Getting Started in EVV

Intended Audience: Agency Providers and Non-Agency Providers
NOTE: This webinar will begin 5 minutes after the start time.
Developed November 2021

Sound Test

We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

This presentation is intended solely for non-agency providers and agency providers that are using the Sandata Electronic Visit Verification (EVV) system, provided by the state, to record visits. Agency providers using an alternate vendor for visit capture and management need to make all edits in their Alternate EVV system.
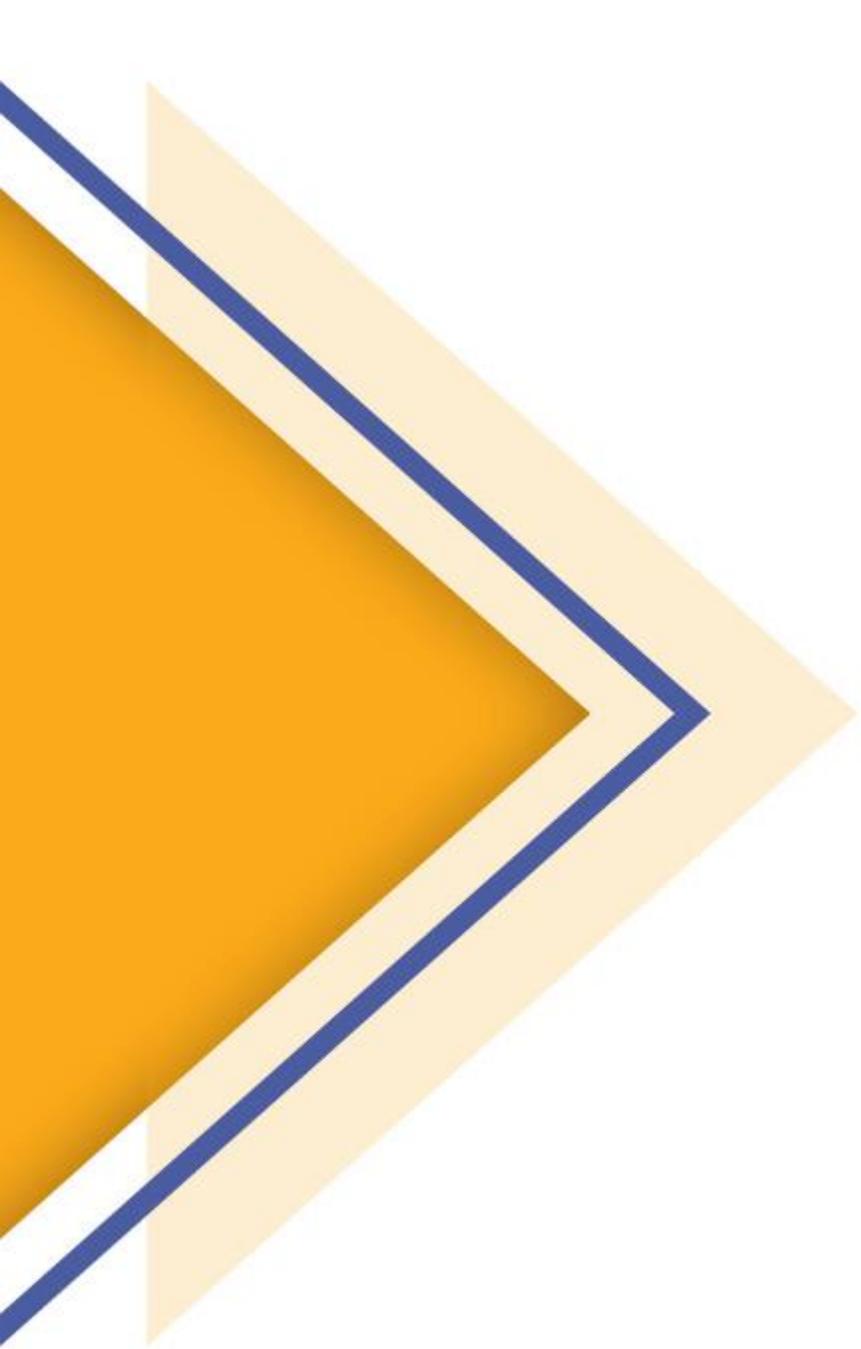
Agenda

- Review Terms and Definitions
- Complete EVV Training
- Register in eTRAC and Download Welcome Kit
- Login to Sandata EVV
- Create Users*
- Create Employees*
- Create Clients (Individuals)

*Agencies only

Review Terms and Definitions

Review Terms and Definitions

Agency Provider: An entity that provides care to an individual and records services using EVV

Non-Agency Provider: An individual provider who provides care and records services using EVV

Sandata EVV Portal: The online portal used by agency and non-agency providers to manage Sandata EVV visits and records

Review Terms and Definitions

Client: An individual who receives services subject to EVV requirements

Employee: A person who is employed by an agency provider to provide care to one or more clients (individuals)

User: A person with a unique login and password to the Sandata EVV portal

Review Terms and Definitions

eTRAC: The portal used to access the Sandata EVV Welcome Kit materials

- eTRAC is also used to request, manage, and return ODM EVV devices. EVV devices can also be requested directly in the EVV portal.

Welcome Kit: PDF documents that explain how to log into Sandata EVV and record visits
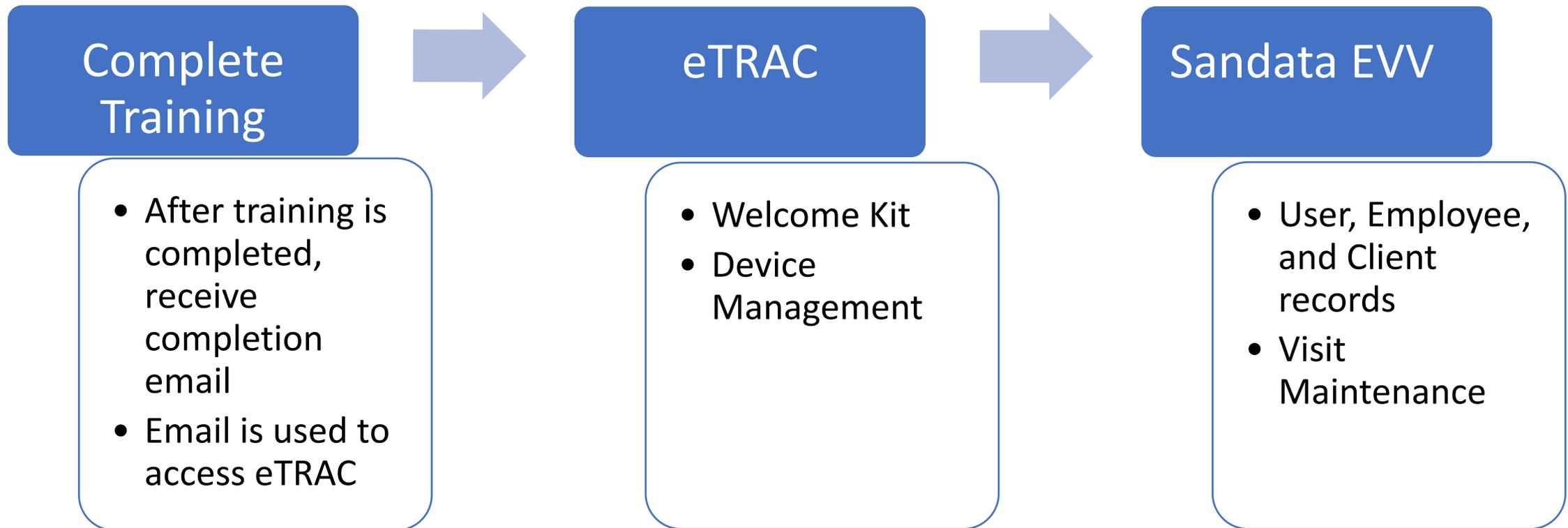
Review Terms and Definitions

