

# 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

The Ohio Department of Medicaid (ODM) is committed to providing access, inclusion, and reasonable accommodation in its services, activities, programs, and employment opportunities in accordance with the Americans with Disabilities Act (ADA), Title VI of the Civil Rights Act, and other applicable laws. To request an interpreter, written information in a language other than English or in other formats (large print, audio, accessible electronic formats, other formats), or a reasonable accommodation due to a disability, please contact ODM's Civil Rights/ADA Coordinator at 614-995-9981/TTY 711, fax 614-644-1434, or email: [ODM\\_EEO\\_EmployeeRelations@medicaid.ohio.gov](mailto:ODM_EEO_EmployeeRelations@medicaid.ohio.gov). Requests should be made at least three business days prior to the scheduled event.

If you believe ODM has failed to provide these services or discriminated in another way, you can file a grievance with ODM's Civil Rights Coordinator and/or file a civil rights complaint with the U.S. Department of Health and Human Services (HHS) Office for Civil Rights. Further information on these processes and ODM's compliance with civil rights and other applicable laws can be found in our [Notice of Nondiscrimination](#).

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.

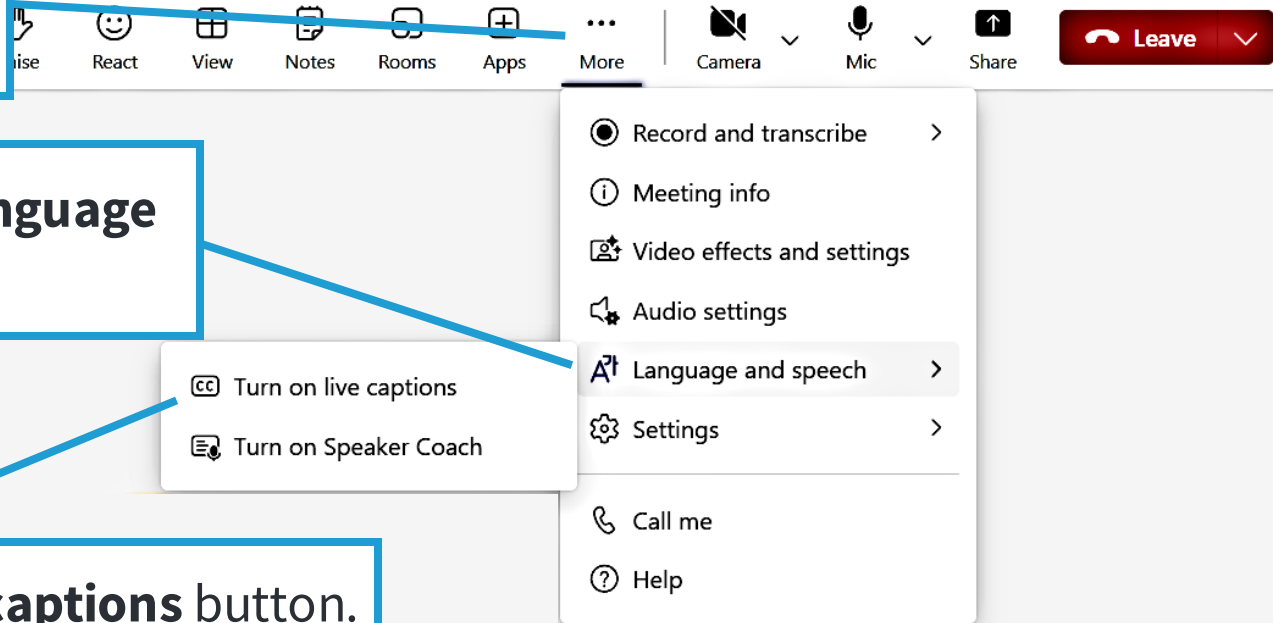
# Accessibility (1 of 3)

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.

