



**Ohio Department  
of Medicaid**

# Electronic Visit Verification

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Policy Changes and System Enhancements  
Webinar

August 1, 2024



# Today's Agenda

1. Electronic Visit Verification (EVV)
2. Single Sign-On (SSO)
3. Signature Validation
4. Live-in Caregiver Exemption
5. Global Positioning System (GPS) Consent
6. Getting Started with EVV: Step-by-Step Process Overview
7. Authorizations
8. Additional Information and Resources

# Overview of Electronic Visit Verification

## Electronic Visit Verification Overview

**Electronic Visit Verification (EVV) uses technology to document certain home health and personal care services provided in the home or community.** EVV is efficient, transparent, and improves service delivery. Direct care workers check in at the beginning and check out at the end of each visit through use of a digital device or landline telephone.

EVV is mandated through the federal 21st Century Cures Act, Public Law No. 114-255 (114th Congress). Ohio providers began using the EVV program in 2018.

# Federal and State Regulations

Ohio Medicaid EVV rules can be found in [Ohio Administrative Code 5160-32](#). Four separate rules address EVV.

[OAC 5160-32-01](#)

## **Electronic Visit Verification Program:**

This rule focuses on impacted programs and services.

[OAC 5160-32-02](#)

## **Electronic Visit Verification Data Collection:**

This rule focuses on requirements and processes for EVV data collection.

# Services Subject to Electronic Visit Verification

## State Plan Service

- State Plan Home Health Aide
- State Plan Nursing – RN or LPN
- Private Duty Nursing
- **Physical Therapy**
- **Occupational Therapy**
- **Speech Therapy**
- **RN Assessment**
- **RN Consultation**

## Medicaid Waivers

- Personal Care Service
- Home Care Attendant Service
- Homemaker Personal Care
- Waiver Nursing – RN or LPN
- **Enhanced Community Living**
- Participant Directed Personal Care Service
- Choices Home Care Attendant Service
- Participant-Directed Homemaker Personal Care
- **Nursing Delegation Consultation – RN**
- **Nursing Delegation Assessment – RN**

## Electronic Visit Verification Overview Continued

The EVV system captures the following visit information:

- ✓ **Who receives** the service
- ✓ **Who provides** the service
- ✓ **What service** is provided
- ✓ Whether the service is **provided in the individual's home or community**
- ✓ The **date and time** the service begins and ends

\* Important to note: Recipient record must reflect the correct Payor for the service being provided.

## Federal and State Regulations Continued

Ohio Medicaid EVV rules can be found in [Ohio Administrative Code 5160-32](#). Four separate rules address EVV.

[OAC 5160-32-03](#)

### **Alternate Electronic Visit Verification Vendor:**

This rule focuses on policies and procedures for working with an alternate EVV vendor instead of the state-contracted vendor, Sandata Technologies, LLC.

[OAC 5160-32-04](#)

### **Electronic Visit Verification Program Providers:**

This rule focuses on expectations and policies for providers and financial management service vendors.

# Single Sign-On

## Single Sign-On: Overview

This change impacts agencies, independent providers and state users.

This change does not impact direct care workers who are employees of an agency.

### The system change:

- Agencies, independent providers, and state users must have an OHID account to access the EVV aggregator/EVV web portal or tickets within Zendesk.
- Only one OHID account is needed.

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### Next step:

- If you have not already, please create an OHID account. If you already have an OHID account, no further action is needed.

# Single Sign-On: Using Your OHID

- Once you have an OHID, or if you already have one, access Sandata systems on the [Sandata's Ohio EVV landing page](#). There, you will be directed to log in using your OHID.

**Ohio (OH ODM)**

Login to the Sandata EVV Portal and Aggregator.  
Attention Providers: if you need assistance signing in or acquiring your OHID, please contact the ODM Integrated Help Desk at 800-686-1516 or email [ihd@medicaid.ohio.gov](mailto:ihd@medicaid.ohio.gov).

