

Electronic Visit Verification Stakeholder Workgroup

August 25, 2025



Today's Agenda

- 1** | Welcome and Housekeeping
- 2** | Components of EW Success
 - How to Register Recipients
 - How to Record Visits
- 3** | Discussion: Barriers to EW Success
- 4** | Announcements and Resources

Access, Inclusion, and Reasonable Accommodation

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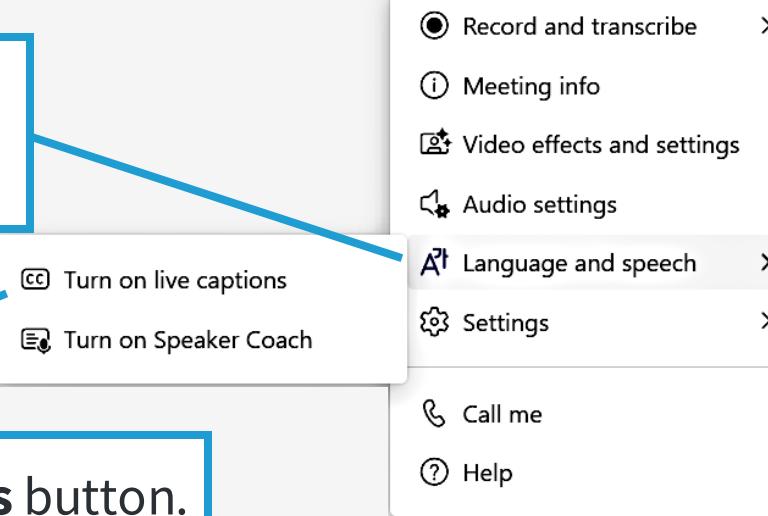
Accessibility (1 of 3)

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.



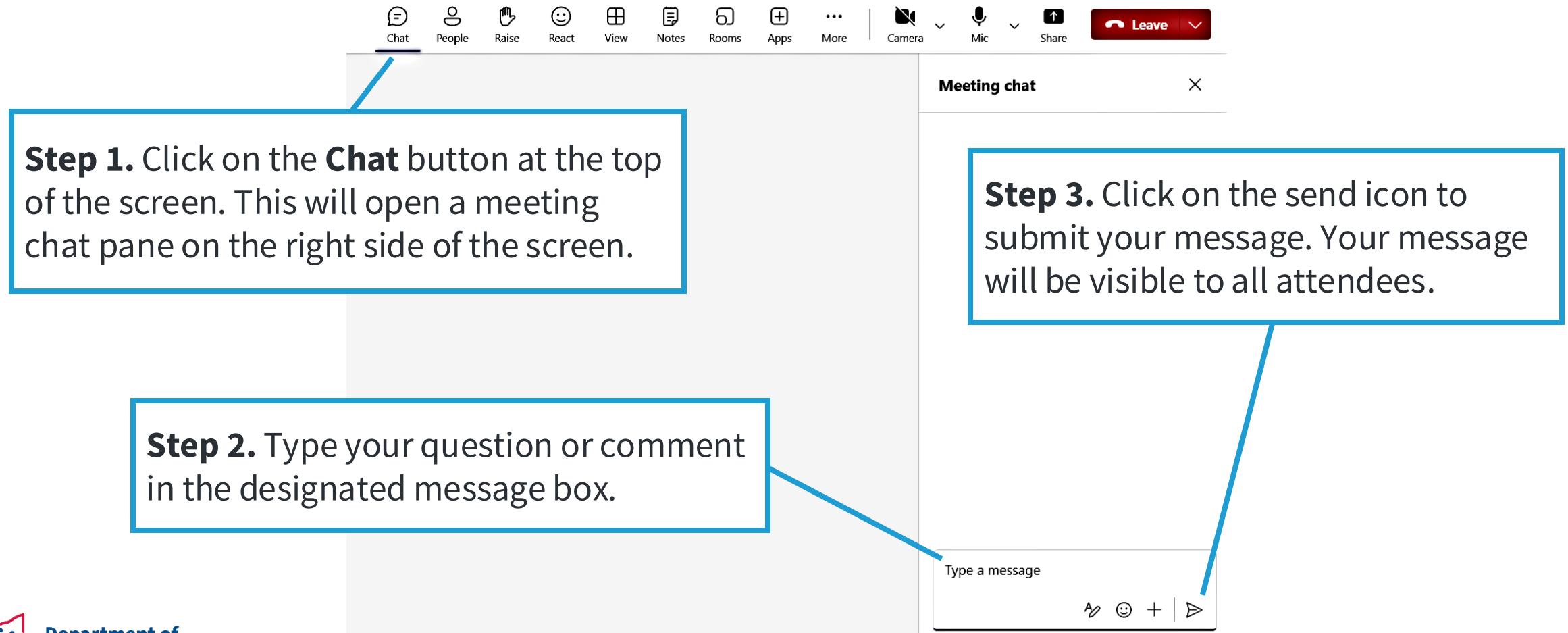
Step 2. Hover your mouse over the **Language and speech** button in the dropdown.