Sandata Mobile Connect (SMC): Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on a Sandata EVV device

Telephony: Sandata's telephone visit recording option; providers dial an automated line and answer questions to record a visit.

EVV Setup Process

Complete Training

- After training is completed, receive completion email
- Email is used to access eTRAC

eTRAC

- Welcome Kit
- Device Management

Sandata EVV

- User, Employee, and Client records
- Visit Maintenance

Complete EVV Training – For Agency and Non-Agency

Complete EVV Training

- EVV training is the first step to obtain credentials and start capturing EVV visits

- Training is completely online

- Separate trainings for an Agency and Non-Agency providers

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Complete EVV Training

- If you are not sure if you have completed training, check your email for a training completion email from noreply@myabsorb.com

- You can also reach out to the EVV Provider Hotline for assistance, at 855-805-3505, or ODMCustomerCareEmail@sandata.com

Complete EVV Training – Non-Agency

Ohio
Department
of Medicaid

Required Modules:

Course	Duration	Content Overview
Overview	60 mins	This course supplies an overview of the modules in the Sandata EVV system. The course covers login requirements, common elements, functionality available throughout the system, an explanation of the different modules, and a description of information available within each module. It also includes an introduction to running standard reports available in the Sandata EVV system.

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Complete EVV Training – Agency

Required Modules:

Course	Duration	Content Overview	Intended Audience
Overview	60 mins	This course supplies an overview of the modules in the Sandata EVV system. The course covers login requirements, common elements, functionality available throughout the system, an explanation of the different modules, and a description of information available within each module. It also includes an introduction to running standard reports available in the Sandata EVV system.	Designated Agency Representative/Security Administrator
Security	40 mins	This course covers how users are added, managed, and deleted from an Agency's EVV account. Agency providers need this course to set up administrative users who will manage the Agency's portal account.	Designated Agency Representative/Security Administrator

Complete EVV Training – Completion Email

Ohio
Department
of Medicaid

Hi Thomas Smith,

Congratulations!

You have successfully completed the following course:
Ohio Department of Medicaid - Electronic Visit Verification (EVV) Phase 3 Agency Overview

Now that you have completed your EVV training, here are the next steps to take:

1. Download your training completion certificate and keep it for your own records. You can access your certificate by following these steps:

   - Log into the training registration site where you signed up for training.
   - Click the menu icon in the upper right-hand corner of the screen.
   - Click Transcript.
   - Click the link to your training completion certificate to view and print it.

2. Go to eTRAC at https://etraconline.net/login.

3. Click register to create an account in eTRAC (you will need your provider Medicaid ID for initial account registration), or click Login if you have already registered.

4. Retrieve your Welcome Kit by:

   a. Clicking the Welcome Kit tab

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Complete EVV Training – Completion Email

b. Clicking the Download button next to each Welcome Kit document. (Be sure to read your Welcome Kit Letter, which will provide your EVV login credentials!)

Your Welcome Kit will become available in eTRAC within 24 hours after you have completed training. If at first, you do not see the Welcome Kit tab, please check back at a later time.

5. Request a device for the Individual(s) you are providing care to under the EVV program, for an expected duration of more than 90 days. Refer back to your training manual for the steps on how to do this, if needed.

6. Please provide the following link to your office staff so they can review self-paced training videos:

https://fast.wistia.net/embed/channel/vkywg2l6bp

7. Please use the below link to access the training manual on the ODM website. Please refer to the eTRAC & Device Management chapter on how to access your Welcome Kit and the Data Entry section on how to set up the EVV system.

https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Agency-Guide.pdf

If you have any questions on this information or need assistance, please contact the EVV Provider Hotline at 1-855-805-3505 or email: odmcustomercareemail@sandata.com.

Register in eTRAC and Download Welcome Kit

Register in eTRAC

The training completion email will contain a link to eTRAC

Hi Thomas Smith,

Congratulations!

You have successfully completed the following course:
Ohio Department of Medicaid - Electronic Visit Verification (EVV) Phase 3 Non Agency Overview

Now that you have completed your EVV training, here are the next steps to take:

1. Download your training completion certificate and keep it for your own records. You can access your certificate by following these steps:

   - Log into the training registration site where you signed up for training.
   - Click the menu icon in the upper right-hand corner of the screen.
   - Click Transcript.
   - Click the link to your training completion certificate to view and print it.

2. Go to eTRAC at https://etraconline.net/login.

3. Click register to create an account in eTRAC (you will need your provider Medicaid ID for initial account registration), or click Login if you have already registered.