[Follow](#)

[Log in with OHID](#) [Ohio Medicaid EVV Webpage](#)




# Single Sign-On: Creating an OHID Account

**OHID**  
Ohio's Digital Identity.  
One State. One Account.  
Register once, use across many State of Ohio websites

[Create account](#)

Log In

OHID

Password 

Log in

[Forgot your OHID or password?](#)

- If you do not have an OHID account, please click **Create account** and refer to the [OHID MFA Job Aid](#) for more information.
- When registering for OHID, you must use the same email address that was used to access Sandata's aggregator and EVV portal prior to July 1, 2024.

## Single Sign-On: Troubleshooting

- **If you are receiving any error messages and you work for an agency:**
  - Some error messages occur when your email address in the Sandata system does not match the email address associated with your OHID account. Please contact your administrator for help with changing your email address.
  - You can also contact Sandata directly via the EVV Provider Hotline at 855-805-3505.
- **If you do not work for an agency, do not know your email address in the OHID account, or need additional OHID assistance:**
  - Please contact the Ohio Medicaid Integrated Help Desk at 800-686-1516. Choose Option 7.

# Signature Validation

# Signature Validation: Overview

This change impacts agencies, independent providers, and direct care workers.

## The policy change:

Recipient verification was previously optional and is no longer available in the EVV system.

- If you use the Sandata system, fields indicating recipient verification of time, service, signature, and voice recording have been removed.
- If you use an alternate vendor, you also do not need to obtain recipient verification for purposes of EVV.

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**Next step:** This policy has gone into effect and no further action is required.

# Live-in Caregiver Exemption

## Live-in Caregiver Exemption: Overview

This change impacts direct care workers.

### The policy change:

If a direct care worker is a resident of the same household as the individual receiving services, **they can be exempt** from visit capture requirements **once ODM approval has been granted.**

If a direct care worker is an employee of an agency and is not an independent or self-directed provider, they may be required to document data elements in another manner.

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### Next step:

If you believe you are eligible for this exemption, please fill out and return [\*\*ODM Form 10374\*\*](#).

## Live-in Caregiver Exemption: Obtaining ODM Approval 1 of 2

1. Provider fills out [ODM Form 10374](#).
2. Gather required documentation to verify your shared address. Examples may include:
  - Utility bills
  - Current state ID or driver's license
  - W2
  - Tax return

Steps continue on next slide.

## Live-in Caregiver Exemption: Obtaining ODM Approval 2 of 2

3. Before you submit, provider must ensure the direct care worker or employee record and the recipient record are in the Sandata EVV system.
  - Note: For those using an alternate vendor, fiscal management service, or both, the direct care worker or employee record must be documented in the EVV aggregator system.
4. Submit ODM Form 10374 and all required documentation through an encrypted email to [EVV@Medicaid.Ohio.Gov](mailto:EVV@Medicaid.Ohio.Gov) or fax to 614-318-4956.

**Decisions regarding approval will be sent via email.**

**Direct care workers must continue to log all services subject to EVV until the submitted EVV exemption request is approved by ODM.**

# Global Positioning System Consent

# Global Positioning System Consent: Overview

This change impacts direct care workers.

## The policy change:

Capturing global positioning system (GPS) coordinates is **optional** and may only be done with written consent of the person receiving services.

Location must be captured at the start and end of the visit by documenting the location as either taking place in the individual's home or community.

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## Next step:

Obtain written consent for use or do not use.

## Global Positioning System Consent: Providing Consent

- We recommend using [ODM Form 10375](#) to provide consent for GPS capture.
  - You may also use your own consent form if it collects all the data elements contained in the ODM form.
- Providers must demonstrate that consent has been obtained and maintained.
  - Consent is effective from the date of recipient's signature on the form for a period of one year or 365 calendar days.

**ODM, Ohio Department of Aging (ODA), Ohio Department of Developmental Disabilities (DODD), or their delegates may request proof of consent at any time.**

## Global Positioning System Consent: Additional Information

- Consent for the use of GPS may be revoked at any time.
  - If consent is revoked, the consent form must be updated to reflect the person's decision.
- When the recipient does not provide consent to capture GPS for EVV purposes, the provider must turn off the GPS capture of a visit.