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

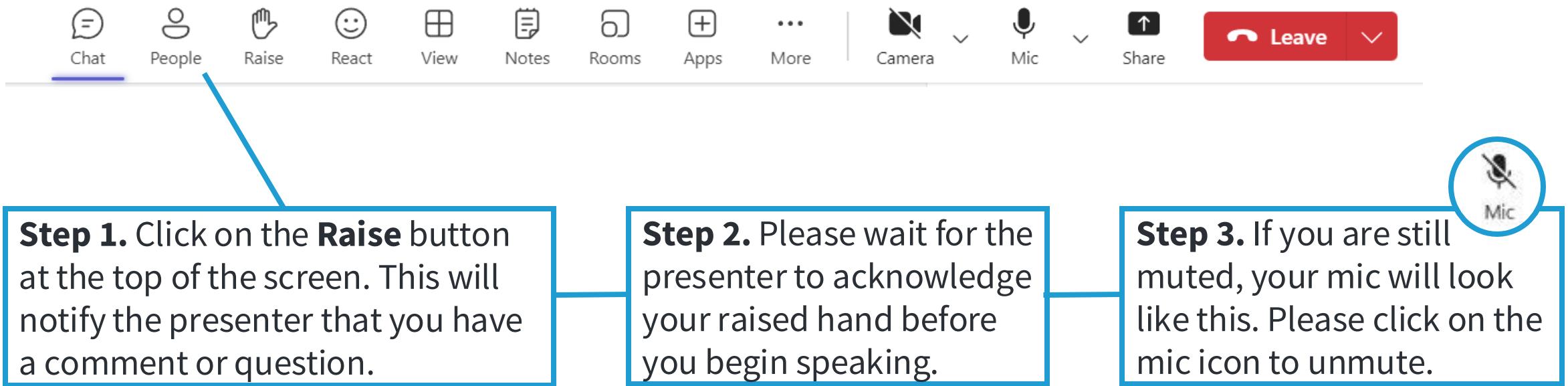
Accessibility (2 of 3)

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



Accessibility (3 of 3)

