

Electronic Visit Verification Stakeholder Workgroup

January 26, 2026



Today's Agenda

- 1** | Welcome and Housekeeping
- 2** | Ohio Department of Aging (AGE): 'Recipient Does Not Match' Error Codes
- 3** | AGE: How to Verify a Recipient's Medicaid ID
- 4** | AGE: How to Register Recipients in Sandata
- 5** | AGE: Changes to Remittance Advice
- 6** | Announcements and Resources

Access, Inclusion, and Reasonable Accommodation

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Unless ODM's Civil Rights/ADA Coordinator approves in advance, individuals may not record the meeting using the recording function in Teams, GoToMeeting, Zoom, or any virtual meeting platform used by the department, nor may individuals utilize artificial intelligence (AI) technologies to transcribe meetings.

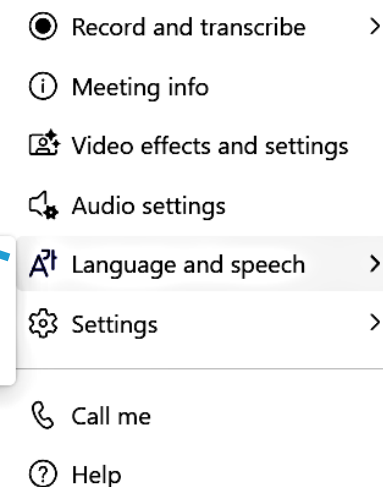
Accessibility (1 of 3)

You can turn on closed captioning for this webinar by following the steps below in Microsoft Teams.

Step 1. Click on the **More** button at the top of the screen.



Step 2. Hover your mouse over the **Language and speech** button in the dropdown.