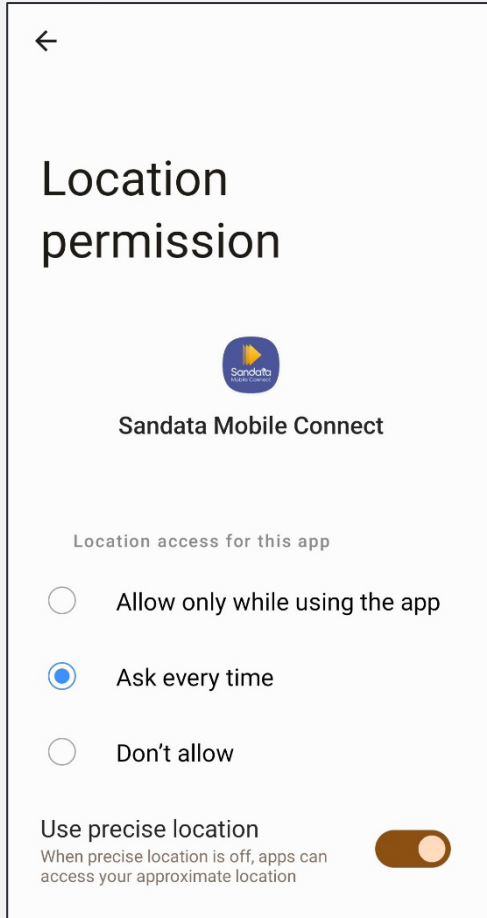
# GPS Consent: How to Turn GPS Off on iPhone – Guidance for Sandata Users



**For those using the Sandata solution**, you can turn GPS off in your phone settings. When using an iPhone, the setting can be controlled by following these steps:

1. Open the settings menu on your personal smart device.
2. Select the SMC application.
3. Under "Allow Location Access," select "Ask Next Time Or When I Share." Make sure that the "Precise Location" toggle is moved to the right.

# GPS Consent: How to Turn GPS Off on Android – Guidance for Sandata Users



**For those using the Sandata solution**, you can turn GPS off in your phone settings. When using an Android, the setting can be controlled by following these steps:

1. Open the settings menu on your personal smart device.
2. Select the SMC application.
3. Under "Location Permission," select "Ask every time." Make sure that the "Use Precise Location" toggle is moved to the right.

# Getting Started Step-by-Step Process Overview


# Step 1

Apply in the [Provider Network Management \(PNM\) Module](#) and log in using your **OHID**

The screenshot shows the top navigation bar of the Ohio Department of Medicaid website. On the left, there is a 'Menu' icon and the 'Ohio Department of Medicaid' logo. The main navigation menu includes 'Provider Network Management', 'Medicaid Home', 'Learning', 'Contact', 'Sign Up', and 'Login'. Below the navigation bar, the page title is 'Log in' with the subtext 'All users must log in on the OH|ID portal using their single sign on ID.' A prominent dark button labeled 'Log in with OH|ID' is centered on the page. Below this button, an orange callout box contains the text: 'Attention Providers: if you need assistance signing in or acquiring your OH|ID, please contact the ODM Integrated Help Desk at 800-686-1516 or email [ihd@medicaid.ohio.gov](mailto:ihd@medicaid.ohio.gov)'.

# Step 2

## Create a [Sandata Learn](#) account and complete EVV training



You need to log in or sign up before continuing.

Email address

Password

**Sign In**

[Forgot my password](#)

[Sign Up](#)

[Click here for Support](#)

### Create an account


First Name

Last Name

Email address

Password

**Sign Up**



Agency Name

Agency ID # (Optional)