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

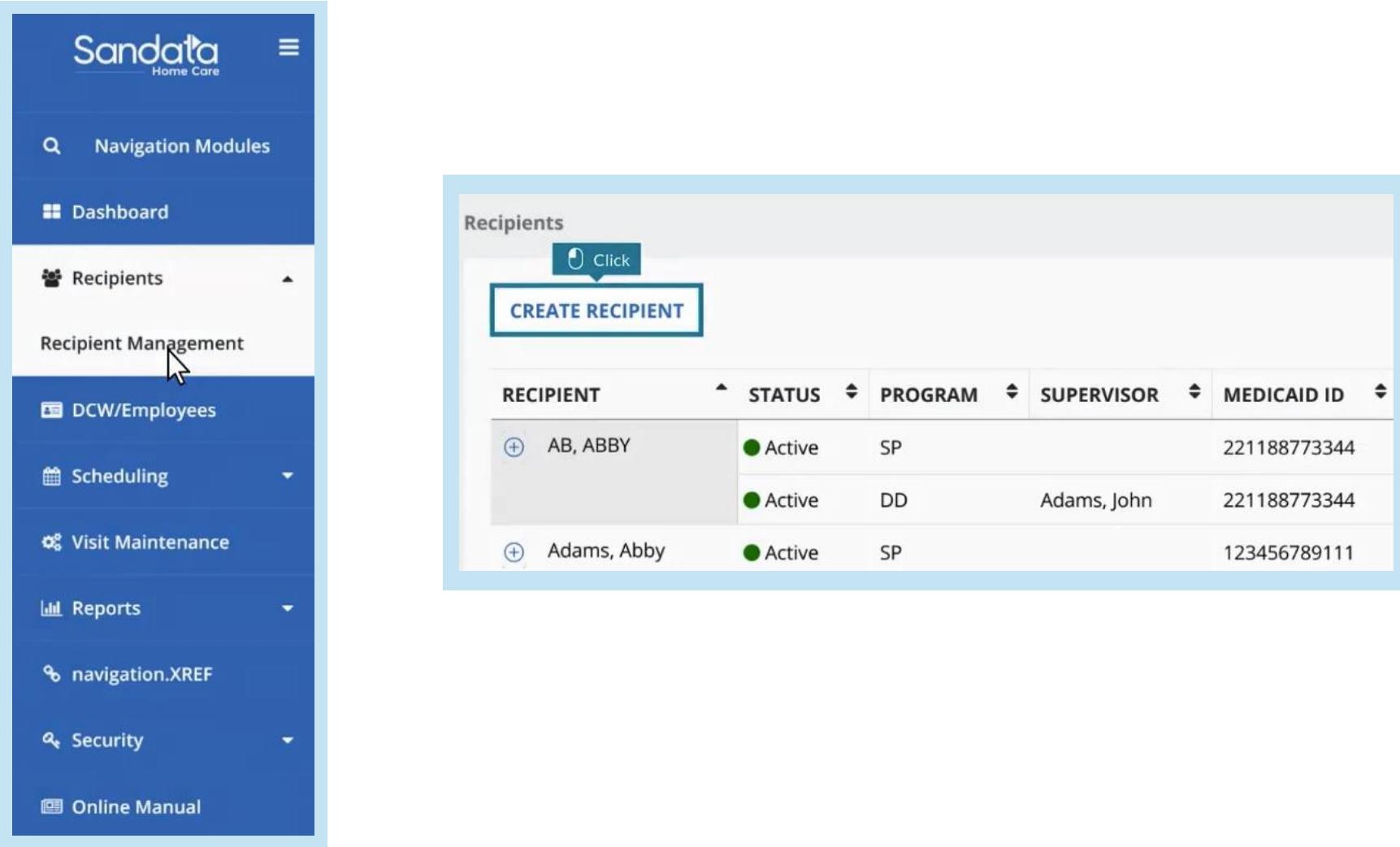


How to Successfully Register Recipients

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 EW web portal.

Registering Recipients: Step 1

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



The image consists of two side-by-side screenshots of a software application interface. The left screenshot shows the application's navigation menu. The right screenshot shows a list of recipients with a 'CREATE RECIPIENT' button.

Navigation Menu (Left):

- Sodata Home Care
- Navigation Modules
- Dashboard
- Recipients
- Recipient Management (highlighted with a cursor)
- DCW/Employees
- Scheduling
- Visit Maintenance
- Reports
- navigation.XREF
- Security
- Online Manual

Recipients List (Right):

CREATE RECIPIENT

RECIPIENT	STATUS	PROGRAM	SUPERVISOR	MEDICAID ID
AB, ABBY	Active	SP		221188773344
	Active	DD	Adams, John	221188773344
Adams, Abby	Active	SP		123456789111

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.

New Recipient

*Required

ODA Only / No Medicaid ID

Newborn

Last Name

First Name

Date Of Birth* 

Program*

Medicaid ID*

Client Payer ID

SSN

Phone

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.

MyC | Pending

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

Personal Program* Schedules

Identifiers

Recipient ID	553871	Medicaid ID	999999994321
SSN	-	Agency ID	999999994321

Personal Information

Recipient Name	Mary Rollins	NewbornNo	
Date of Birth	February 17, 1958	Gender	-
Language	English		

Addresses | Phone Numbers

Contacts

No contact added.
Add one main contact.

