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## Create an OH|ID Account

OH|ID gives you a single, secure account to log into State of Ohio websites and services through a single username and password.

To create your OH|ID, visit [ohid.ohio.gov](https://ohid.ohio.gov) and click on the **Create an account** button.



**Tip:** Choose an easy-to-remember username and password—you'll use this login information to access the Provider Network Management (PNM) module and the Sandata/HHAExchange EVV web portal in later steps.

Next, register for at least two Multi-factor Authentication (MFA) options. This is a second form of verification that the user logging in is who they claim they are.

For detailed instructions visit [creating an OH|ID](#).

# 2

## Enroll in Provider Network Management (PNM)

PNM is Ohio's Medicaid provider system where providers enroll with the Ohio Department of Medicaid (ODM), maintain their information, obtain prior authorization, and submit claims.

If you are a new provider in Ohio, you must submit an application and be approved by ODM before delivering services to an individual. To enroll as a new provider, log in to [PNM](#) using your OH|ID and click on the **New Provider?** button in the top right corner.



**Tip:** Make sure all your information — especially your Primary Service Email Address — is accurate and all required documents are uploaded. Your primary service email address 1 field in PNM must match the email address in your OH|ID account. You will be notified via email if there are any issues with your application.

For more information visit [submitting a new provider application in PNM](#).

# 3

## Select an EVV System to Capture Your Visits

Providers can choose the data collection method that best meets their needs, either:

- The state-provided Sandata/HHAExchange EVV system (at no cost to the provider) **or**
- An Ohio-certified alternate (alt) EVV vendor.

For more information on alt EVV and to view a full list of ODM-certified vendors, visit the **Information for Providers** section of [medicaid.ohio.gov/EVV](https://medicaid.ohio.gov/EVV).

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## Complete the Required EVV Training and Upload Your Certificate to PNM

To receive your Medicaid ID, you must complete required training. This requirement applies whether you use the Sandata/HHAExchange EVV system or an alt EVV vendor.

To get started, sign up for a [SandataLearn](#) account. Since you have not received your official IDs yet, enter **999999** in the Provider ID and Medicaid ID fields.

### If you are using the Sandata/HHAExchange EVV solution:

- Agency providers should assign a lead EVV administrator to complete the required *ODM Sandata/HHAExchange EVV Overview for Agency Providers* training
- Independent providers are required to complete the *ODM Sandata/HHAExchange EVV Overview for Independent Providers* training

### If you are using an alt EVV vendor:

- Agency providers should assign a lead EVV administrator to complete the required *Sandata/HHAExchange Aggregator* training
- Independent providers are required to complete the *Sandata/HHAExchange Aggregator* training

### After completing the training:

- **ODM provider applicants:** Download your completion certificate and upload it to your PNM application.
- **AGE or DODD provider applicants:** Your completion certificate will be uploaded to your PNM application on your behalf. No further action is required.



**Please note:** If you live with the individual you care for and only provide services to them, you **do not** need to take the EVV training. Fill out and upload the [ODM 10376 form](#) to PNM in place of the completion certificate.

For more information, visit the **Trainings and Webinars** section of [medicaid.ohio.gov/EVV](https://medicaid.ohio.gov/EVV).

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## Create an Account in the Sandata/HHAExchange EVV Provider Self-Registration Portal

Once your provider application is approved, you'll receive a Welcome Packet from ODM via email with your Provider Medicaid ID. You'll need this number to create your Sandata/HHAExchange EVV account.

Go to the [Sandata/HHAExchange EVV Provider Self-Registration Portal](#). Select **the Ohio Department of Medicaid** from the dropdown menu and enter your **Medicaid ID and EIN/TIN**. If you are an independent provider, this value will be your SSN unless you have registered for a taxpayer identification number (TIN).



**Please note:** If you live with the individual you care for and only provide services to them, you may be exempt from visit logging requirements. After creating your Sandata/HHAExchange EVV account, you can obtain live-in caregiver exemption approval by filling out and submitting the [online request form](#). Visit [live-in caregiver exemption approval process and the required steps](#) for further instructions.

For more information on registering in the Sandata/HHAExchange Provider Portal:

- [EVV Provider Self-Registration Portal - Sandata/HHAExchange Support](#)
- [EVV Provider Self-Registration Portal - ODM Quick Reference Guide](#)

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## Decide Which Method You Will Use to Capture Your Visits

For the best experience, ODM encourages all providers to record visits using the [Sandata/HHAeXchange Mobile Connect \(SMC\)](#) application (app) on a personal mobile device. The SMC app can be downloaded by visiting the [Google Play Store](#) or [Apple Store](#).

For instructions on logging your visits in the SMC app, visit the [Sandata/HHAeXchange SMC resources page](#).

### Other visit capture methods include:

- The SMC app on a state-provided Sandata/HHAeXchange device
  - ▶ Agency administrators or independent providers can request a device that comes preloaded with the SMC app
- Sandata/HHAeXchange Telephone Visit Verification (TVV)
  - ▶ Call your assigned toll-free number and provide the requested information (Santrax ID, the Recipient's ID, and the Service ID).
- Manual visit
  - ▶ Manual visit entry is only acceptable if you cannot use the SMC app or TVV to record your visit because:
    - ▷ These options are not available **or**
    - ▷ They do not meet the individual's immediate needs.
  - ▶ Manual visit entry should not be used for regular or routine visit verification – only in special cases when other methods are not possible.