Register in eTRAC

Click Register
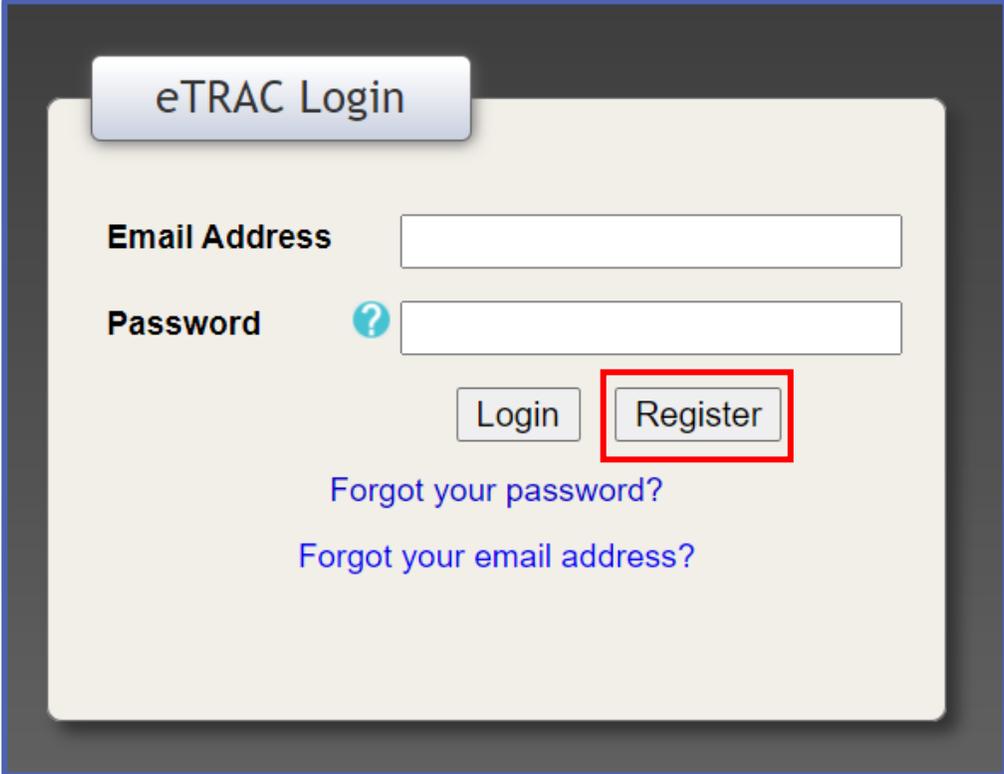
Register in eTRAC

Enter your provider Medicaid ID number, then re-enter to confirm

Register in eTRAC

Enter your email address

Register in eTRAC

Complete the required fields to finish registration

Register in eTRAC

Sign in with your new username and password

Register in eTRAC – Additional Agency Users

- Agencies with multiple eTRAC users need to take certain steps to create additional credentials for those users

- For more information on registering additional users in eTRAC, please see the Agency Provider Participant Guide, page 77

Download the Welcome Kit

Click Welcome Kit
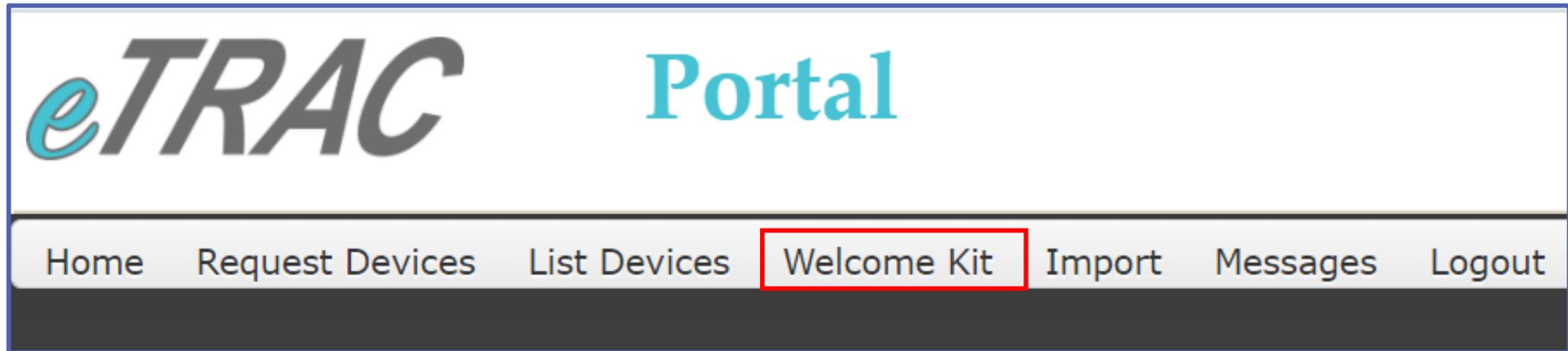
Download the Welcome Kit

Download the Welcome Kit materials

Welcome Kit Files	
Filename	**Download**
CallReferenceGuide-GroupVisit-MultiLanguage.pdf	Download
CallReferenceGuide-MultiLanguage.pdf	Download
CallReferenceGuideEnglish - Copy.pdf	Download
CallReferenceGuideEnglish-GroupVisit.pdf	Download
CallReferenceGuideEnglish.pdf	Download
GettingStartedBooklet.pdf	Download
ServiceList.pdf	Download
WelcomeKitLetter.pdf	Download

Download the Welcome Kit

Welcome Kit Letter: Login information for Sandata EVV, Welcome Kit document summary, and contact information for questions

- Non agency providers: this is where you will see your Sandata Mobile Connect information

Download the Welcome Kit

Getting Started Booklet: Login information for Sandata EVV, and how to save and view bookmarks on the internet

Download the Welcome Kit

Call Reference Guide: Instructions for recording a visit using the telephone

- The different call reference guides are to assist with different types of visits
- Example: group visits have their own call reference guide

Calling Instructions   STX 267178

Calling In: When arriving at the client's home, make sure you have the following information:
- Your Santrax ID.
- Your Client's ID.

1. Dial any of the toll-free numbers assigned to your agency.
   If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.

   Santrax will say: "Welcome, please enter your Santrax ID."

2. Press the numbers of your Santrax ID on the touch tone phone.

Calling Instructions   STX 267178

Calling Out: When leaving the client's home, make sure you have the following information:
- Your Santrax ID.
- The Service ID.
- The Client is available to verify the visit.

9. Follow steps ❶ thru ❹ to and then continue.

   Santrax will say: "Please select (1) to call in or (2) to call out."

10. Press the (2) key to "Call Out."

    Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."

Download the Welcome Kit

Service List: A list of services and associated service codes that are used with the call reference guide when recording a visit using the telephone

English Service List

	Company Name		
	Phone Numbers		
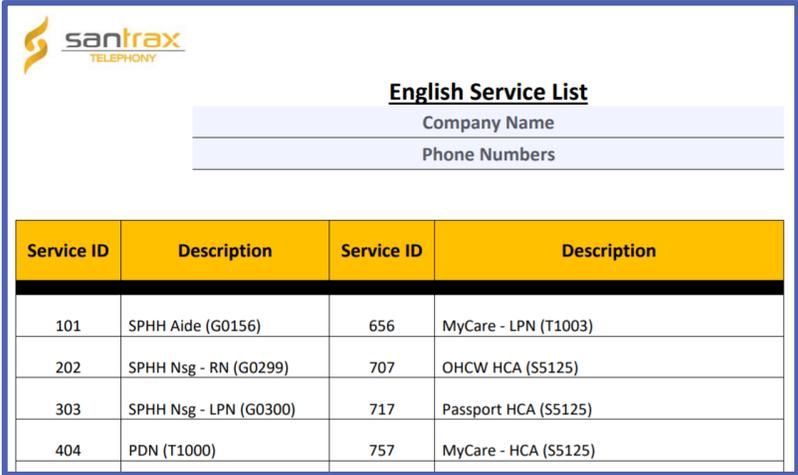
Service ID	Description	Service ID	Description
101	SPHH Aide (G0156)	656	MyCare - LPN (T1003)
202	SPHH Nsg - RN (G0299)	707	OHCW HCA (S5125)
303	SPHH Nsg - LPN (G0300)	717	Passport HCA (S5125)
404	PDN (T1000)	757	MyCare - HCA (S5125)

This list is also available on the ODM EVV homepage: https://medicaid.ohio.gov/static/Providers/EVV/Providers/TVV_Service_ID_List_Agency.pdf