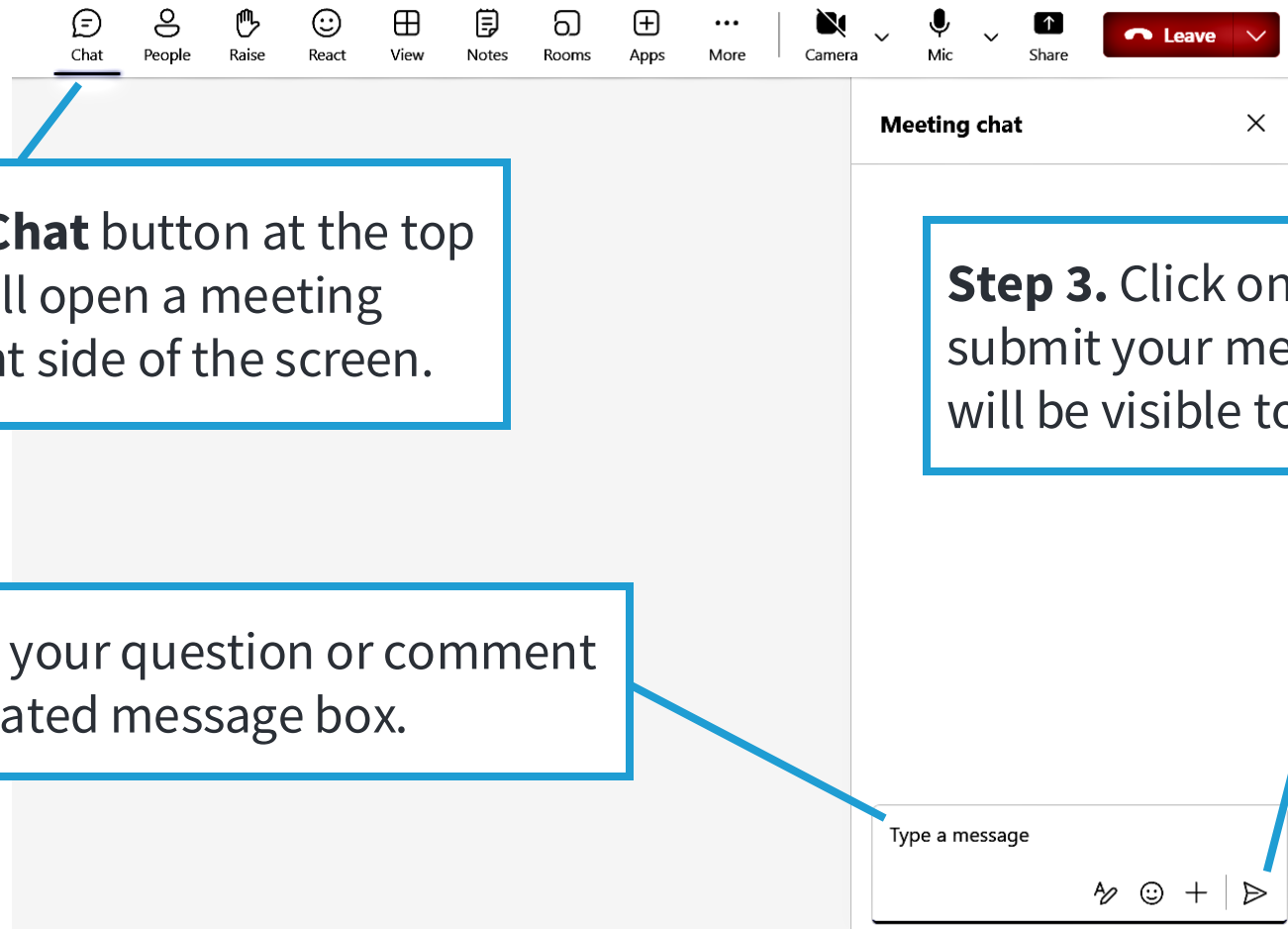
**Step 2.** Hover your mouse over the **Language and speech** button in the dropdown.

**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.



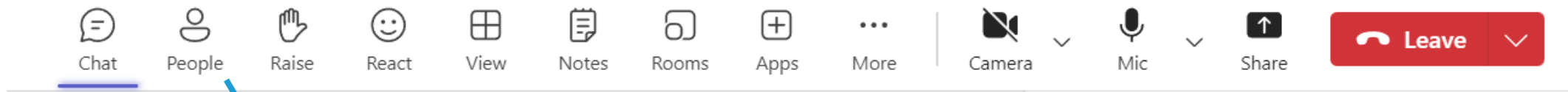
**Step 1.** Click on the **Chat** button at the top of the screen. This will open a meeting chat pane on the right side of the screen.