Medicaid ID #

Provider ID #

Select a role

Select a state

Agency EVV

Non-Agency EVV

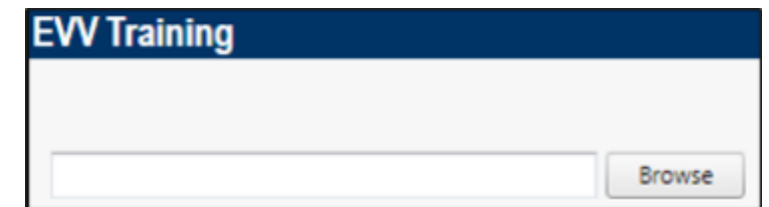
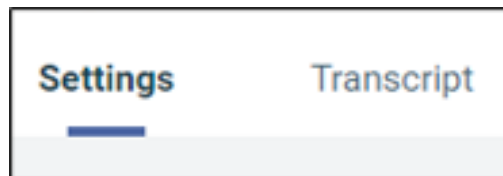
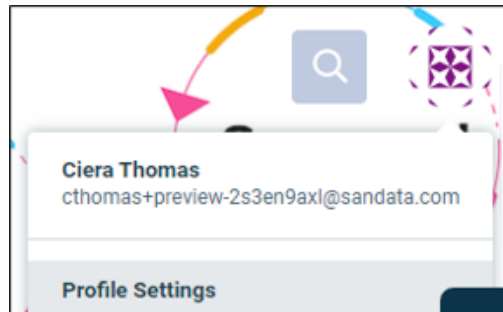
Alt EVV Aggregator

**Submit**

## Step 3

### Download EVV training certificate and upload it to the PNM Module

- After completing training, click the square icon in the upper right-hand corner of the screen. Then select **Transcript**. Your certificate will display along with the option to print.
- On the PNM Module, scroll down on the **Required Documents** page/section and locate the blue box labeled **EVV Training** to upload documentation showing completion of EVV Training.



## Step 4

### Review email from ODM that contains provider Medicaid ID number

- Beginning later this year, new providers will see the below information in their ODM welcome letters once a Medicaid ID is assigned:  
  
For providers subject to EVV requirements outlined in OAC Chapter 5160-32, please go to the [Sandata self-registration portal](#). For additional information or to see if this applies to you, please visit [ODM's EVV website](#).

## Step 5

### Create an account in the [Sandata Provider Registration Portal](#)

- Once you have obtained a Provider Medicaid ID number, register in the [Sandata Provider Registration Portal](#). You must have a Provider Medicaid ID number to complete registration.

Please enter your unique provider identifier for the EVV program:

**ENTER PROVIDER MEDICAID ID \***

Enter Provider Medicaid ID

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Register

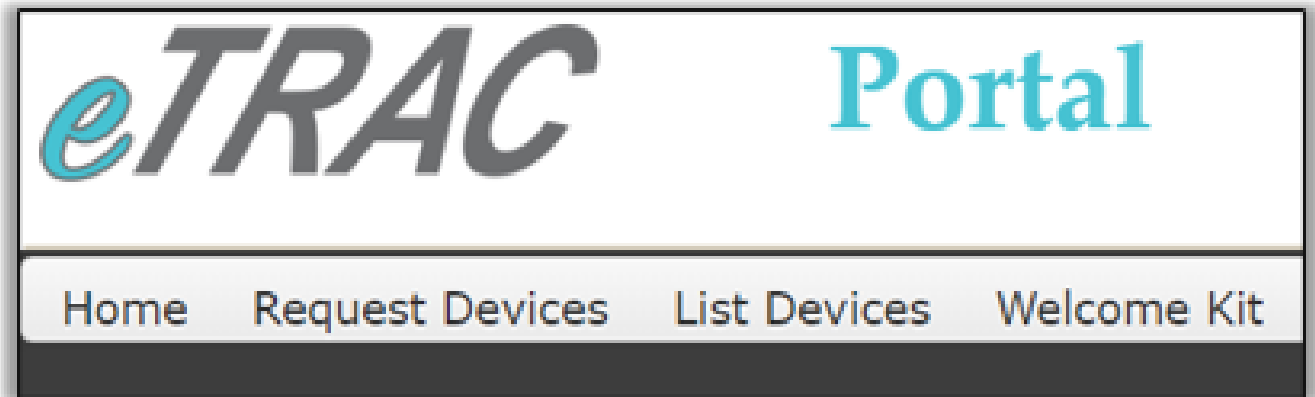
## Step 6

### Access [eTRAC](#)

Once you have created your account in Sandata's provider registration portal, register in [eTRAC](#) to download Welcome Kit materials for visit capture.