Login to Sandata EVV: For Agency and Non-Agency

Login to Sandata EVV

You can find your login information in the Getting Started booklet or the Welcome Kit Letter – the credentials should be the same

Accessing the EVV System

Company Name:
Test637 JUnit637

URL: https://evv.sandata.com/

ACCOUNT ID: 267178

USER: junit.test637@sandata.com

PASSWORD: X#f1bqzp

The username and temporary password to access your agency's **Sandata EVV account** (for EVV visit review & maintenance) are:

- Agency: 267178
- Username: junit.test637@sandata.com
- Password (Temporary): X#f1bqzp

Login to Sandata EVV

Enter https://evv.sandata.com in your internet browser window
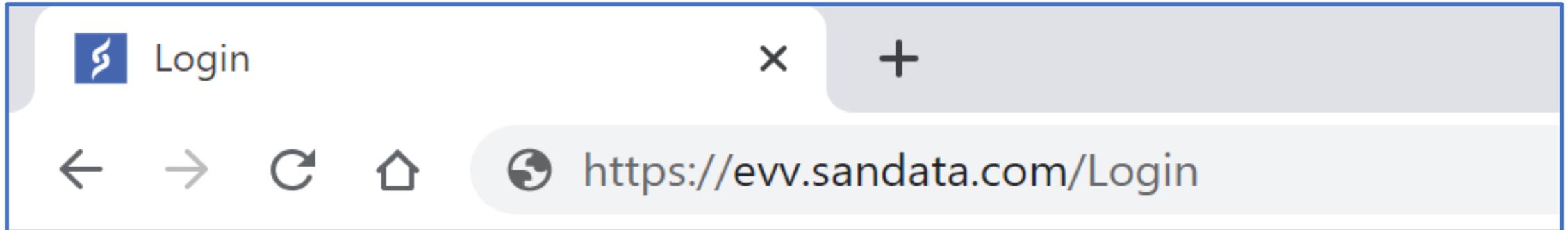
Login to Sandata EVV

Enter the agency, username, and password

Accessing the EVV System

Company Name:
Test637 JUnit637

URL: https://evv.sandata.com/
ACCOUNT ID: 267178
USER: junit.test637@sandata.com
PASSWORD: X#f1bqzp

AGENCY
STX267178

USERNAME *
junit.test637@sandata.com

PASSWORD *
X#f1bqzp

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Login to Sandata EVV

Use the "remember me" checkbox to save your agency and username fields, then click Login
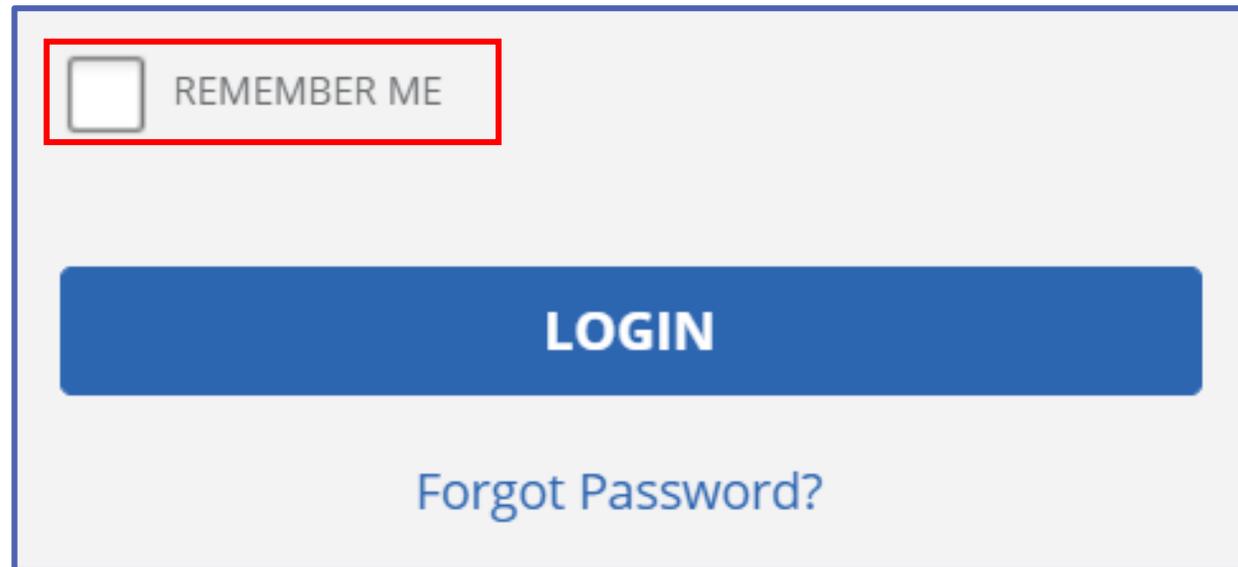
Login to Sandata EVV

After clicking "login", you will be prompted to create a new password

Accessing the EVV System

Company Name:
Test637 JUnit637

URL: https://evv.sandata.com/
ACCOUNT ID: 267178
USER: junit.test637@sandata.com
PASSWORD: X#f1bqzp

OLD PASSWORD *

Enter Old Password

NEW PASSWORD *

Enter New Password

CONFIRM NEW PASSWORD *

Confirm New Password

Note: Password is case sensitive

SAVE

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Create Users – For Agency Providers Only

Create Users

- Agency accounts can have multiple users managing visits and records in Sandata EVV

- Each user must have their own unique credentials

- Credentials are created in the Security tab of Sandata EVV

Create Users

Click Security, then click Manage Users
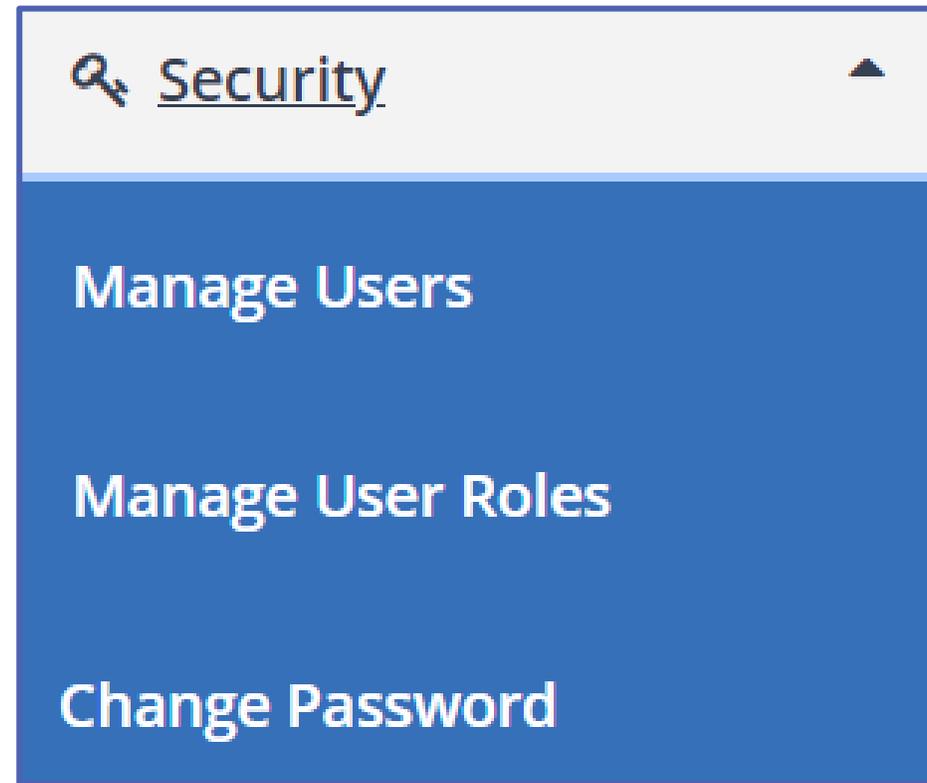
Create Users