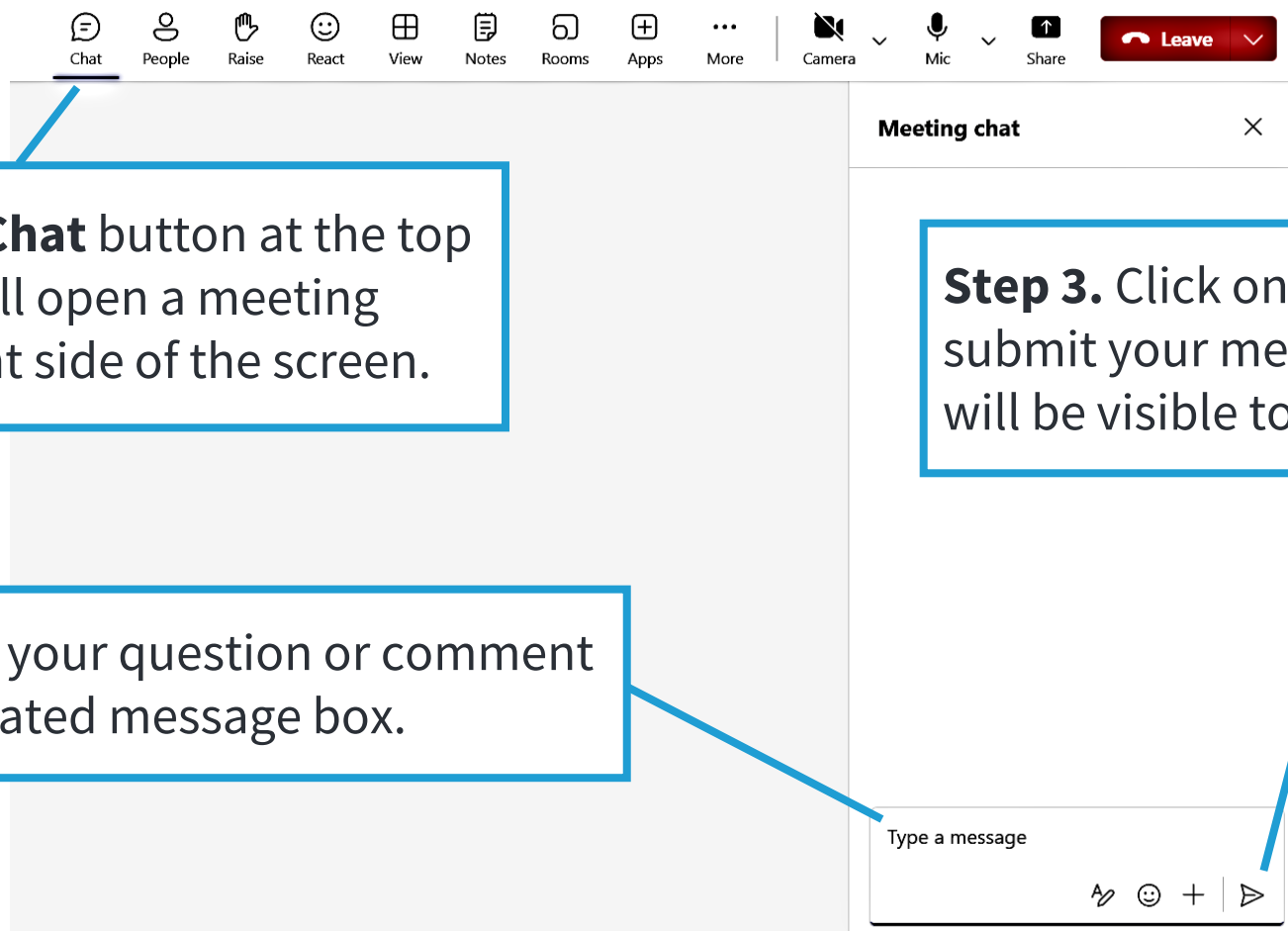


Turn on live captions
Turn on Speaker Coach

Step 3. Click on the **Turn on live captions** button.

Accessibility (2 of 3)

If you would like to submit a question or comment through the chat, please feel free to do so by following the steps below.



Step 1. Click on the **Chat** button at the top of the screen. This will open a meeting chat pane on the right side of the screen.

Step 2. Type your question or comment in the designated message box.

Step 3. Click on the send icon to submit your message. Your message will be visible to all attendees.

Accessibility (3 of 3)

If you would like to verbally comment or ask a question, please raise your hand by following the steps below.



Step 1. Click on the **Raise** button at the top of the screen. This will notify the presenter that you have a comment or question.

Step 2. Please wait for the presenter to acknowledge your raised hand before you begin speaking.

Step 3. If you are still muted, your mic will look like this. Please click on the mic icon to unmute.



We're Here to Help: Ways to Engage and Get Assistance

We encourage all participants to share their questions and feedback—either in the chat or by raising your hand to speak.

If you have a more detailed or situation-specific question, please take advantage of the following support options:



Sandata Office Hours

Connect one-on-one with a Sandata trainer during daily office hours.









[Register here](#) for an upcoming session.



24/7 Sandata Provider Support

Reach out by phone at 1-855-805-3505 or email us at ODMCustomerCareEmail@sandata.com for personalized assistance.

Electronic Visit Verification Claims Processing Phases

		EVV Claims Adjudication Phases				
PHASE 1	PHASE 2	PHASE 3	PHASE 4	PHASE 5	PHASE 6	PHASE 7
March 1, 2025	June 1, 2025	June 1, 2025	August 1, 2025	October 1, 2025	January 1, 2026	March 1, 2026
Billed to ODM FFS		Billed to Next Gen MCEs		Billed to DODD	Billed to ODM or AGE	Billed to MyCare
HOME HEALTH SERVICES	PRIVATE DUTY NURSING, NURSE ASSESSMENT AND CONSULT	HOME HEALTH SERVICES	PRIVATE DUTY NURSING NURSE ASSESSMENT AND CONSULT	IO, Level 1, SELF WAIVER PROGRAM SERVICES	OHIO HOME CARE, PASSPORT WAIVER SERVICES	HOME HEALTH PDN, NURSE ASSESSMENT AND CONSULT, WAIVER SERVICES
						

**Based on claim line date of service.*

PASSPORT ‘Recipient Does Not Match’ Error Codes



EV003

Consumer not found in Sandata

Cause

The Medicaid ID for the Recipient on your claim does not match the information in the Sandata EVW system.

Resolution

- Verify the Recipient Medicaid ID and if incorrect, deactivate the Recipient's record. Then, create a new Recipient record with the correct or updated Medicaid ID.
 - For detailed steps, refer to the Sandata resource [Creating a New Recipient](#).

