training video, "How to create and maintain EVV worker IDs."

# Employee SMC Access

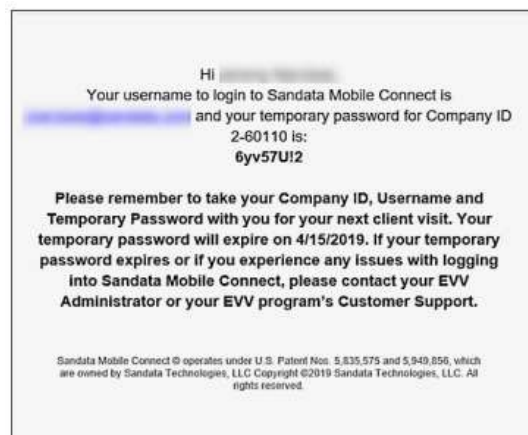| Providers and independent nurses enter employee data in the secure ForwardHealth Portal. | ForwardHealth assigns the employee ID number. | Sandata receives employee information and adds to provider's Sandata EVV portal. | Employee receives email from Sandata with temporary password. | Provider updates employee information in the secure ForwardHealth Portal. |
|---|---|---|---|---|
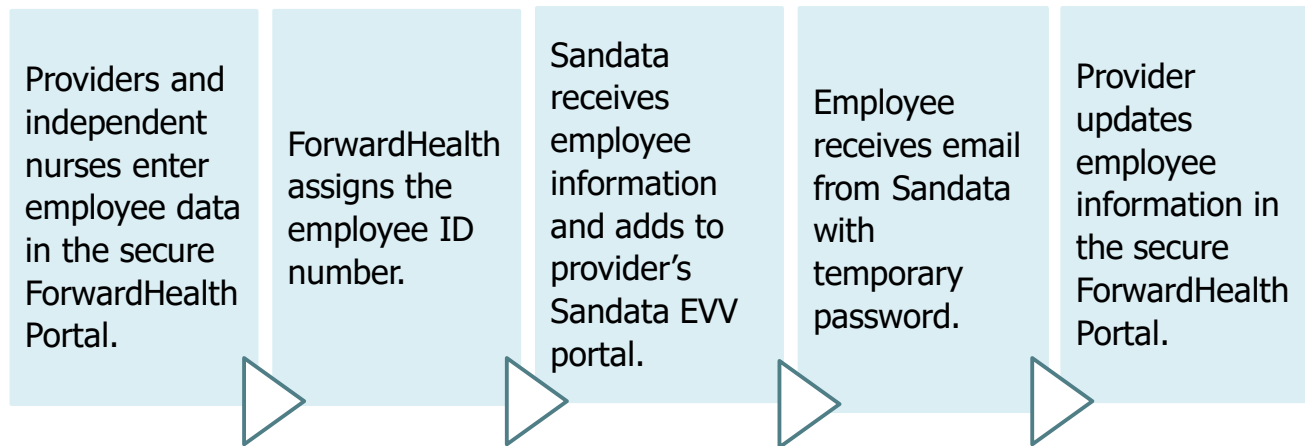
How does an employee's information lead to access to EVV?

- Providers and independent nurses enter employee data in the secure ForwardHealth Portal

- ForwardHealth assigns the employee ID number.

- Each night, Sandata receives employee information and adds the employee to the provider's Sandata EVV portal.

- Sandata Mobile Connect (SMC app) user credentials, including a temporary password, are sent to the employee in an email.

- Later, if needed, the provider updates information in the secure ForwardHealth Portal.

# Employee SMC Access

- The employee's email listed in the ForwardHealth Portal is also their SMC username.
- Employees can use the same email if working for for multiple providers.
- Sandata will email the employee a temporary password and the Company ID.

Hi
Your username to login to Sandata Mobile Connect is
and your temporary password for Company ID
2-60110 is:
6yv57U!2

Please remember to take your Company ID, Username and Temporary Password with you for your next client visit. Your temporary password will expire on 4/15/2019. If your temporary password expires or if you experience any issues with logging into Sandata Mobile Connect, please contact your EVV Administrator or your EVV program's Customer Support.

Sandata Mobile Connect © operates under U.S. Patent Nos. 5,835,575 and 5,949,856, which are owned by Sandata Technologies, LLC Copyright ©2019 Sandata Technologies, LLC. All rights reserved.

Here's an example of the email the employee receives from Sandata.
- The username will be the same as their email address. The employee email address cannot be shared by other employees, since it is used to log in to the SMC app and identifies "who provided services," one of the federally required pieces of data.
- The temporary password is provided. This expires after 60 days.
- Since an employee can be associated to different providers, the unique Company ID is included.

Check with your employees to be sure they receive this email within two days of being entered into the ForwardHealth Portal. It may be in their spam folder. Independent nurses, check you'll receive this email after you've associated yourself to your business in the ForwardHealth Portal.

# Sandata EVV Portal: Access the Employees Module

Now we will see how the employee information displays in the Sandata EVV portal.