Click Create User

Create Users

Complete all required fields in the basic section of the record, then scroll down to the roles section

* indicates required field

USERNAME/EMAIL *

Enter Username/Email

USERNAME/EMAIL CONFIRMATION *

Enter Username/Email Confirmation

LAST NAME *

Enter Last Name

FIRST NAME *

Enter First Name

☐ LOCKED

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Create Users

Click on a role to highlight, then use the single arrow to assign the role to the user

Create Users

If you are assigning the Security Administrator role, use the double arrow to assign all privileges to the user

AVAILABLE PRIVILEGES

- Acknowledge exception: Client Signature Exception
- Acknowledge exception: GPS Distance Exception
- Acknowledge exception: Service Verification Exception
- Acknowledge exception: Unmatched Client ID / Phone
- Acknowledge exception: Visit Verification Exception
- Client Maintenance - Access Module
- Client Maintenance - Add/Update Client
- Client Maintenance - Add/Update Client Payor Informa
- Client Maintenance - Delete Client
- Client Maintenance - Request MVV Device
- Client Maintenance - Update Client Name
- Client Maintenance - Update Medicaid ID

ASSIGNED PRIVILEGES

All other roles can skip this section

Create Users

The supervisor field is not used – click Create User at the bottom of the screen

Create Users

The user was successfully created, and an email has been sent to the user with login instructions for Sandata EVV
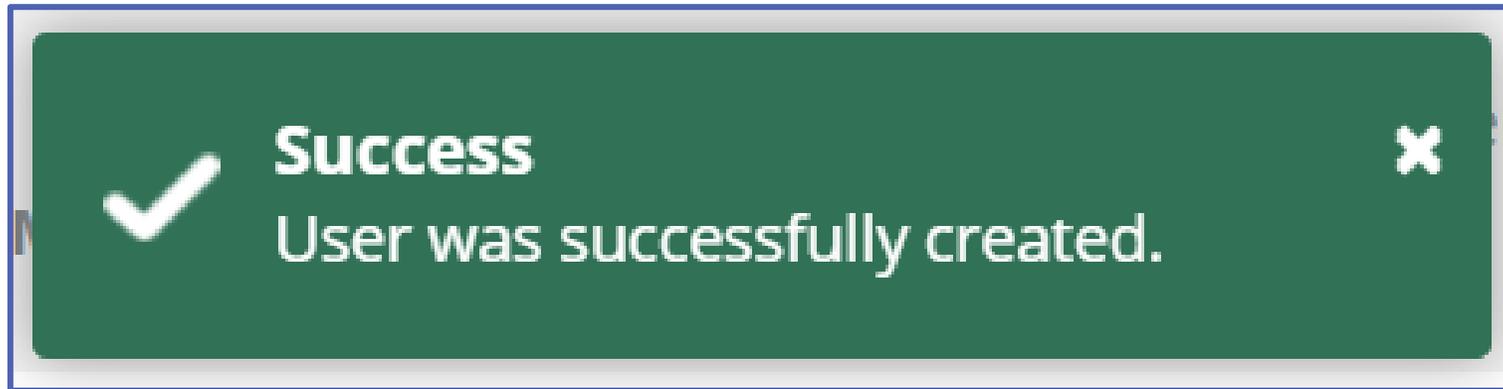
Create Employees – For Agency Providers Only

Create Employees

The employee record must be completed by a user, for the direct care giver to be able to:

- Sign into the Sandata Mobile Connect application

- Identify themselves during a Telephony call

- Be added to a manual visit in Sandata EVV

Create Employees

Login to Sandata EVV, then click Data Entry > Employees
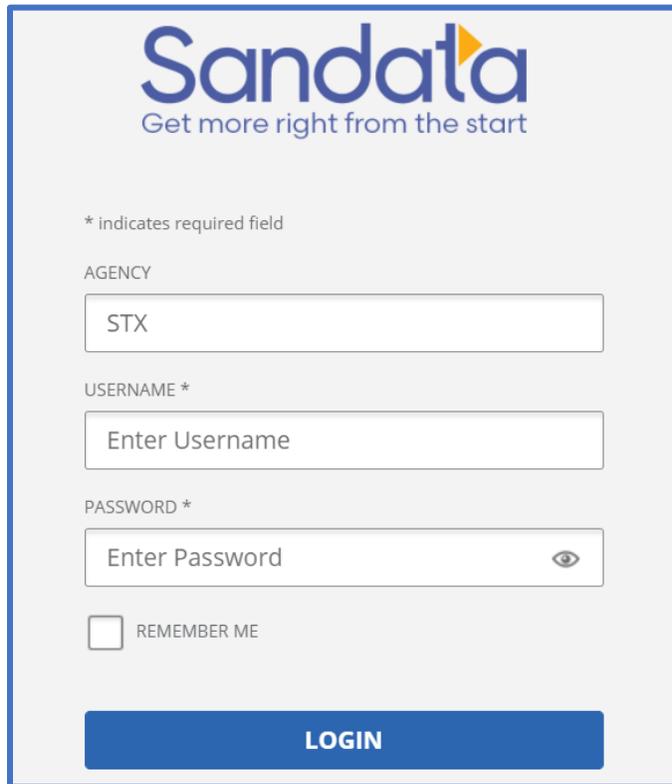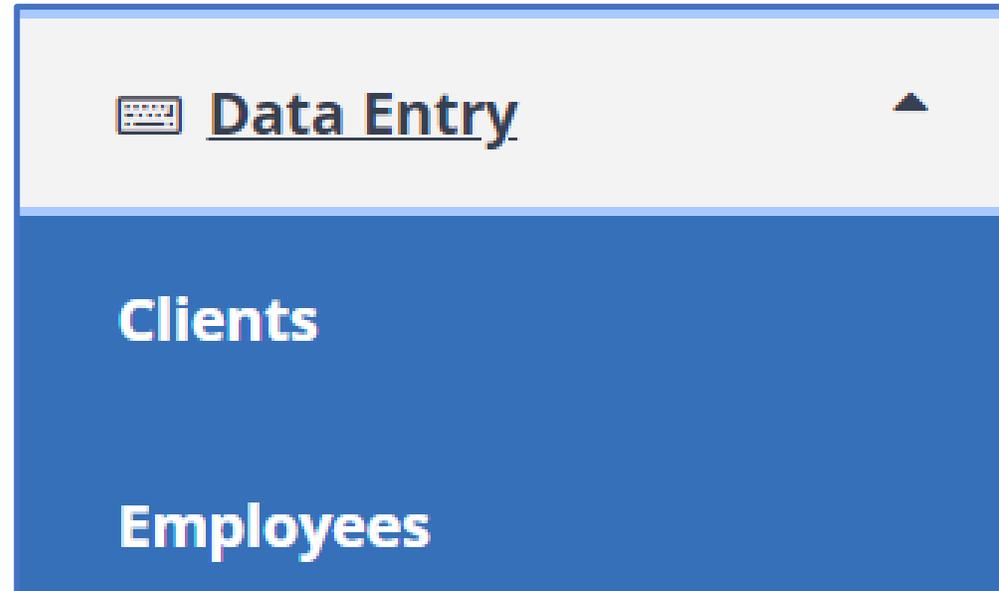
Create Employees