**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.



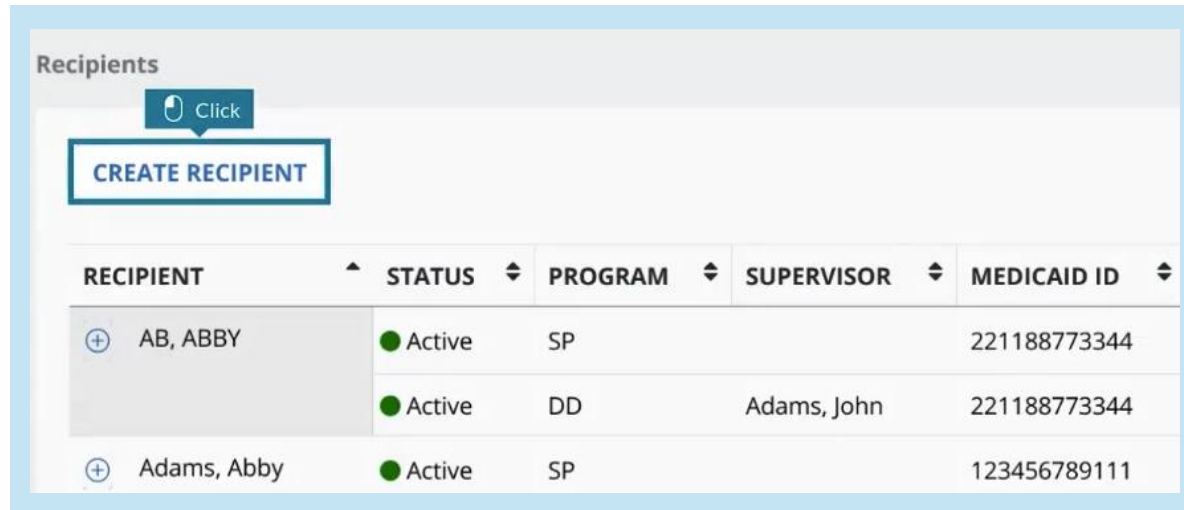
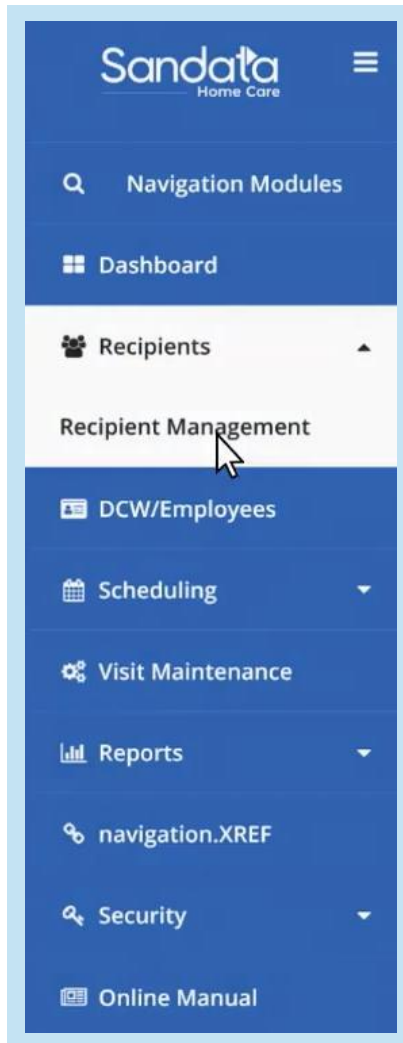
# How to Successfully Register Recipients

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 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.

### New Recipient

\*Required

ODA Only / No Medicaid ID

Newborn

Last Name

Enter Last Name

First Name

Enter First Name

Date Of Birth\*

Enter Date

Program\*

Select Program

Medicaid ID\*

Enter Medicaid ID

SEARCH

Client Payer ID

Enter Client Payer ID

SSN

\_\_-\_\_-\_\_

Phone

( ) \_\_-\_\_

CANCEL

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 managing a Medicaid recipient. At the top, there's a navigation bar with a 'BACK' button, a dropdown menu showing 'MyC | Pending', and links for 'HISTORY' and 'NOTES'. Below this, a status bar displays: '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: 1. 'Identifiers' (with an edit icon) showing 'Recipient ID 553871', 'Medicaid ID 999999994321', 'SSN -', and 'Agency ID 999999994321'. 2. 'Personal Information' (with an edit icon) showing 'Recipient Name: Mary Rollins', 'NewbornNo', 'Date of Birth: February 17, 1958', 'Gender: -', and 'Language: English'. 3. 'Addresses | Phone Numbers' (with an 'ADD' button). To the right of these sections is a 'Contacts' panel with the text 'No contact added. Add one main contact.' and an 'ADD CONTACT' button.