How to Verify a Recipient's Medicaid ID

Locating a Recipient's Medicaid ID

Once Medicaid coverage has been established for the Recipient, the provider can identify their Medicaid ID through:

- 1 The PASSPORT Administrative Agency (PAA) Case Manager**

The PAA will update providers when Medicaid coverage has been established and may share the Recipient's Medicaid ID in the following ways:

 - a. Verbally
 - b. Demographic page for the person-centered services plan (PCSP) and/or
 - c. AGE 3697 report

- 2 Provider Network Management (PNM)**

Medicaid providers can verify Medicaid eligibility, including the Recipient's Medicaid ID by logging into the PNM system.

Follow the steps on the next slides to verify a Recipient's Medicaid ID in PNM.

Locating a Recipient's Medicaid ID in Provider Network Management: Step 1

When you enter PNM, click on **'Recipient Eligibility'** in the dropdown in the left-hand corner.



The screenshot shows the Ohio Department of Medicaid Provider Network Management (PNM) system interface. On the left is a dark grey sidebar menu with the following items: Medicaid Home, Home, My Queue, Provider Search, Owner Search, Provider Directory, Provider Search - GIS, Site Visit Assignment, Transaction Search, Alternative Payment Model Information, Recipient Eligibility (highlighted in yellow), Provider Specialty Search, Provider Ed & Training Resources, Contact Us, Fee Schedule, and Log Out. The top navigation bar includes a 'Menu' icon, the 'Ohio Department of Medicaid' logo, and links for 'Provider Network Management', 'Medicaid Home', 'Learning', 'Contact', and 'Fee Schedule'. The user 'Carly Coe' is logged in, with a 'Log out' button. The main content area displays the 'Ohio Department of Medicaid' logo and a welcome message: 'Welcome to Provider Network Management (PNM) System. Please use the Menu to navigate.'

Locating a Recipient's Medicaid ID in Provider Network Management: Step 2

To verify the Recipient's Medicaid ID, enter their Social Security Number, date of birth, and the specific dates of services into the 'Eligibility Search'. Then, click 'Search'.

The screenshot displays the Ohio Department of Medicaid Provider Network Management interface. At the top, there is a navigation bar with the Ohio logo, 'Department of Medicaid', and various menu items including 'Provider Network Management', 'Medicaid Home', 'Learning', 'Contact', and 'Fee Schedule'. A user profile for 'Carly Coe' and a 'Log out' button are also visible. Below the navigation bar is a 'Jump To:' dropdown menu currently set to 'Search-RA'. A row of icons represents different system functions: Search-RA, Submit PA, Search Eligibility, Search PA, Submit Claim, Search Claim, Hospice Enrollment, Retrieve Reports, Provider Financial, Correspondence, and ORP Search. The main content area features a search form titled 'ELIGIBILITY SEARCH'. The form includes fields for 'Provider Medicaid ID:', 'Provider NPI:', and 'Provider Name:'. Below these is a section with a red asterisk warning: 'An asterisk * indicates a required field'. The form contains several input fields: '* Medicaid Billing Number', '* Date of Birth Example(12/31/2025) Full Date Needed' (with a calendar icon), '* From DOS Example(12/31/2025) Full Date Needed' (with a calendar icon), '* or SSN Example(123456789) No Dashes Needed', 'Procedure Code', and '* To DOS Example(12/31/2025) Full Date Needed' (with a calendar icon). At the bottom of the form are 'Search' and 'Clear' buttons.

Locating a Recipient's Medicaid ID in Provider Network Management: Step 3

Once you fill in the required information and click 'Search', the eligibility information will be populated.

The Recipient Medicaid ID is the **Medicaid Billing Number**.

RECIPIENT INFORMATION

Medicaid Billing Number:	Date of Birth:	County of Residence:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name:	Date Of Death:	County of Eligibility:
<input type="text"/>	<input type="text"/>	<input type="text"/>
First Name, MI:	SSN:	County Office Information:
<input type="text"/>	<input type="text"/>	https://jfs.ohio.gov/about/local-agencies-directory
Gender:		
<input type="text"/>		

BENEFIT/ASSIGNMENT PLAN(S)

Benefit/Assignment Plan ↑	Effective Date ↑	End Date ↑
Alcohol and Drug Addiction Services	01/01/2026	01/31/2026
Medicaid	01/01/2026	01/31/2026
MRDD Targeted Case Mgmt	01/01/2026	01/31/2026
Ohio Home Care Redesign Waiver	01/01/2026	01/31/2026
Ohio Mental Health	01/01/2026	01/31/2026