ADD CONTACT

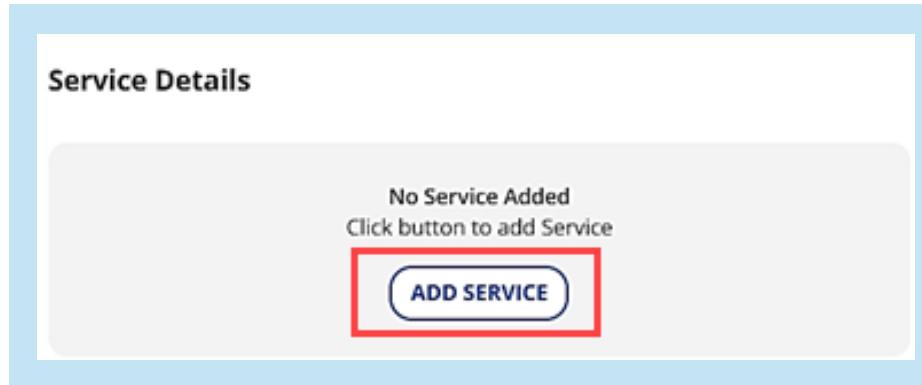
Registering Recipients: Step 4

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

Service Details

No Service Added
Click button to add Service

ADD SERVICE



Service Details

* Required

Service

ECL- Enhanced Community Living

Start Date *

06/26/2024

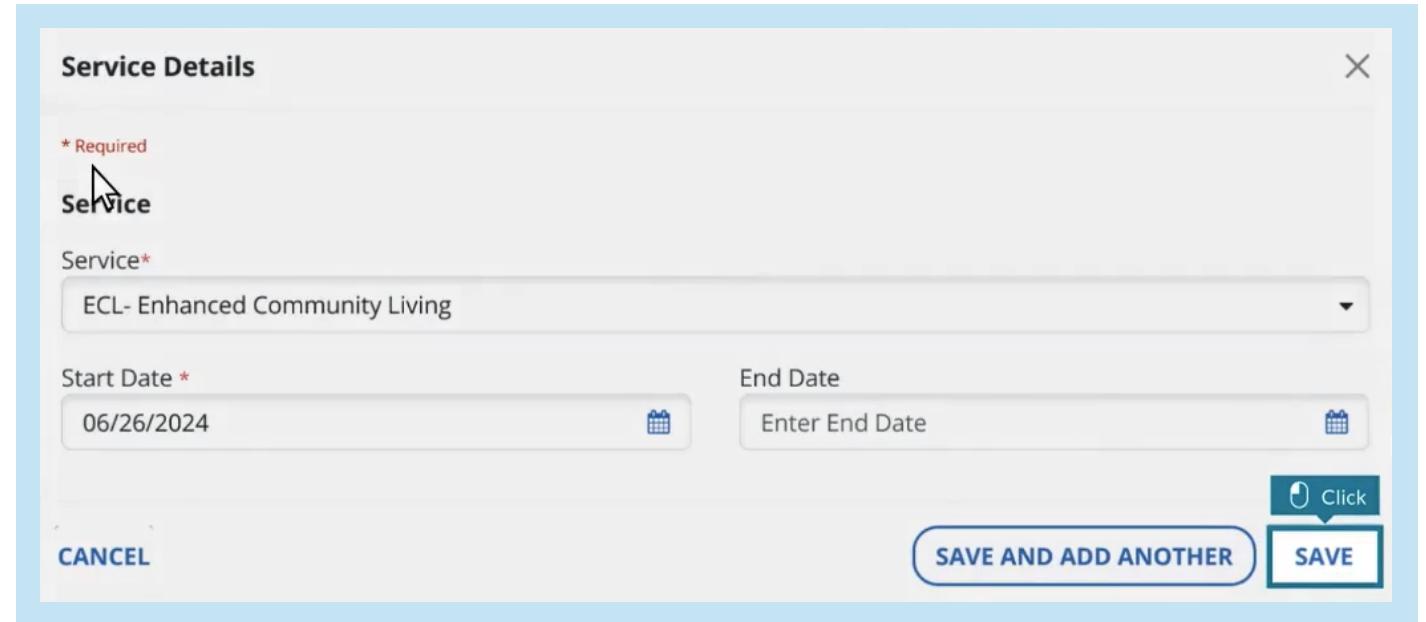
End Date

Enter End Date

CANCEL

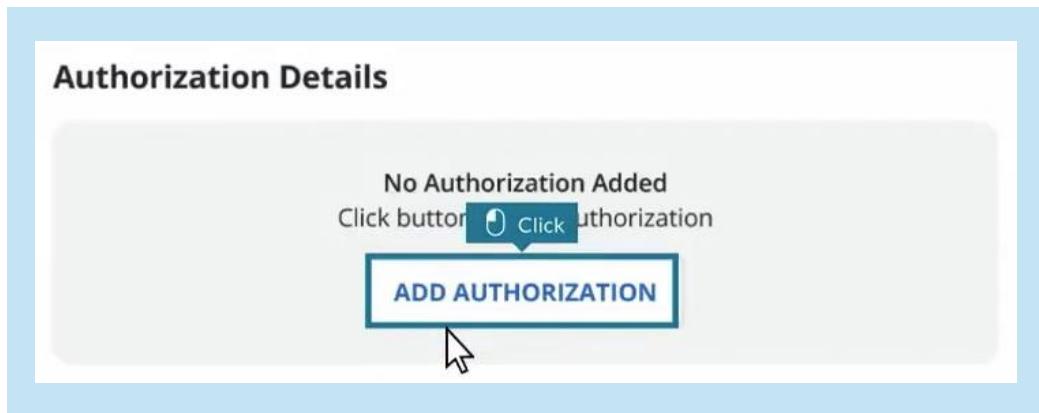
SAVE AND ADD ANOTHER

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**.



Note: Check the authorization to ensure the payer, service, and event code are correct.

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.

Recipients / Edit Recipient

Account: 20837 [US/Eastern] - santrax [LOG OUT](#)

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

[BACK](#) [MyC | Pending](#)

[HISTORY](#) [NOTES](#)

Personal [Program](#) [Schedules](#)

MyC - Enhanced Community Living - CareSource - Authorized

Program Details

Supervisor	-
Enrollment:	-
Created Date:	06/26/2024
Effective Date:	06/26/2024
SOC Date	-

Payer Details

Payer Name:	CareSource
Bill Rate:	Default
Recipient Payer ID:	999999994321
Start Date:	-
End Date:	-

Authorization Details

Payer:	CareSource
Authorization No:	AMP20240626T141 905900

Pending

[Voided Auth.](#) [Expired Auth.](#) [ADD AUTHORIZATION](#)

Program Details

* Required

Program*

Supervisor

Enrollment Date Effective Date*

SOC Date EOC Date

Eligibility Begin Date Eligibility End Date

Created Date* Reason For Change

[CANCEL](#)

How to Record Visits Successfully

The Sandata Mobile Connect (SMC) application is ODM's preferred method of visit capture. Follow the steps on the next slides to successfully log visits in the SMC application.

How to Download the Sandata Mobile Connect Application

You can download the SMC application on your personal device by visiting the Google Play Store or Apple Store.