# Access the Employees Module

- Log in to the Sandata EVV portal.
- From the navigation panel, click Employees.
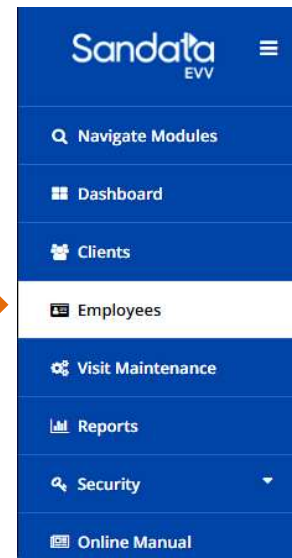
To access the Employees Module, login to the Sandata EVV portal, then click on the Employee tab.

# Searching for an Employee

Scroll through the list of employees, or:

- Click **Filters**.
- Enter desired information.
- Click **Apply Filters**.

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | ▼ FILTERS | 🖹 EXPORT DATA |

| NAME ▲ | STATUS ⇕ | EMPLOYEE ID ⇕ | POSITION ⇕ | HIRED DATE ⇕ | RELEASED DATE ⇕ | UPDATE AS OF ⇕ |
|---|---|---|---|---|---|---|
| Test, John | ● Active | 850215 | CGV - Caregiver | 09/20/2023 | | 09/20/2023 |
| Trainerone, One | ● Active | 910310500 | CGV - Caregiver | 01/01/2022 | | 01/01/2022 |
| Trainerthree, Three | ● Active | 910310502 | CGV - Caregiver | 01/01/2022 | | 01/01/2022 |
| Trainertwo, Two | ● Active | 910310501 | CGV - Caregiver | 01/01/2022 | | 01/01/2022 |

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The employee screen is displayed when you open the module. It will show all employees that came to Sandata from the ForwardHealth Portal.

If you don't have many employees, you can scroll through the list. If the list is long:
•Click Filters
•Enter desired information in any of the fields. Providers can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).
•Click Apply Filters.

# Searching for an Employee

View an employee file by clicking on their row, to the right of the employee's name.

| NAME | STATUS | EMPLOYEE ID |
|------|--------|-------------|
| Test, John | ● Active | 850215 |

You can view an employee's full information by clicking on their row, to the right of the employee's name. If you need to find their Santrax Employee ID, you can see it here on the main employee screen.

On the next slide we'll see the employee's Personal tab.

# Searching for an Employee

- Employee **Personal** tab will be displayed.
- Grayed out fields cannot be changed.
- Employee email, start date, and end dates are changed in the ForwardHealth Portal.
- All other employee edits are made by EVV Customer Care.

Here in the employee's Personal tab you will notice information that was transferred from ForwardHealth Portal to Sandata. If you click on the pencil icon in each section, you'll notice all information is grayed out. No information can be changed in the Sandata EVV portal.

Remember: Most employee information is updated in the ForwardHealth Portal: employee email address, start date, and end dates. For edits to a name, Social Security number, or date or birth, please contact EVV Customer Care.

# Reset SMC App User's Password

A Sandata EVV portal administrative user can reset an employee's SMC app password. Although employees can reset their own password within the SMC app, there may be times they ask an administrative user to help, especially if they are new to using the app.
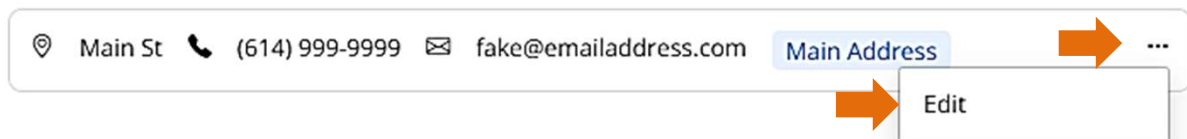
Let's take a look.

# Reset Mobile Password

- Open the employee file in Sandata (see slides 11-15).
- Click on the dots (…) in the **Addresses/Phone Numbers** section for more options.
- Click **Edit**.

**Addresses | Phone Numbers**                               ADD

⊙  Main St  📞  (614) 999-9999  ✉  fake@emailaddress.com   Main Address                        ···

Edit

Open the employee file in Sandata (see slides 11-15).
At the bottom of the employee screen, click on the three dots (…) in the Address/Phone Numbers section. If you don't see the three dots right away, scroll to the right on your screen to find them.
Then click Edit.

# Reset Mobile Password

- Click **Reset Mobile User Password**.
- Direct the employee to open the Sandata email for the temporary password, log in, and reset to a password they choose.

A pop-up window will display. In the bottom right corner. Click Reset Mobile User Password.
An email will automatically be sent to the employee from Sandata with a temporary password. Direct the employee to open the Sandata email for their temporary password.

The employees will use the temporary password to log in and then reset to a password they choose.

Employees can always reset their own password within the app. These slides just shows that you can help them, too.

# Resources

# Resources

- EVV Customer Care Monday–Friday, 7 a.m.–6 p.m. CT
  - Phone: 833-931-2035
  - Email: VDXC.ContactEVV@wisconsin.gov
- 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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