Click **Create Employee** in the upper right-hand corner of the screen

Create Employees

In the **Basic** section, complete all fields that are marked as required

If a field does not have an asterisk (*), it is not necessary to complete and can be left blank

Basic

* indicates required field

FIRST NAME *

Enter First Name

LAST NAME *

Enter Last Name

MIDDLE INITIAL

Enter M

EMPLOYEE ID

Enter Employee ID

EMPLOYEE OTHER ID

Enter Employee Other ID

SOCIAL SECURITY # * 000-00-0000

Enter Social Security #

SANTRAX ID

Enter Santrax ID

EMAIL ADDRESS * NOT CASE SENSITIVE

Enter Email Address

CONFIRMATION EMAIL ADDRESS * NOT CASE SENSITIVE

Enter Confirmation Email Address

Create Employees

In the Employment section, check the **Mobile User** box for the employee to record a visit with SMC

- If this box is not checked, the employee cannot use the Sandata Mobile Connect, because the application will not recognize/link the email address
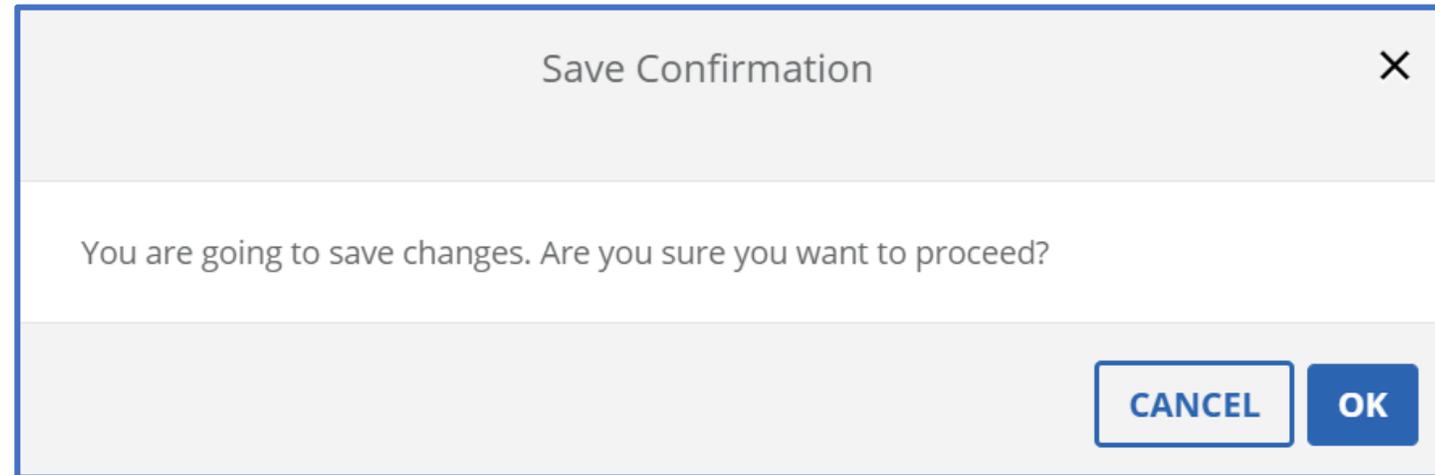
Create Employees

Click **Save**, then on the confirmation screen, click **OK**

SAVE CANCEL

Save Confirmation ✕

You are going to save changes. Are you sure you want to proceed?

CANCEL OK

Create Clients – For Agency and Non-Agency
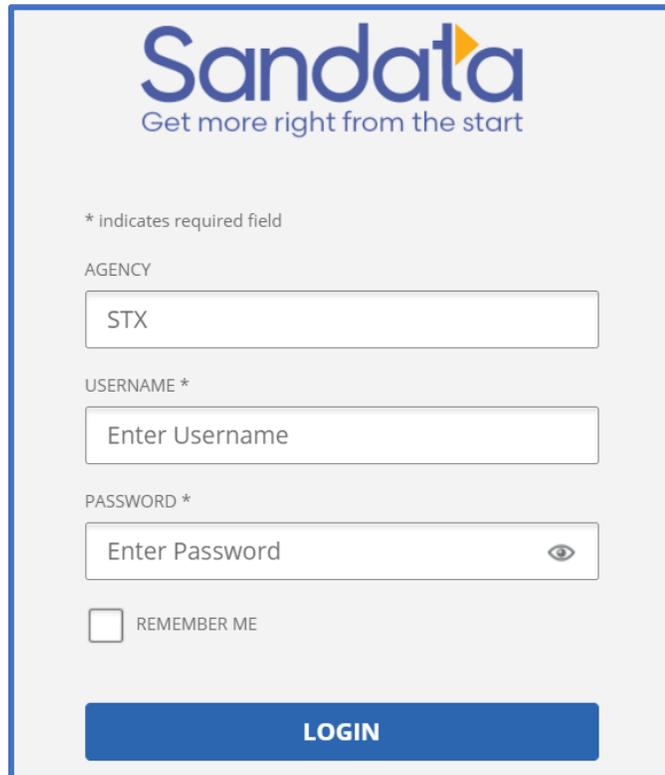
Create Clients

The client record must be completed first, before the individual can be:

- Searched when visits are recorded in the SMC application

- Identified during a Telephony call

- Added to a manual visit in Sandata EVV

Create Clients

Login to Sandata EVV, then click Data Entry > Clients
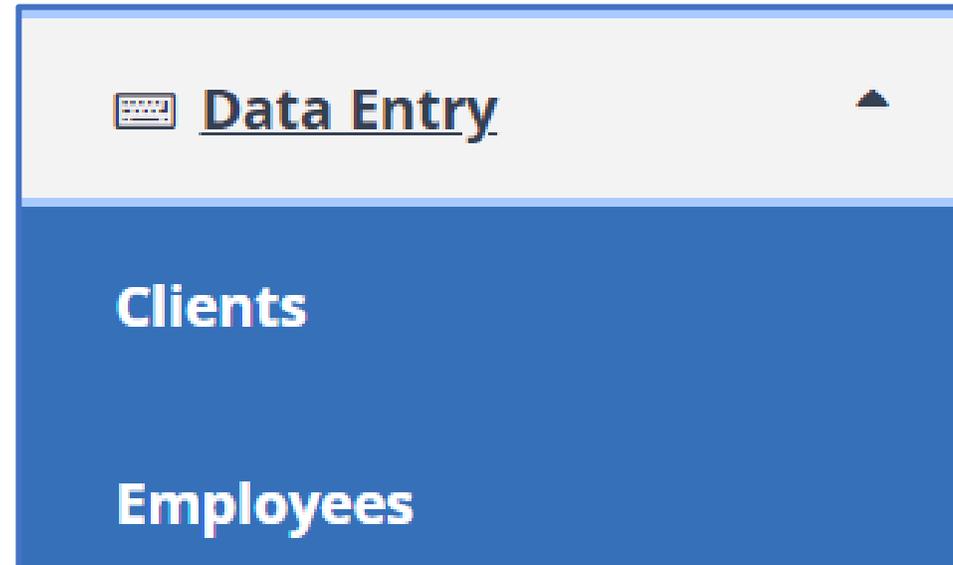
Create Clients

Click **Create Client** in the upper right-hand corner of the screen

Create Clients

In the Basic section, complete all fields that are marked as required

If a field does not have an asterisk (*), it is not necessary to complete and can be left blank

Create Clients

In the Client Payer section, click **Add New**

Client Payer

Add New   History

No Data Found!

Create Clients

Select the payer, program, and service for the client, select the start date, click **ADD**, then click the (x) to close out the payer popup

- Click here for a full list of EVV services
- If the Medicaid ID is pending and the individual has a PIMS ID, enter the PIMS ID in the Client Payer ID field – click here for video instructions

Create Clients

Note: each unique payer, program, and service combination must be added to the client record (for example, if a client receives LPN and RN services)

Create Clients

Use the Add New button, or use the copy icon to copy the current details

- The copy function can be helpful if only the services are different

Create Clients

Add the client's primary address(es), where services are typically provided

- To enter more than one address, click **View/Add Additional Addresses** and select the appropriate address type

Create Clients

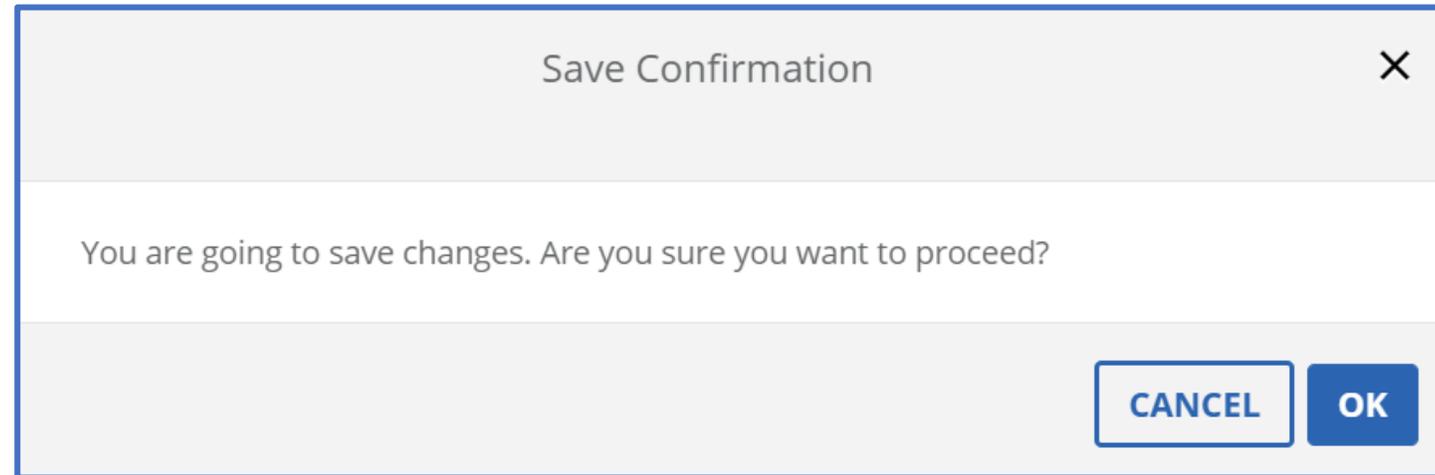Click **Save**, then on the confirmation screen, click **OK**

SAVE   CANCEL

Save Confirmation ✕

You are going to save changes. Are you sure you want to proceed?

CANCEL   OK

Now you are ready to log your visits!

When logging a visit with Sandata Mobile Connect, you will need:

- Your Company ID (2- XXXXX)
- Your username/email address
- Your password
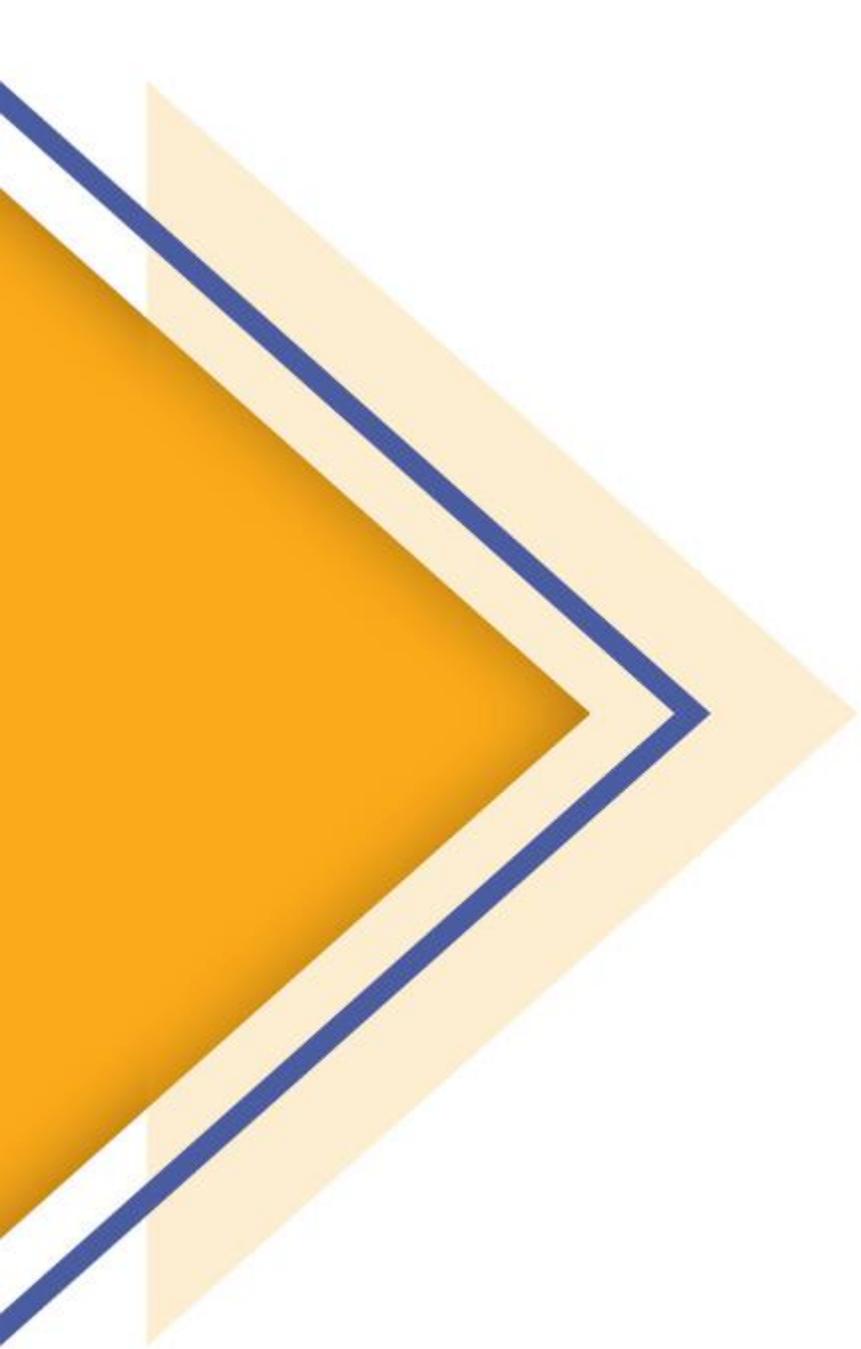- The Client ID or Client Medicaid ID