# 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**

Service\*

ECL- Enhanced Community Living

Start Date \*

06/26/2024

End Date

Enter End Date

CANCEL

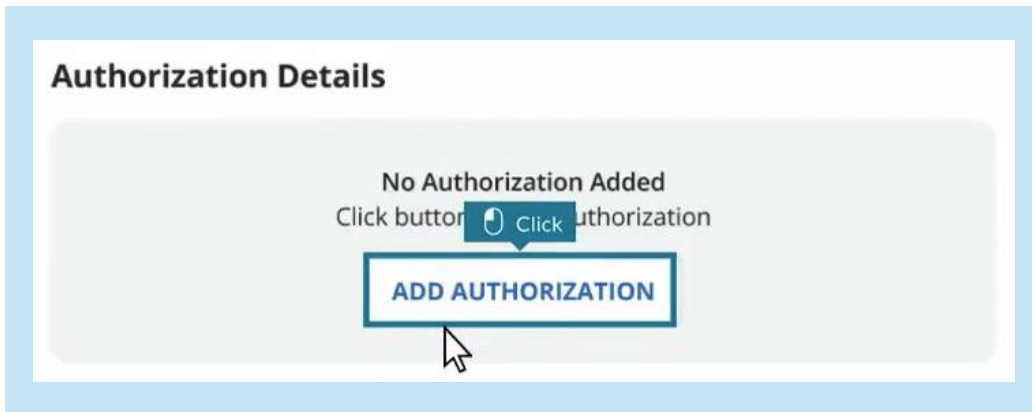
SAVE AND ADD ANOTHER


Click

SAVE

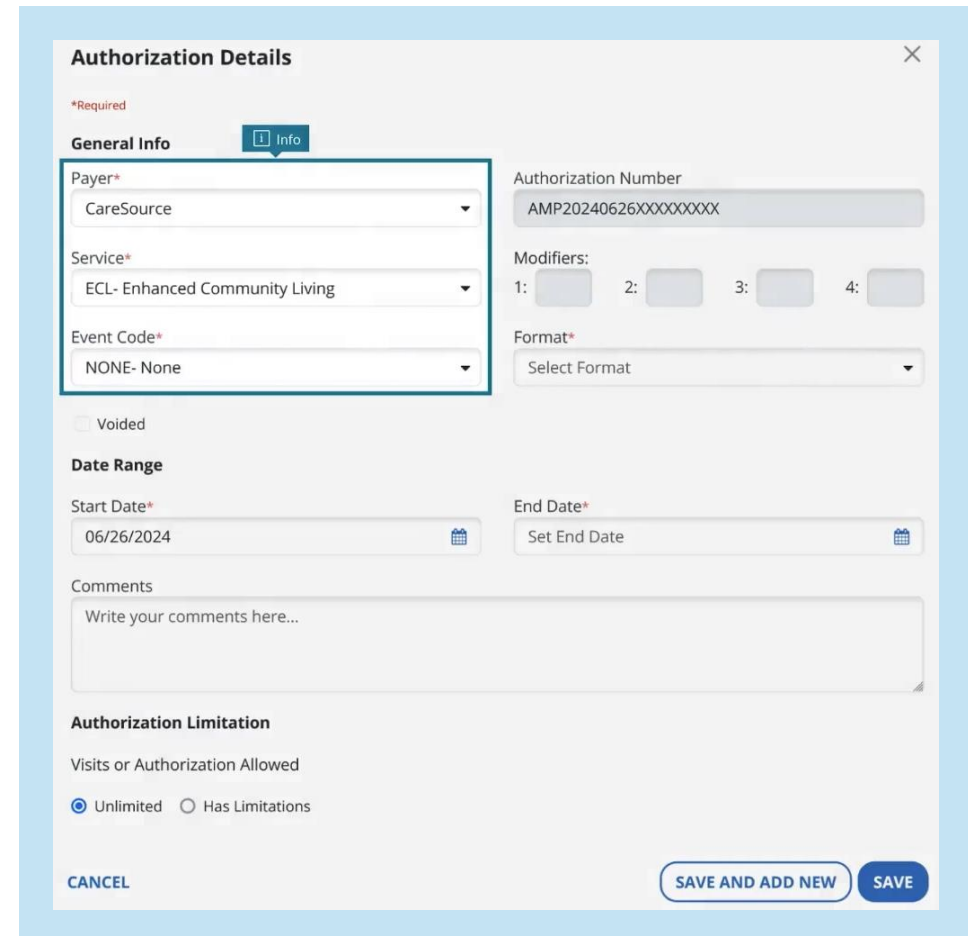
# Registering Recipients: Step 5

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**.