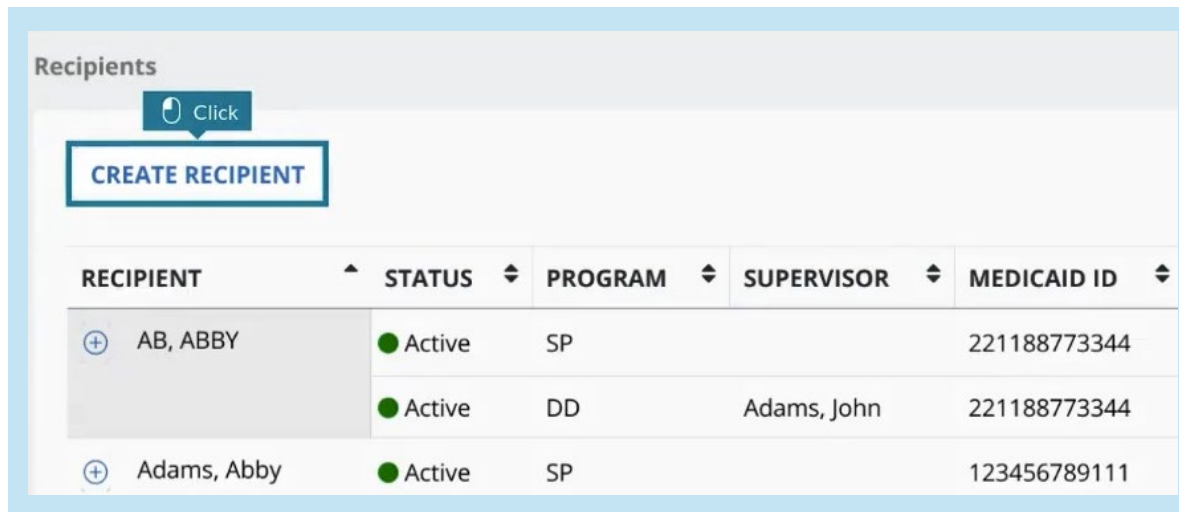
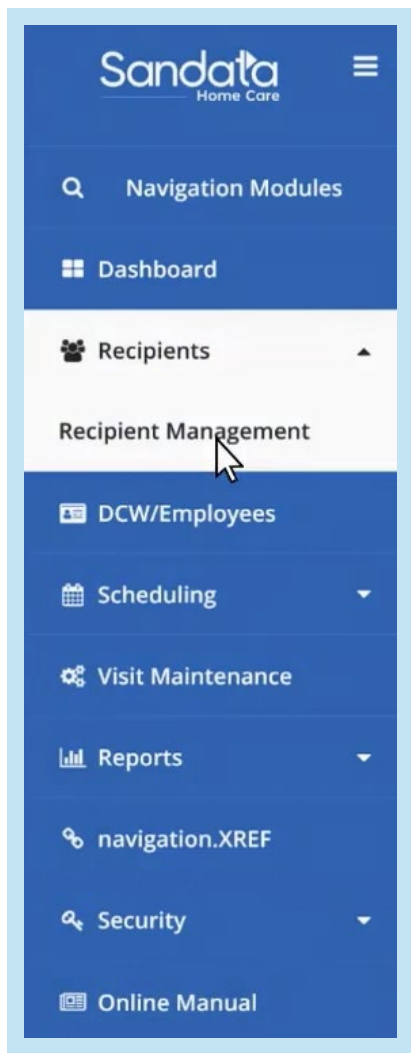
How to Register Recipients in Sandata

Every visit must include a Recipient to meet EVV requirements. If a Recipient is not added, your claim will be denied.

Follow the steps on the next slides to successfully register Recipients in the Sandata EVV web portal.

Registering Recipients: Step 1

Navigate to the Recipients module and click **Recipient Management**. Then click **Create Recipient**.



Registering Recipients: Step 2

A pop-up window will appear. Fill out the required fields, including date of birth, program, payer, and Medicaid ID.

After entering the Recipient's Medicaid ID, click **Search**. If a matching Recipient is found, the last name and first name fields will be filled in.

Click **Create Recipient** to receive a successful confirmation message.