Google Play Store

Click the link to download:

play.google.com/store/apps/details/Sandata%20Mobile%20Connect?hl=en_IN&id=com.sandata.smc.prod&pli=1&utm_medium=email&utm_source=govdelivery



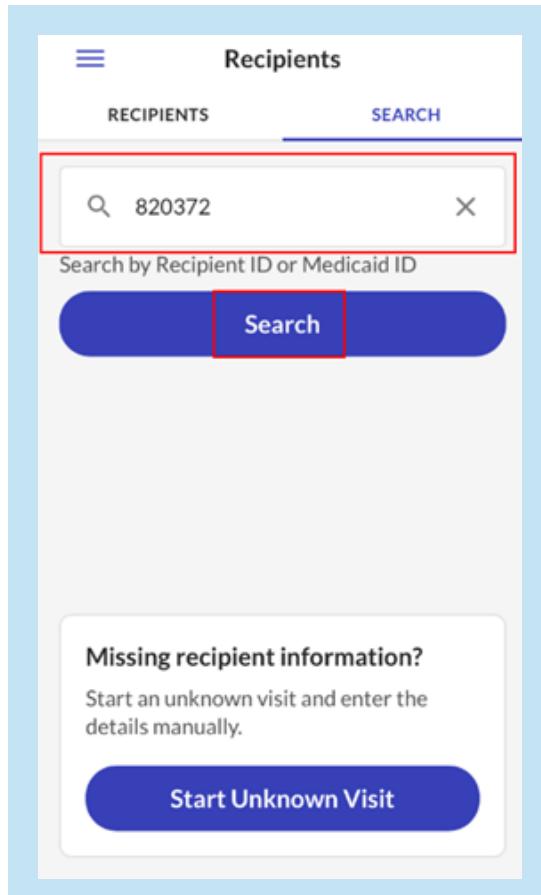
Apple Store

Click the link to download:

apps.apple.com/us/app/sandata-mobile-connect/id6451209985?utm_medium=email&utm_source=govdelivery

Starting a Visit: Step 1

After logging in to the SMC application on your phone or state-provided device, click in the **Search** field and enter the 12-digit Medicaid ID or 6-digit Recipient ID of the Recipient. Click the **Search** button.



Recipients

RECIPIENTS SEARCH

820372

Search by Recipient ID or Medicaid ID

Search

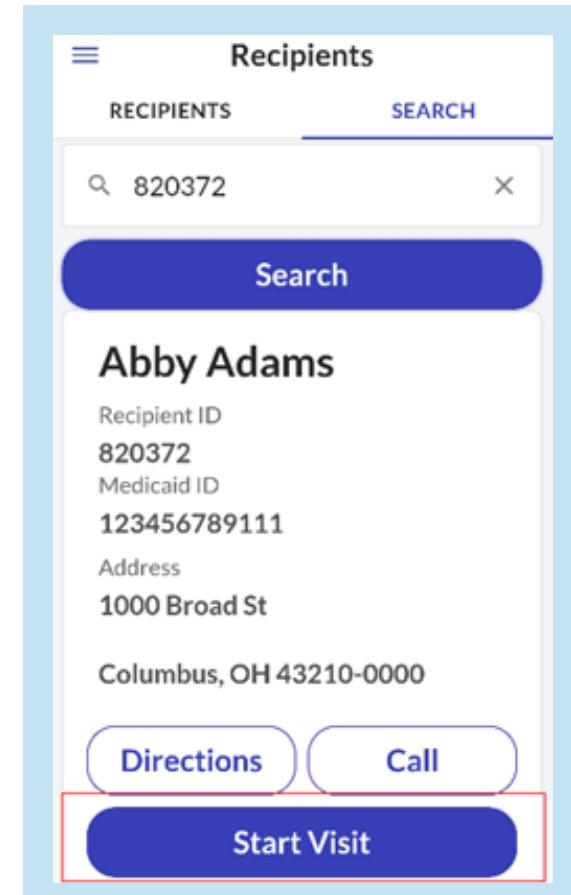
Missing recipient information?
Start an unknown visit and enter the details manually.

Start Unknown Visit

If a matching Recipient record is found, the record will display with several options. Click **Start Visit**.

Note: If the ID entered does not match any Recipient, a “no results found” message displays.

The direct care worker can still call in and out by starting an unknown visit.