The screenshot shows the eTRAC Login interface. At the top, there is a tab labeled "eTRAC Login". Below it, there are two input fields: "Email Address" and "Password". The "Password" field has a small eye icon to its left. Below the input fields are two buttons: "Login" and "Register". At the bottom of the form, there are two links: "Forgot your password?" and "Forgot your email address?".



## Step 7

### Log in to the EVV portal

- Once you have created your account in Sandata's provider registration portal, please visit [Sandata's Ohio EVV landing page](#) and select the **Log in with OHID** button.

#### Ohio (OH ODM)

Login to the Sandata EVV Portal and Aggregator.

Attention Providers: if you need assistance signing in or acquiring your OH|ID, please contact the ODM Integrated Help Desk at 800-686-1516 or email [ihd@medicaid.ohio.gov](mailto:ihd@medicaid.ohio.gov).

Follow

Log in with OH|ID

Ohio Medicaid EVV Webpage



## Steps 8-11

### Setup your EVV system

The following information pertains only to those using the Sandata system

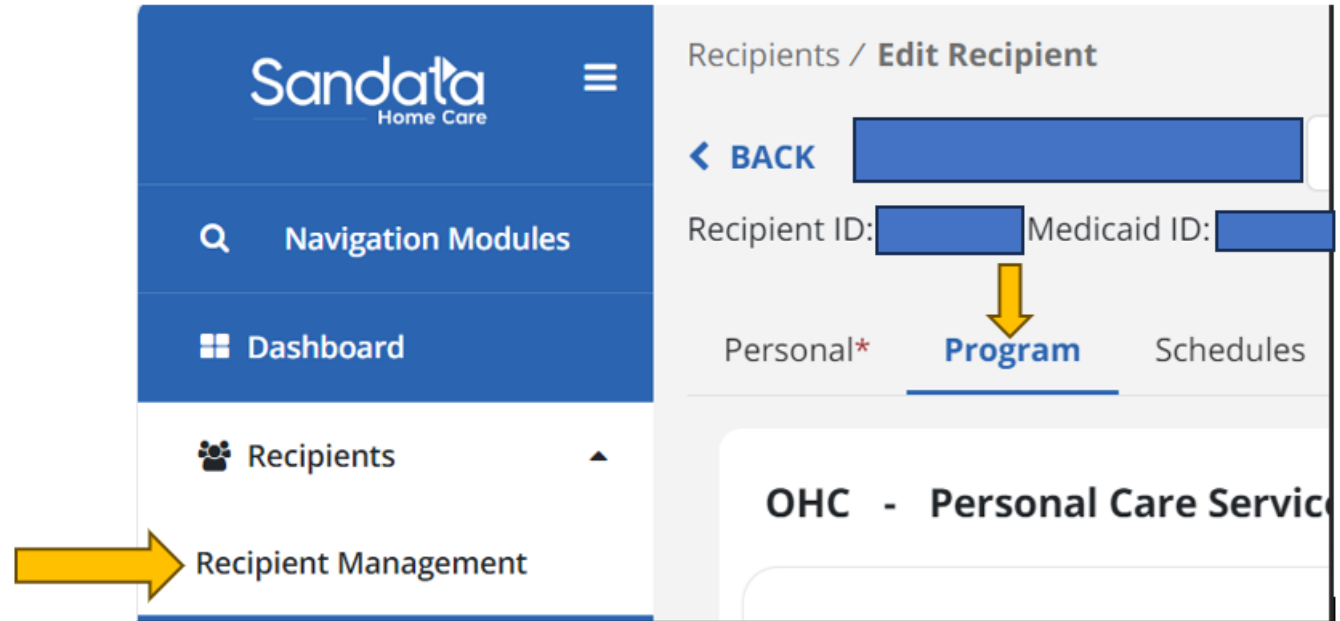
- Determine which method, or methods, of visit capture you will use.
  - Sandata Mobile Connect on a personal device is the preferred method.
- Begin to create system records.
  - Recipient Records – Agencies and Independent Providers.
  - DCW/Employee Records – Agencies Only.
  - User Records – Agencies Only.
- Refer to [Sandata On-Demand](#) for resources and help.

