

How to View EVV Aggregator and Portal Data in Sandata EVV

Intended Audience

The document is for agency providers using the Sandata Aggregator to view visits from an alternate vendor account, while also using the Sandata EVV portal to manage previously logged visits in the Sandata EVV system.

Purpose

This document will help agency providers to view visit data in Sandata. This will help everyone who has access to Sandata EVV Portal and access to the Sandata Aggregator.

Terms and Definitions

Sandata EVV	This is a web-based portal to view and edit provider visit information and records.
Sandata Aggregator	This is a web-based portal to view provider visit information.
Alternate EVV/ Alt EVV	When a provider uses a system other than Sandata's to capture and manage visits.
Agency Contact	The Agency Administrator is the first user of the Alt EVV account in the Aggregator.
User	A person who the Agency Contact gives authorizations to access to the Sandata EVV or the Sandata Aggregator.

Initial Account Setup

The Aggregator shows the visits that the alternate system for visit capture and management sends to Sandata. This includes visits, visit exceptions, client, employee, and user data. Users can only view visits in the Aggregator. The Aggregator ensures the captured visit is correct and billable in the alternate system.

Sandata creates an Alternate EVV account for each agency that completes the Alt EVV Certification process. Sandata will set up the agency contact when we create the Alternate EVV.

Your agency contact will add your authorizations manually for both the Security and in the Security modules of the Sandata Aggregator. **You need to give the same email address (the authorizations) to switch between the Aggregator and the EVV Sandata portal.**

To review adding users in the Security module of EVV, please visit the [Agency Video Training Library](#). To review adding users in the Security module of the Sandata Aggregator, please access and view this link for the Aggregator guide: <https://evv.sandata.com/SJM/Shared/UserManual>

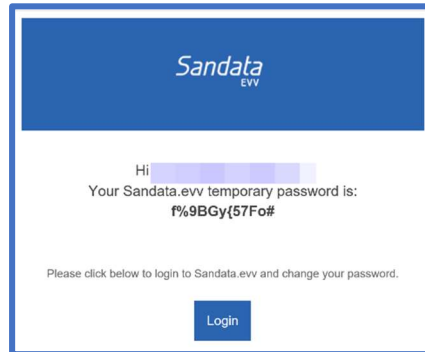
Please note that you must sign into the Aggregator to view the guide.

Logging in to the Aggregator

1. Once your Agency Contact adds you as a user, you, the user, will receive a temporary password to your email address. Within the email there is a link to access the Aggregator. Click login to access the Aggregator login URL.

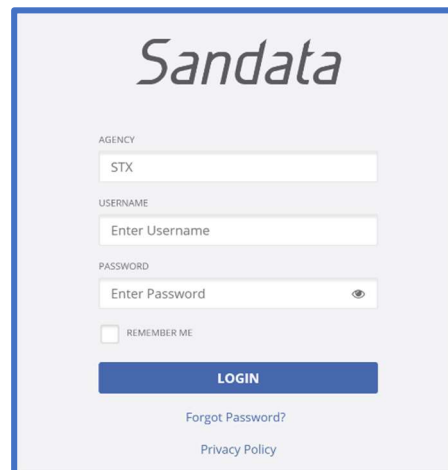
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*If you do not recall receiving a temporary password in the last 24 hours, start from Step 2.



2. You can manually access the Sandata Aggregator login page at any time by going to <https://evv.sandata.com>. Please use these supported browsers for the Sandata Aggregator: Microsoft Edge, Mozilla Firefox, and Google Chrome.

The login screen will look like this:

A screenshot of the Sandata EVV login page. The page has a light gray background with the Sandata logo at the top. Below the logo are three input fields: "AGENCY" with "STX" entered, "USERNAME" with "Enter Username" as a placeholder, and "PASSWORD" with "Enter Password" as a placeholder and an eye icon for visibility. Below the password field is a "REMEMBER ME" checkbox. At the bottom is a blue "LOGIN" button, and below that are links for "Forgot Password?" and "Privacy Policy".

3. Leave the Agency field with just the "STX" in box. You do not need to enter any agency information after the STX. This shows that you want to log into the Aggregator.
4. In the username field, enter the email address to which you received your authorizations.

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AGENCY
STX

USERNAME
Enter Username

5. Enter the temporary password from your temporary password email. Click the “eye” icon if you want to see your password.

PASSWORD
Enter Password

REMEMBER ME

LOGIN

6. Click login. This will lead you to the screen to set up your own password.

LOGIN

[Forgot Password?](#)

[Privacy Policy](#)

Note: If you do not have a temporary password in your email inbox, click the “Forgot Password” link underneath the login fields to enter your email address and receive a temporary password now.

Then, complete step 3. **If you receive an invalid authorizations error when you click “Reset Password,” you have not been set up as a user in the Aggregator portal. Please reach out to your Agency Contact for them to add you as a Security user in the Aggregator.**

EMAIL ADDRESS *
Enter Email Address

RESET PASSWORD

EMAIL ADDRESS *
mike12345@mailinator.com

RESET PASSWORD

Back to Login

Error
Active user not found when attempting to delete user

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- On the password-reset screen, re-enter the temporary password in the “Old Password” field and then choose a new password. Passwords are case sensitive, and have twelve characters, including a capital letter, a lowercase letter, a number, and a “special” character like a question mark (?), or a dollar sign (\$). Click SAVE to save your new password. You now have unique login authorizations to Sandata Aggregator.

Aggregator Portal Information

Once you log in, you will see that you are on the Visit Review tab. This means that you can view visits in a read-only mode, and the menu bar will say "Sandata Aggregator" on the left.

Providers who use the Sandata EVV system to log visits in the Sandata Aggregator before they switched to an alternate system, would have an editable view of visits in the Sandata EVV Portal and a read-only view of their alternate system.

If an agency provider has the same email address for their alternate system, then they can log in once and view both the Sandata EVV Portal and the Sandata Aggregator account.

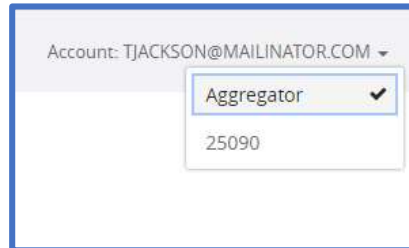
To do this, you would log in using the steps on pages 1-3 of this document. Then:

- Look in the upper right-hand corner of the screen where we list your username. Then, click on the arrow to the right of your username. When you click on the drop-down

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arrow, you will see the Aggregator listed for your read-only alternate-system Aggregator account. and your Sandata EVV Portal account with a checkmark beside the account you are currently viewing.

Note: You may also see your account number for your alternate system account listed. You can either select Aggregator or the alternate system account itself to view your read-only alternate system information in the Sandata Aggregator.



If you select your Sandata EVV portal account, you will notice the menu bar changes from "Visit Review" to "Visit Maintenance" and from "Sandata Aggregator" to "Sandata EVV." Once you are in the Sandata EVV portal, you can view and manage visits or data.