The screenshot shows a light blue box titled "Authorization Details". Inside, a grey box contains the text "No Authorization Added" and "Click button  Click authorization". Below this is a blue button with white text that says "ADD AUTHORIZATION". A mouse cursor is pointing at the button.

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



The screenshot shows a detailed "Authorization Details" pop-up window. It has a close button (X) in the top right. The window is divided into sections: "General Info" (with an "Info" icon), "Date Range", "Comments", and "Authorization Limitation".  
- **General Info:** Includes fields for "Payer\*" (dropdown menu showing "CareSource"), "Service\*" (dropdown menu showing "ECL- Enhanced Community Living"), and "Event Code\*" (dropdown menu showing "NONE- None"). To the right, there is an "Authorization Number" field with the value "AMP20240626XXXXXXXX", "Modifiers:" with four input boxes labeled 1, 2, 3, and 4, and a "Format\*" dropdown menu showing "Select Format".  
- **Date Range:** Includes "Start Date\*" (calendar icon, value "06/26/2024") and "End Date\*" (calendar icon, value "Set End Date").  
- **Comments:** A text area with the placeholder "Write your comments here...".  
- **Authorization Limitation:** Includes the text "Visits or Authorization Allowed" and two radio buttons: "Unlimited" (selected) and "Has Limitations".  
At the bottom, there are three buttons: "CANCEL", "SAVE AND ADD NEW", and "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.

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: -

☒ Voided Auth. ☒ Expired Auth. ADD AUTHORIZATION

### Authorization Details

Payer: CareSource Authorization No: AMP20240626T141905900

Pending

Pend Click

Active

On Hold

Discharged

Cancelled

### 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 Click SAVE

# 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\\_Mobile\\_Connect?hl=en\\_IN&id=com.sandata.smc.prod&pli=1&utm\\_medium=email&utm\\_source=govdelivery](https://play.google.com/store/apps/details/Sandata_Mobile_Connect?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](https://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.

The screenshot shows the 'Recipients' screen in the SMC application. At the top, there is a hamburger menu icon and the title 'Recipients'. Below this are two tabs: 'RECIPIENTS' and 'SEARCH'. The 'SEARCH' tab is selected. A search input field contains the text '820372' and has a red box around it. Below the input field is a blue button labeled 'Search', which also has a red box around it. At the bottom of the screen, there is a section titled 'Missing recipient information?' with the text 'Start an unknown visit and enter the details manually.' and a blue button labeled '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.

The screenshot shows the 'Recipients' screen in the SMC application. At the top, there is a hamburger menu icon and the title 'Recipients'. Below this are two tabs: 'RECIPIENTS' and 'SEARCH'. The 'SEARCH' tab is selected. A search input field contains the text '820372' and has a red box around it. Below the input field is a blue button labeled 'Search'. Below the 'Search' button, the record for 'Abby Adams' is displayed. The record includes the following information: Recipient ID 820372, Medicaid ID 123456789111, Address 1000 Broad St, and Columbus, OH 43210-0000. At the bottom of the record, there are two buttons: 'Directions' and 'Call'. Below these buttons is a large blue button labeled 'Start Visit', which has a red box around it.

## 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.

Select a Service

☐ Passport - PCA (T1019)

☐ HPC

☒ Occupational Therapies (G0152)