The screenshot shows a 'New Recipient' registration form with the following fields and controls:

- *Required** (indicated in red text)
- ODA Only / No Medicaid ID**: Toggle switch (currently off)
- Newborn**: Toggle switch (currently off)
- Last Name**: Text input field with placeholder 'Enter Last Name'
- First Name**: Text input field with placeholder 'Enter First Name'
- Date Of Birth***: Date picker with placeholder 'Enter Date' and a calendar icon
- Program***: Dropdown menu with placeholder 'Select Program'
- Medicaid ID***: Text input field with placeholder 'Enter Medicaid ID' and a blue **SEARCH** button
- Client Payer ID**: Text input field with placeholder 'Enter Client Payer ID'
- SSN**: Text input field with placeholder '___-__-__'
- Phone**: Text input field with placeholder '() ___-__'

At the bottom of the form, there are two buttons: **CANCEL** and **CREATE RECIPIENT**.

Registering Recipients: Step 3

Upon creation, the Recipient record loads in a pending status. Review and edit the information on the Recipient's profile.

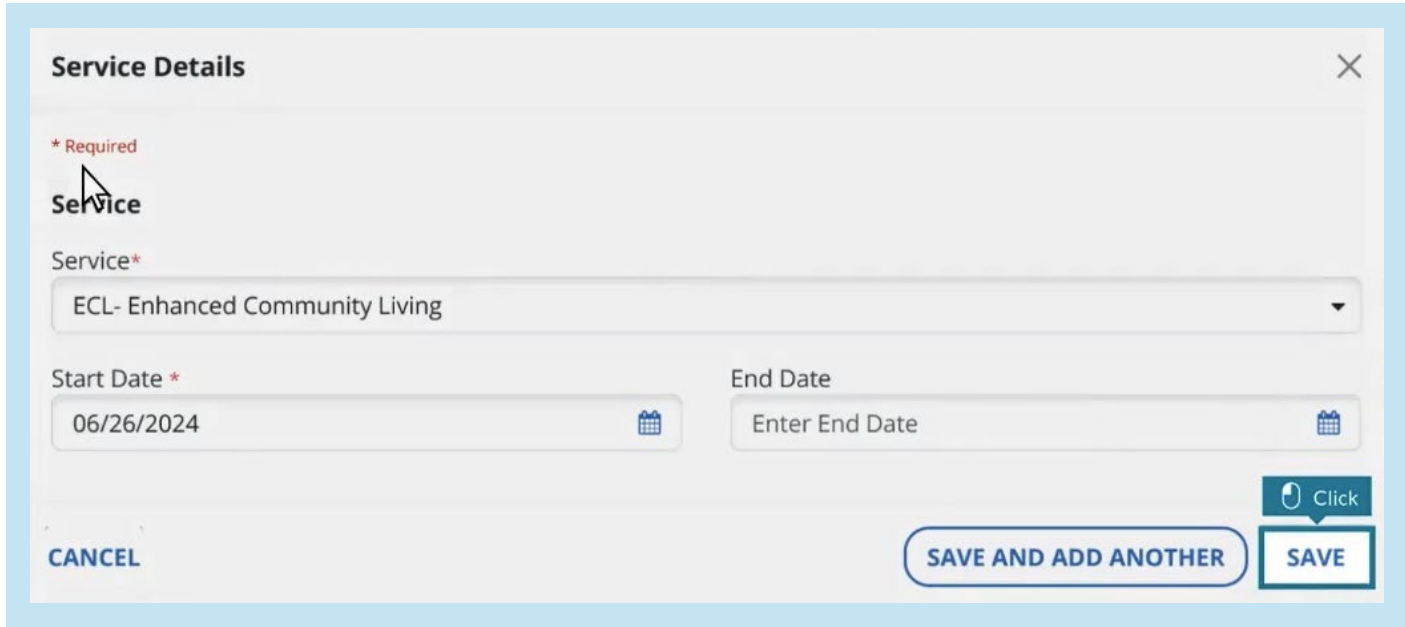
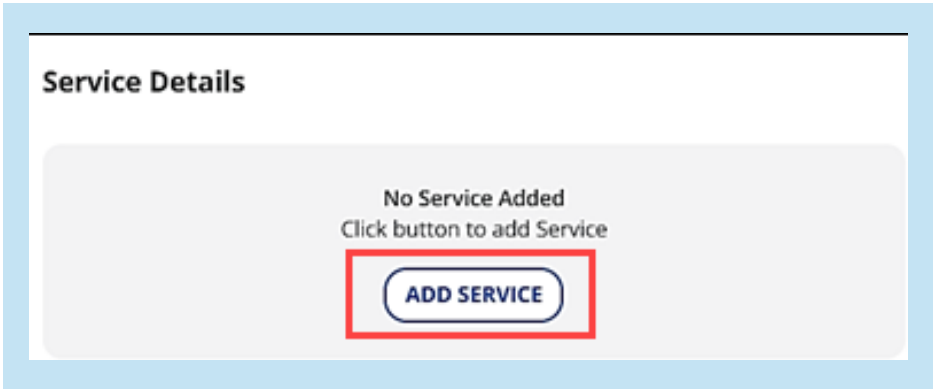
The **Personal** tab includes information about the Recipient's identity. Their phone number and address are pulled in from the Recipient records.