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Now you are ready to log your visits!

When logging a visit with Telephony, you will need:
- The phone number from your Call Reference Guide
- Your employee Santrax ID
- The Client ID or Client Medicaid ID
- The service ID, for the call out process

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Resources

Resources

Agency Provider Resources
- Agency EVV Training Manual
  https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Agency-Guide.pdf
- Agency EVV Video Library
  https://fast.wistia.net/embed/channel/vkywg2l6bp

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505, or email ODMCustomerCareEmail@sandata.com

Resources

Non-Agency Provider Resources
- Non-Agency EVV Training Manual
  https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Non-Agency-Guide.pdf
- Non-Agency EVV Video Library
  https://fast.wistia.net/embed/channel/qkz324kz0p

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505, or email ODMCustomerCareEmail@sandata.com
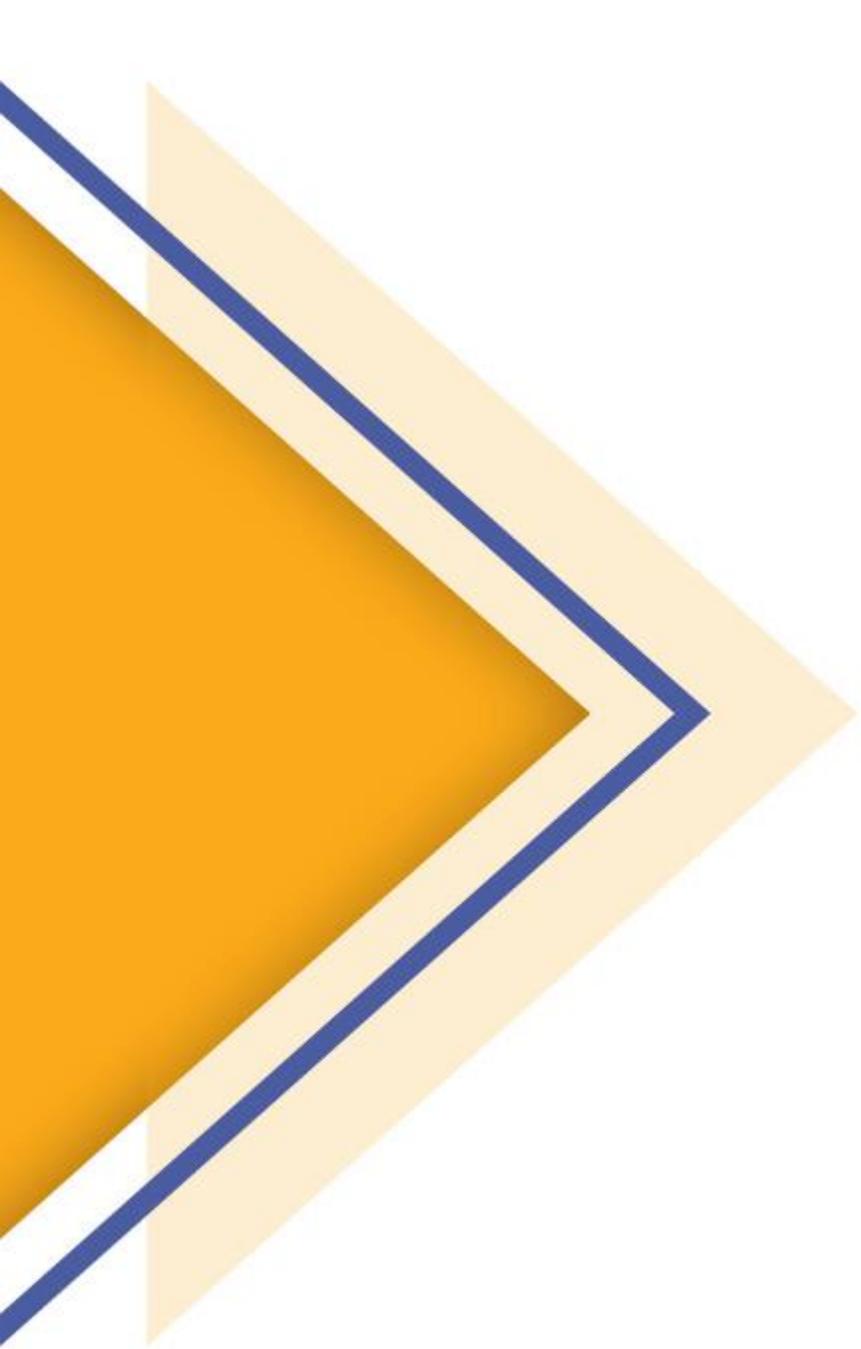
Resources

Provider 1-1 Session with Sandata Trainer

- https://go.oncehub.com/ODMEVVHelp

Questions

Reach Out with Questions

EVV Provider Hotline:

For help with a device or the EVV Portal, call 855-805-3505 or email ODMCustomerCareEmail@sandata.com

Hours of Operation:
- ▶ Mon-Fri, 7am-8pm
- ▶ Sat-Sun, 9am-5pm

ODM EVV Team:

For general EVV questions, email ODMEVV@Sandata.com or leave a voicemail at 614-705-1082

ODM Provider Assistance Hotline:

For help with changing contact information in MITS or claims questions call 800-686-1516