Continue

Select a Location

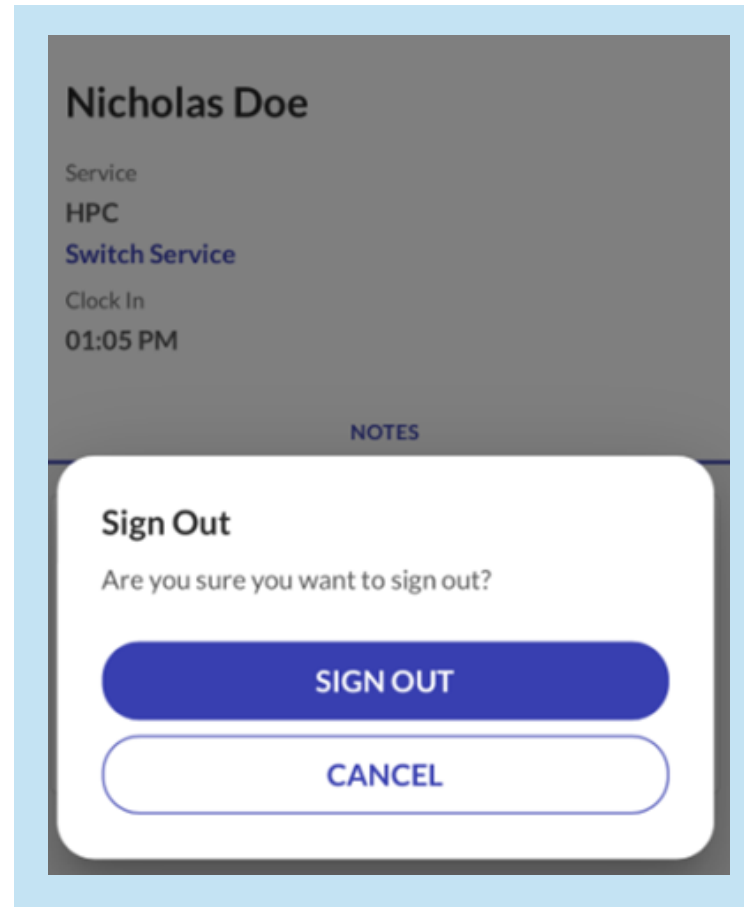
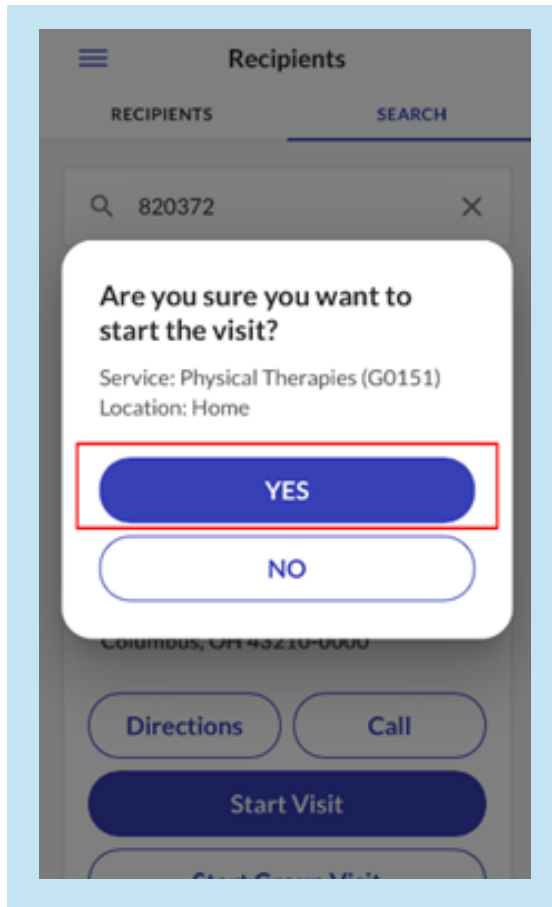
☒ Home