Recipients

RECIPIENTS SEARCH

820372

Search

Abby Adams

Recipient ID
820372

Medicaid ID
123456789111

Address
1000 Broad St

Columbus, OH 43210-0000

Directions Call

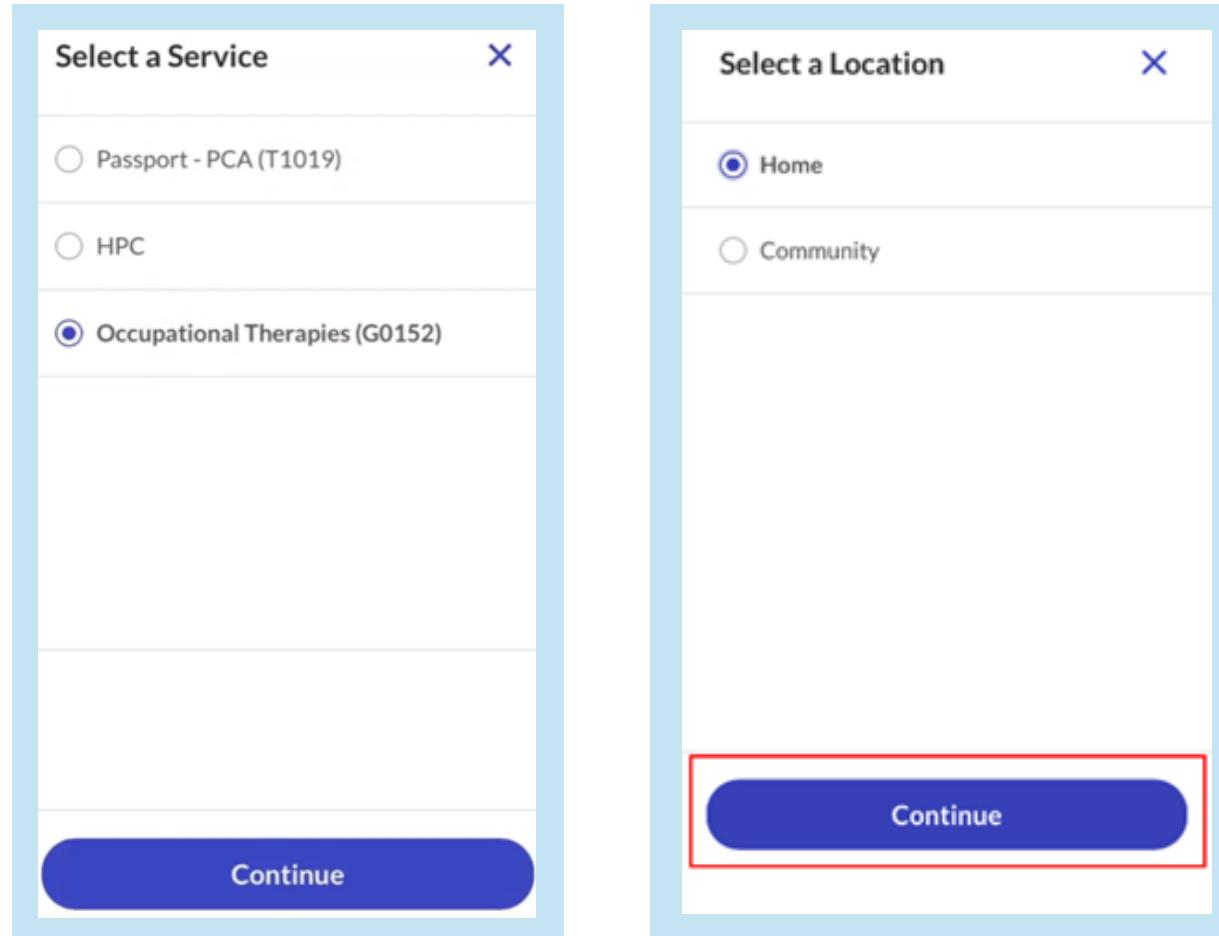
Start Visit

Starting a Visit: Step 2

Indicate the Service being provided using the drop-down list—then click **Continue**.

On the next screen, indicate where the services begin, either Home or Community—then click **Continue**.

Note: The service drop-down list is based upon the Recipient record. If all payers and programs display, it means the Recipient record does not have a defined service.



The image displays two sequential screens from a mobile application. The first screen, titled 'Select a Service', shows a list of three options: 'Passport - PCA (T1019)', 'HPC', and 'Occupational Therapies (G0152)'. The third option is selected, indicated by a blue radio button. The second screen, titled 'Select a Location', shows two options: 'Home' and 'Community'. The 'Home' option is selected, indicated by a blue radio button. Both screens feature a large blue 'Continue' button at the bottom. The 'Select a Location' screen has a red box drawn around the 'Continue' button.

Select a Service

Passport - PCA (T1019)

HPC

Occupational Therapies (G0152)