Click the **Program** tab to add the Recipient's services and authorizations.

The screenshot shows a web interface for a recipient's profile. At the top, there is a navigation bar with a 'BACK' button, a dropdown menu showing 'MyC | Pending', and buttons for 'HISTORY' and 'NOTES'. Below the navigation bar, the recipient's details are listed: 'Recipient ID: 553871 | Medicaid ID: 999999994321 | Main Address: -- | Phone No: -- | Main Emergency Contact: --'. The main content area has three tabs: 'Personal' (selected), 'Program*', and 'Schedules'. The 'Personal' tab is divided into three sections: 'Identifiers', 'Personal Information', and 'Addresses | Phone Numbers'. The 'Identifiers' section shows 'Recipient ID 553871', 'Medicaid ID 999999994321', 'SSN -', and 'Agency ID 999999994321'. The 'Personal Information' section shows 'Recipient Name Mary Rollins', 'NewbornNo', 'Date of Birth February 17, 1958', 'Gender -', and 'Language English'. The 'Contacts' section shows 'No contact added. Add one main contact.' and an 'ADD CONTACT' button. At the bottom of the 'Personal' tab, there is an 'ADD' button next to the 'Addresses | Phone Numbers' section.

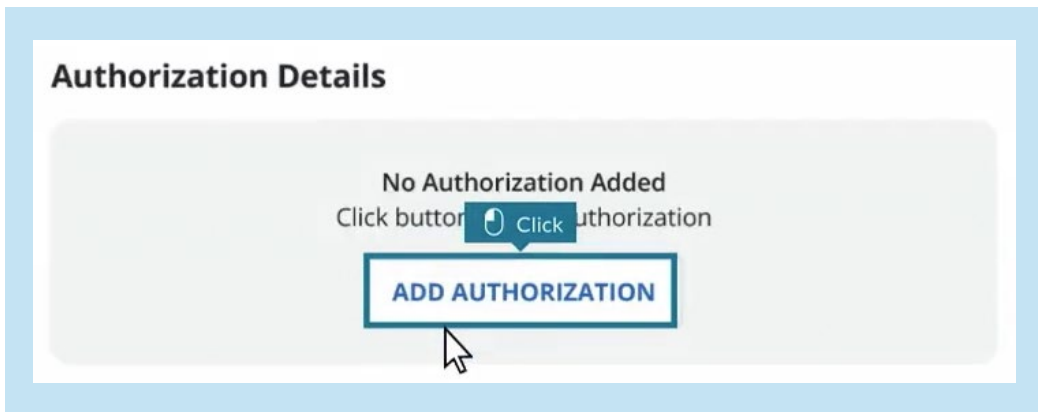
Registering Recipients: Step 4

Click **Add Service** under Service Details. Indicate the type of service and the start and end date, then click **Save**.



Registering Recipients: Step 5

If prior authorization is required for the individual's services, click **Add Authorization** and complete the required fields in the pop-up window, including format, start and end date, and authorization limitation. Click **Save**.



Registering Recipients: Step 6

Lastly, change the record status from Pending to **Active** using the dropdown. Review the information in the pop-up window to ensure it is accurate—then click **Save**. The Recipient is now ready to receive services.

The screenshot shows the 'Edit Recipient' page for a recipient named 'MyC'. The status is currently 'Pending'. A dropdown menu is open, showing options: Pending, Active (highlighted), Discharged, and Cancelled. The page includes sections for Program Details, Payer Details, and Authorization Details.