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## Register in eTRAC

Once you create your Sandata/HHAeXchange EVV account, register in [eTRAC](#) to receive your EVV Welcome Kit. This kit will include your EVV account number and your designated phone number for TVV (if you choose to use this visit capture method).

eTRAC is also where you can request and manage your Sandata/HHAeXchange device, if applicable.

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## Log in to the Sandata/HHA Exchange EVV Web Portal

You are now ready to officially log in to the [Sandata/HHAeXchange EVV web portal](#). Once you access the Ohio EVV landing page, click on the **Log in to Sandata EVV and Aggregator with OH|ID** button and enter your OH|ID and password.

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## Enter Recipient and Employee Information Into the Sandata/HHAeXchange EVV Web Portal

Once you are logged in to the Sandata/HHAeXchange EVV web portal, the next step is to add your recipients. Every visit must have a recipient to be compliant.

Go to the **Recipients** module in the left-hand navigation menu and click on **Recipient Management**. When the Recipients dashboard appears, click on the **Create Recipient** button and enter your recipient's information. Make sure to assign the services you plan to render as well as EVV authorizations.

It is very important that the recipient information is accurate. Mistakes may lead to mismatched visits and claims, resulting in claims denials.

For more information visit [creating a new recipient record](#) in the Sandata/HHAeXchange EVV system.

If you are an agency provider, you must also enter your employees' information in the system. To do this, go to the **DCW/Employees** module in the left hand navigation menu and click on the **Create DCW/Employee** button.

For more information visit [creating a new employee record](#) in the Sandata/HHAeXchange EVV system.

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## Obtain Signed Consent Before Using GPS Functionality

Global Positioning System (GPS) functionality is optional and cannot be activated until the individual receiving services has provided signed consent. We recommend using [ODM 10375 EVV GPS Consent form](#) to provide consent for GPS logging. You may also use your own consent form if it collects all the data elements contained in the ODM 10375 form.



### Please Note:

- Signed consent must be obtained annually. GPS functionality may not be activated for any annual period in which consent has not been obtained.
- The provider must maintain a copy of the signed consent.
- An individual who has provided consent for GPS functionality may revoke that consent at any time.

For more information about GPS requirements for EVV, visit [OAC Rule 5160-32-02](#).

# 11

## Provide Services to the Recipient and Log Your Visit

Log your visit using your chosen visit capture method.

If you are using an alt EVV system, follow the instructions provided by your chosen alt EVV vendor to log your visit. The required EVV data elements will be submitted to ODM via the Sandata/HHAExchange Aggregator.



**Please Note:** Regardless of the visit capture method you use, all visits must appear with a “Verified” status before you bill for those visits. If you use the Sandata/HHAExchange EVV system, this status is displayed on the Visit Maintenance dashboard in the Sandata/HHAExchange EVV web portal. If you use an alt EVV system, this status is displayed on the Visit Review screen in the Sandata/HHAExchange Aggregator.

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## Submit Your Claim for the Service Provided

Once your visit appears with a “Verified” status on the Visit Maintenance dashboard in your Sandata/HHAExchange EVV web portal (or the Visit Review screen in the Sandata/HHAExchange Aggregator), you can submit your claim. If you need help with claims processes, please reach out to your payer directly.

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## Your Claim Goes through a Series of Validation Steps

After you submit your claim, it is validated against program-specific requirements. Your claim will also be validated against your EVV visit data to confirm:

1. The provider on the claim exists in the EVV Aggregator.
2. The recipient on the claim exists in the provider’s EVV account.
3. The date of service, payer, and procedure code on the claim match the visit data.
4. The units on the claim are equal to or less than the units on the visit.

To be paid, the claim must pass **all** required validation steps.

If your claim is denied, the denial will include an error code. For more information visit [EVV-specific error codes and how to resolve them](#).

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## Review Your Remittance Advice

Once your claim is processed, ODM issues an electronic remittance advice to explain what claims were paid or denied. If denied, the remittance advice will provide the appropriate error code and reason. Review the remittance advice issued directly from your payer.

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## Take the necessary actions to resolve the EVV Errors

The [EVV Error Messages Resource](#) walks you through the required steps to resolve four common EVV errors: **Provider ID does not match**, **Recipient ID does not match**, **Procedure Code does not match**, and **Units do not match**.

### If you need to update your EVV visit data:

- **Sandata/HHAeXchange users:** Go to the Sandata/HHAeXchange Visit Maintenance dashboard.
  - ▶ To access the Visit Maintenance dashboard, log in to the Sandata EVV web portal and click on Visit Maintenance in the left hand navigation menu.
- **Alt EVV users:** Correct the information in your Alt EVV system. Once corrected, log in to the Sandata/HHAeXchange Aggregator to ensure the data is updated as expected.

Once you've resolved the EVV error, you can resubmit the claim.

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## Once Your Claim Passes All Required Validation Steps, the Adjudication System Will Make a Determination Whether the Claim Can Be Paid or Will Deny.

If your claim is denied, the denial will include an error code. For more information, visit [EVV-specific error codes and how to resolve them](#). Additional information on the ODM claims validation process can be found under the ODM Claims Validation Resources section of [medicaid.ohio.gov/EVV](https://medicaid.ohio.gov/EVV).