☐ Community

Continue

## Starting a Visit: Step 3

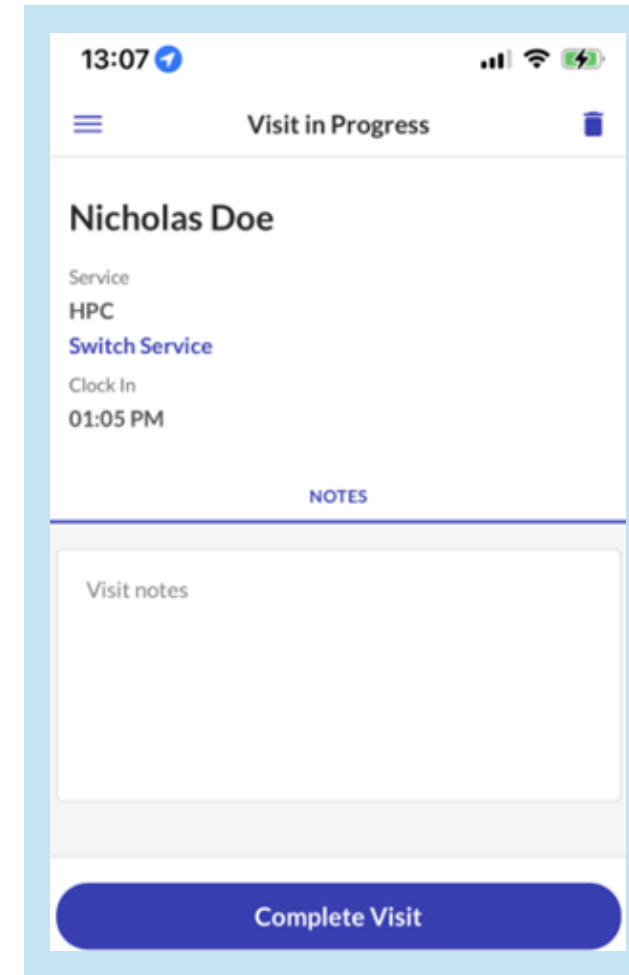
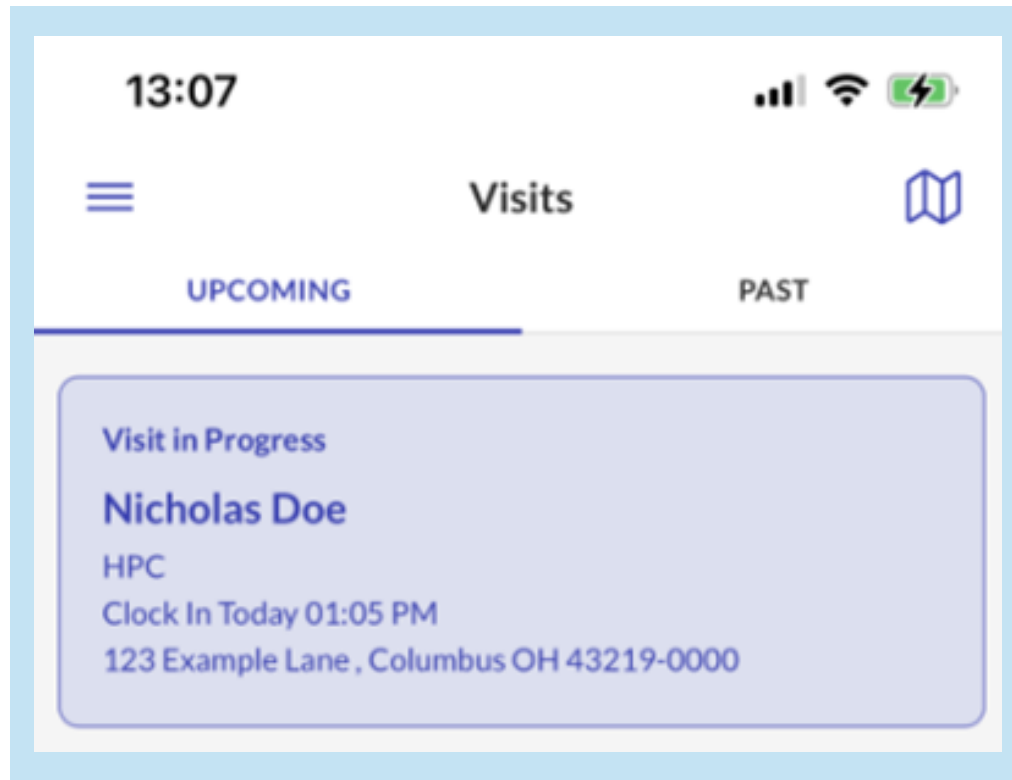
A pop-up screen appears asking the user to confirm the start of the visit. Click **Yes**. The visit is now in progress. Click **Sign Out** and proceed with providing care.