Recipients / Edit Recipient Account: 20837 [US/Eastern] - santrax LOG OUT

MyC | Pending HISTORY NOTES

Recipient ID: 553871 | Medicaid ID: 999999994321 | Main Address: -- | Phone No: -- | Main Emergency Contact: --

Personal Program Schedules

MyC - Enhanced Community Living - CareSource - Authorized

Program Details

Supervisor -

Enrollment: - EOC Date -

Created Date: 06/26/2024 Eligibility Begin Date -

Effective Date: 06/26/2024 Eligibility End Date -

SOC Date - Reason For Change -

Payer Details

Payer Name: CareSource Medicaid ID: 99

Bill Rate: Default Rank: 1

Recipient Payer ID: 999999994321 Group Number:

Start Date: - End Date: -

On Hold

Discharged

Cancelled

Voided Auth. Expired Auth. ADD AUTHORIZATION

Authorization Details

Payer: CareSource Authorization No: AMP20240626T141 905900

The screenshot shows the 'Program Details' pop-up window. It contains various fields for program information, including Program, Supervisor, Enrollment Date, Effective Date, SOC Date, EOC Date, Eligibility Begin Date, Eligibility End Date, Created Date, and Reason For Change. A 'SAVE' button is highlighted at the bottom right.

Program Details

* Required

Program* MyC

Supervisor Select Supervisor

Enrollment Date Enter Enrollment Date Effective Date* 06/26/2024

SOC Date Enter SOC Date EOC Date Enter EOC Date

Eligibility Begin Date Enter Eligibility Begin Date Eligibility End Date Enter Eligibility End Date

Created Date* 06/26/2024 Reason For Change Select Reason For Change

CANCEL SAVE

Changes to Ohio Department of Aging Remittance Advice

Changes to Ohio Department of Aging Remittance Advice

The Ohio Department of Aging (AGE) is updating their Remittance Advice format to be ready for your January claims submissions. When you receive your January Remittance Advice, you will no longer see EVV error warning messages.

If claims do not pass the EVV validations, you will see the EVV denial reasons on your remittance advice in the invoice detail comments. Details on the error codes can be found in the [AGE EVV Flow](#).

Electronic Visit Verification Announcements and Resources

Upcoming Alternate EVV Town Hall

Sandata, in cooperation with the Ohio Department of Medicaid (ODM), will host an informational Alternate Electronic Visit Verification (Alt EVV) Town Hall for provider vendors.



Alt EVV Town Hall

- **Thursday, March 19 from 11 a.m. – 12:00 p.m.**
- What will be covered?
 - Proposed changes to the EVV program
 - Planned Alt EVV technical integration changes
 - Next steps and opportunity for questions
- Register here: <https://info.hhaexchange.com/marchtownhall>

Schedule of Meetings

EVV Stakeholder Workgroup meetings are held virtually every month.



Upcoming meetings are scheduled for the following days and times:

- **Monday, February 23 from 2:30 – 4 p.m.**
- Monday, March 23 from 2:30 – 4 p.m.
- Monday, April 27 from 2:30 – 4 p.m.

What EVV topics would you like to discuss in upcoming workgroups?

Do you know someone who may be interested in joining EVV Stakeholder Workgroup meetings to listen in?

They can visit medicaid.ohio.gov/evv for meeting information.

Resources and Additional Information

Slides from today's meeting will be posted on ODM's website.

Please refer to medicaid.ohio.gov/evv for additional information about the EVV program.

Scroll down on the EVV website to see new AGE-specific resources on the right-hand side.

AGE Resources

- [EVV Provider Triage for Waiver Agencies](#)
- [State Funded PASSPORT](#)
- [PASSPORT Unit Methodology](#)
- [AGE Billing Resources](#)
- [Direct Data Entry \(DDE\) Resource](#)
- [EVV Claims Validation Process for Passport Waiver](#)
- [Provider Location ID and Medicaid ID Alignment](#)

Helpful Resources and Trainings

- Looking for helpful resources on the EVV website? Browse the [Resource Guide](#).
- Sign up for the monthly EVV newsletter using the [ODM Subscriber Form](#).
- Need help with the Sandata system? Register for [office hours](#).
- Questions? Send an email to interagencypolicy@medicaid.ohio.gov.
- Need more help? Register for upcoming [Sandata trainings sessions](#).

THANK YOU

medicaid.ohio.gov