# Authorizations

**The following information on authorization pertains only to those using the Sandata system.**

# Authorizations: Overview

An authorization in the Sandata system is the **record that links the recipient and the provider.**



## Authorizations: Additional Information

- Authorizations are not necessary to capture a visit.
  - However, authorizations are necessary to get a visit in the **Verified** or **Processed** statuses. Visits must be in either of these two statuses to be eligible to be matched to a claim.
- Without an authorization that matches the payer, program, and service on the visit for the recipient, the visit will show an **Unauthorized Service** exception.
- If a correct authorization is added after the visit is captured, the system will automatically resolve the issue if the authorization covers the date of the visit.
- For more information on creating authorizations visit [Creating an Authorization](#) on Sandata On-Demand.

# Authorizations: Locked Authorizations

- Sandata migrated the payer, program, and service details to create an active authorization to provider accounts.
- Some migrated authorizations still appear on the recipient screen as locked and are unable to be edited at this time.

The screenshot displays a user interface for managing authorizations. At the top, there are two toggle switches: 'Voided Auth.' and 'Expired Auth.', both of which are turned on. To the right of these toggles is a button labeled 'ADD AUTHORIZATION'. Below this is a card titled 'Authorization Details'. The card contains the following information: Payer: DODD, Authorization No: [blurred], Service: HPC, Modifiers: -, Event Code: NONE- None, Format: Hours, Start Date: 10/24/2022, End Date: 12/31/2050, and a Comment field. In the top right corner of the card, there are two icons: a pencil (edit) and a trash can (delete).

- If a user sees an authorization that is locked and they are unable to edit the authorization, or the authorization is inaccurate, they can delete the authorization by clicking the **Bin Icon** and create a new one.

# Additional Information and Resources

## Additional Information and Resources 1 of 3

Team	Topic	Contact	Question Topics
<b>Sandata EVV Provider Hotline</b>	EVV	<p data-bbox="672 385 1472 454">855-805-3505</p> <p data-bbox="672 542 1472 682"><u><a href="mailto:ODMCustomerCareEmail@sandata.com">ODMCustomerCareEmail@sandata.com</a></u></p> <p data-bbox="672 771 1472 1219">The EVV Provider Hotline is available as follows: Monday – Friday 8:00 am – 7:00 pm Saturday – Sunday 9:00 am – 5:00 pm</p>	<ul data-bbox="1480 385 2502 868" style="list-style-type: none"><li>• EVV devices</li><li>• Getting started with EVV</li><li>• EVV visit maintenance</li><li>• Sandata and alternate EVV</li><li>• Technical support</li></ul>

## Additional Information and Resources 2 of 3

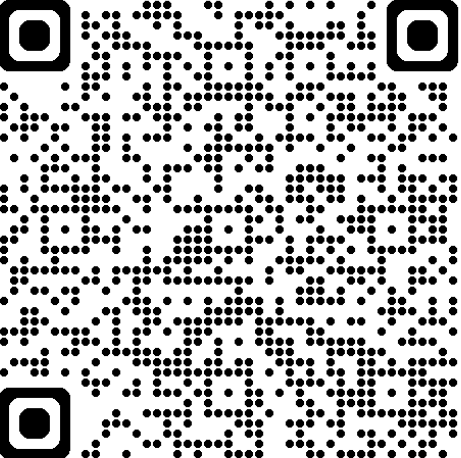
Team	Topic	Contact	Question Topics
<b>ODM EVV Program Operations</b>	EVV, Claims	<u><a href="mailto:ODMEVV@sandata.com">ODMEVV@sandata.com</a></u>	<ul style="list-style-type: none"><li>• Live in exemption form and process</li><li>• Services subject to EVV</li><li>• EVV and claims matching logic</li><li>• Alternate EVV requirements</li></ul>
<b>ODM EVV Policy</b>	EVV	<u><a href="mailto:HCBSPolicy@medicaid.ohio.gov">HCBSPolicy@medicaid.ohio.gov</a></u>	<ul style="list-style-type: none"><li>• OAC rule questions</li><li>• GPS consent form</li><li>• EVV policy questions</li></ul>