Continue

Select a Location

Home

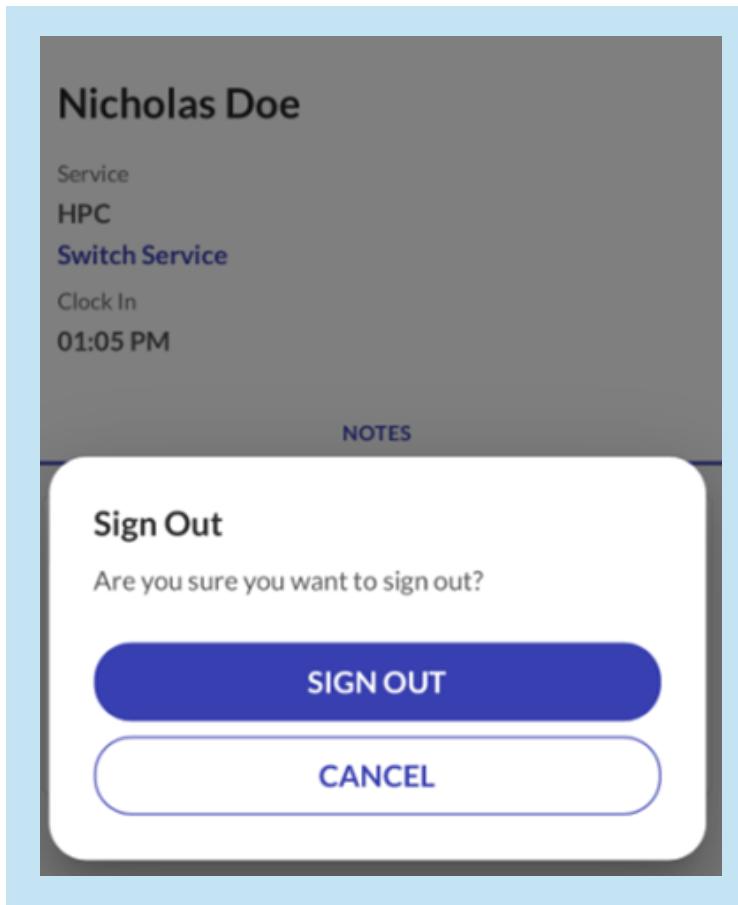
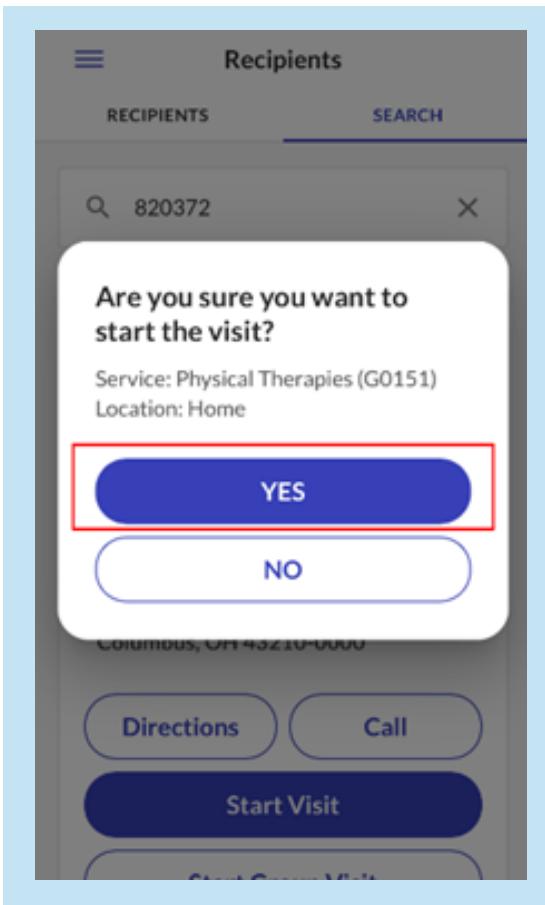
Community

Continue

Starting a Visit: Step 3

A pop-up screen appears asking the user to confirm the start of the visit. Click **Yes**. The visit is now in progress.

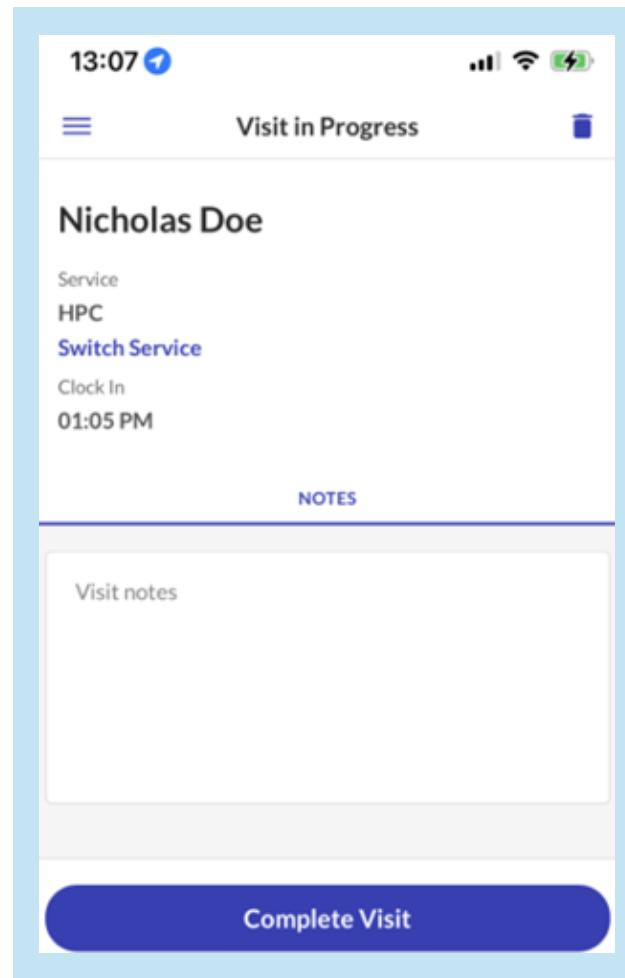
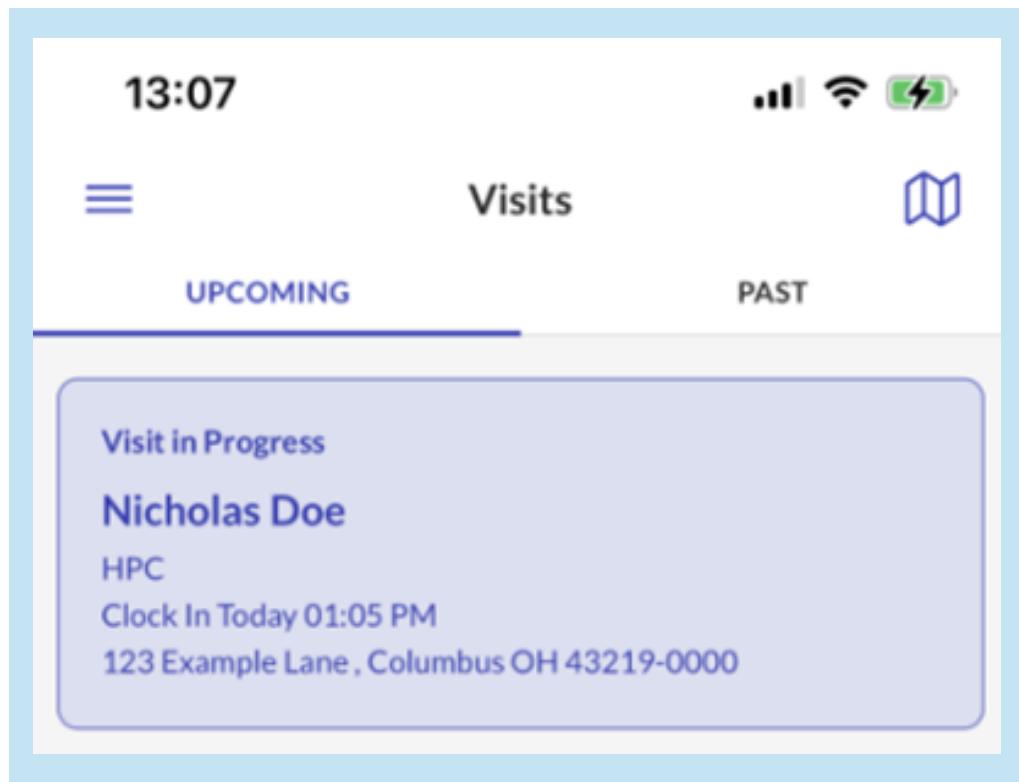
Click **Sign Out** and proceed with providing care.