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

# Completing a Visit: Step 1

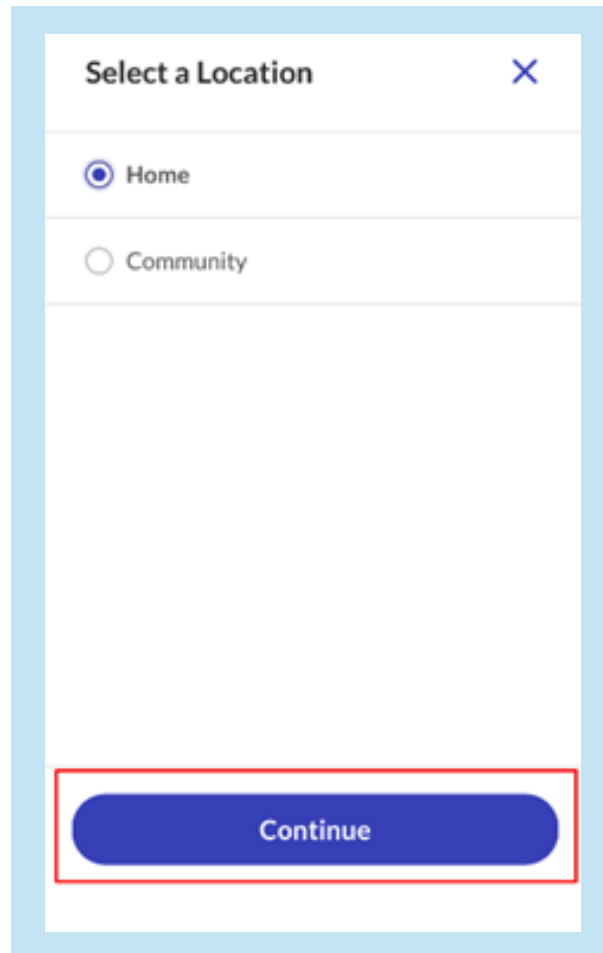
After logging in to the SMC application, the in-progress visit will display on the home screen. Click the **Visit in Progress**. The Visit Note screen displays. Enter notes if applicable, then click **Complete Visit**.



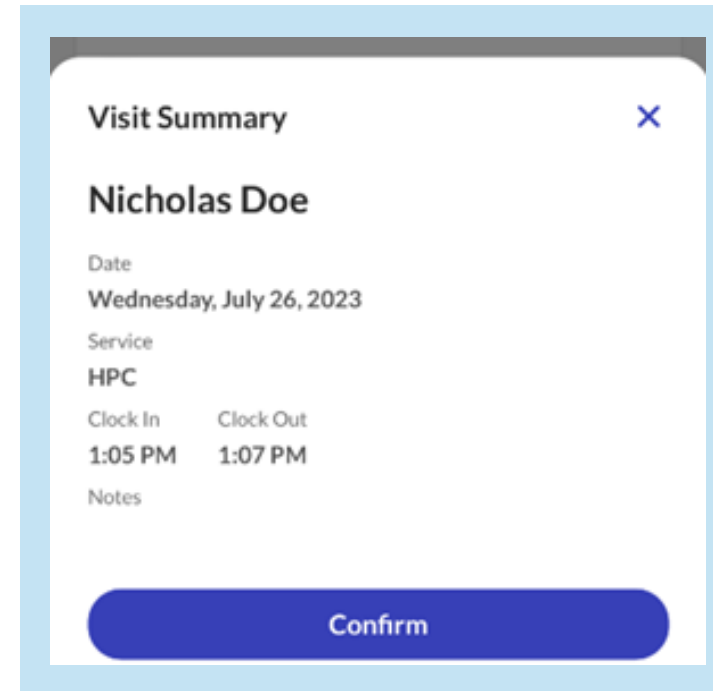
# Completing a Visit: Step 2

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.



The 'Select a Location' screen features a title bar with a close button (X). Below the title, there are two radio button options: 'Home' (selected) and 'Community'. At the bottom of the screen, a blue 'Continue' button is highlighted with a red rectangular border.



The 'Visit Summary' screen features a title bar with a close button (X). The main content area displays the following information: the name 'Nicholas Doe', the date 'Wednesday, July 26, 2023', and the service 'HPC'. Below this, there is a table with two columns: 'Clock In' and 'Clock Out'. The 'Clock In' value is '1:05 PM' and the 'Clock Out' value is '1:07 PM'. At the bottom of the screen, there is a blue 'Confirm' button.

# 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 (TVV) using Call Reference Guides.

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

## Manual Visit

Manual visit entry is only permissible when verification through a device with the SMC application or TVV 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 EVV?**  
**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](https://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](https://medicaid.ohio.gov/evv) for additional information about the EVV program.

## 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](mailto:interagencypolicy@medicaid.ohio.gov).

# THANK YOU

---

[medicaid.ohio.gov](https://medicaid.ohio.gov)