## Additional Information and Resources 3 of 3

Team	Topic	Contact	Question Topics
<b>ODM Integrated Helpdesk</b>	EVV, Claims	800-686-1516 <a href="mailto:IHD@medicaid.ohio.gov">IHD@medicaid.ohio.gov</a>	<ul style="list-style-type: none"><li>• Single Sign-On, OH ID, or portal password support</li><li>• Ohio Medicaid Enterprise System submitted claims, prior authorization, and other administrative tasks</li><li>• General Medicaid member eligibility questions</li><li>• Provider Network management module</li></ul>

# Website Redesign

<https://medicaid.ohio.gov/resources-for-providers/special-programs-and-initiatives/electronic-visit-verification>



Medicaid / Resources for Providers / Programs & Initiatives / Electronic Visit Verification

## Electronic Visit Verification

On this page, you will find information about Electronic Visit Verification (EVV) in Ohio. This information is for all audiences including, but not limited to, providers, individuals receiving services, and case managers. Below you will find key links and resources for EVV, as well as detailed information about the program.

### Getting Started with EVV

Expand All Sections

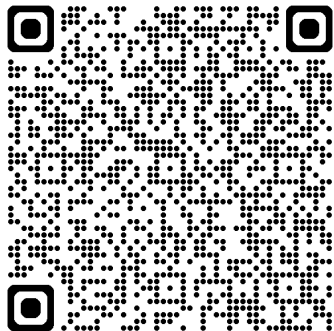
- What is Electronic Visit Verification? ✓
- Which Services Require EVV? ✓
- What's the Latest on Electronic Visit Verification in Ohio? ✓
- Additional Information ✓

# Updated Resources

**Who must do  
EVV?**



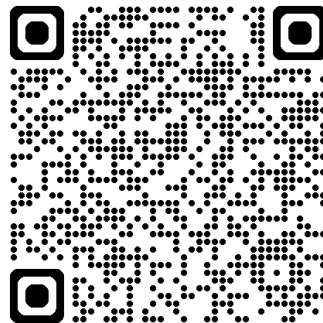
[EVV Covered Programs and Services](#)



**Where can I get  
quick answers?**



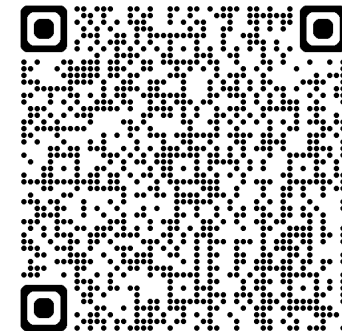
[EVV FAQ July 2024](#)



**What's been  
happening since  
January 2024?**

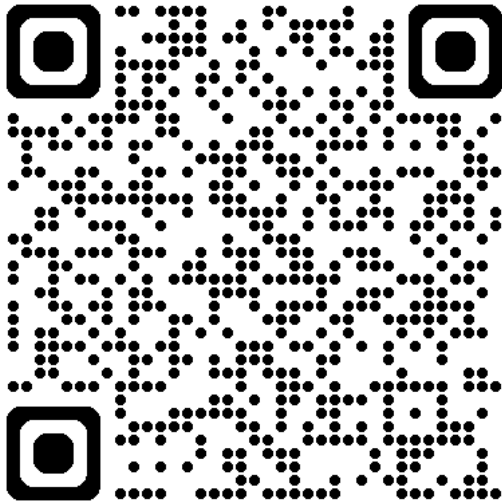


[Newsletters \(ohio.gov\)](#)



# Stay Informed

[Subscribe Form | Medicaid](#)  
[\(ohio.gov\)](#)



## Sign-up to receive news and information from the Ohio Department of Medicaid

You may change your subscription preferences at any time using the links provided in each mailing.

Email \*

Hover over the list below to learn about each topic. Select the topics you are interested in receiving messages from:

- Behavioral Health Bulletin Newsletter
- Care Coordination News
- Comprehensive Maternal Care (CMC)
- Comprehensive Primary Care (CPC)
- EVV stakeholders
- EVV alt vendors
- EVV agency providers
- EVV non-agency providers
- Home- and Community-Based Waiver Programs
- Hospital Handbook Transmittal Letters

# THANK YOU

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