Note: SMC will continue to log hours worked while the user is signed out.

Completing a Visit: Step 1

After logging in to the SMC application, the in-progress visit will display on the home screen. Click the **Visit in Progress**. The Visit Note screen displays. Enter notes if applicable, then click **Complete Visit**.



Completing a Visit: Step 2

Indicate where the services ends, either **Home** or **Community**—then click **Continue**.

The Visit Summary screen displays. Once you click **Confirm**, the visit is successfully submitted.

Select a Location X

Home

Community

Continue

Visit Summary X

Nicholas Doe

Date: Wednesday, July 26, 2023

Service: HPC

Clock In: 1:05 PM Clock Out: 1:07 PM

Notes:

Confirm

Additional Visit Capture Methods

The SMC application on a personal device is ODM's preferred method of visit capture. However, if you are unable to access the SMC application for various reasons, there are 3 additional ways to record a visit.

Sandata Device

SMC application on a state provided Sandata mobile device.

Agency administrators or independent providers can request a device from [eTRAC](#).

Direct care workers are responsible for maintaining the device.

Telephony

Sandata Telephone Visit Verification (TW) using Call Reference Guides.

Please see the Information for Providers tab on the [ODM EW website](#) for more information.

Manual Visit

Manual visit entry is only permissible when verification through a device with the SMC application or TW is (1) not available or (2) not appropriate based on the immediate needs of the individual.

It is not to be used for routine visit verification.

Importance of Accurate Visit Capture

Accurate visit entry plays an important role in ensuring services are delivered properly. By recording visit information correctly, you help support the individual's care and improve service delivery in Ohio.

Accurate visit capture:



Meets State and Federal Requirements

Ensures ODM and providers comply with federal EVV requirements for Medicaid-funded personal care and home health services.



Enhances Service Quality and Accountability

Helps maintain a clear record of services provided to ensure individuals are receiving appropriate care according to their person-centered services plan.



Supports Timely and Correct Billing

Ensures that billing matches the services delivered—reducing claims denials and leading to quicker payments.



Improves Operational Efficiency

Minimizes the need for manual corrections, follow-up, or re-entry of data.



What factors have helped or hindered your success with EVW?

Are there specific challenges you've faced when registering recipients or recording visits, as well as approaches that have worked well for you?

Type your answer in the chat or raise your hand using the features in Teams.

Electronic Visit Verification Announcements and Resources

Schedule of Meetings

EVV Stakeholder Workgroup meetings are held virtually every month.



Upcoming meetings are scheduled for the following days and times:

- **Monday, September 22 from 2:30 – 4 p.m.**
- Monday, October 27 from 2:30 – 4 p.m.
- Monday, November 24 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 EW program.

Helpful Resources and Trainings

- Looking for helpful resources on the EW website? Browse the [Resource Guide](#).
- Sign up for the monthly EW 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.

THANK YOU

medicaid.ohio.gov