

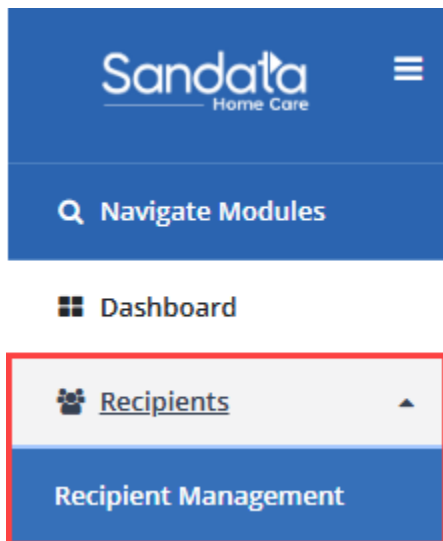
Adding Clients to Provider EVV Account

To get started, log into the EVV portal with your OH|ID at

<https://sandata.zendesk.com/hc/en-us/sections/8009092910867-Ohio-OH-ODM>

Once logged in, follow the steps below to add clients (recipients), services, and authorizations. Added clients must be activated in a separate step listed below.

1. Select **Recipients**, then select **Recipient Management**.



2. Select **Create Recipient**.



3. A popup appears. Complete all required fields, then select **Search**.

Notable Exceptions:

- If the ODA Only / No Medicaid ID switch is turned on, no Recipient will be found when you select "Search", so do not select this option.

After the Recipient's Medicaid ID number has been assigned, the Medicaid ID number must be added to the Recipient's Record. Open the Program tab and add the Medicaid ID under the Payer Details. Visits will remain in an incomplete status until the Recipient's profile has been updated with their Medicaid ID number.

The image shows a 'New Recipient' form with the following fields and controls:

- *Required** (red text)
- ODA Only / No Medicaid ID** (toggle switch, currently turned on, highlighted with a red box)
- Newborn** (toggle switch, currently turned off)
- Last Name*** (text input field)
- First Name*** (text input field)
- Date Of Birth*** (date picker input field)
- Program*** (dropdown menu with 'Select Program' text)
- Medicaid ID** (text input field)
- SEARCH** (blue button, highlighted with a red box)
- Client Payer ID*** (text input field)
- SSN** (text input field with format: ___-__-____)
- Phone** (text input field with format: () ___-____)
- CANCEL** (blue button)
- CREATE RECIPIENT** (blue button)

Program = DD

Client Payer ID, SSN, and phone can be left blank.

4. If a matching Recipient is found, the screen will refresh and include Recipient details. Select **Create Recipient**.



5. The Recipient record loads in a **Pending** status. There are required fields in the **Personal** and **Program** tabs. All required fields will have an asterisk (*).

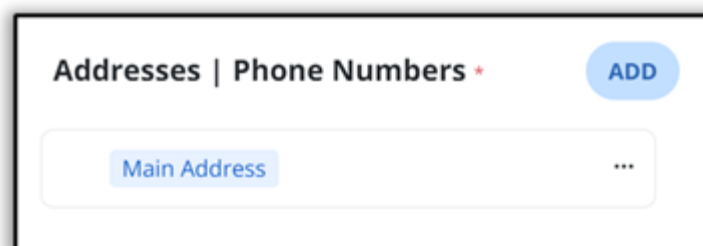


< BACK **Thomas, James** SP- State Plan | **Pending** HISTORY NOTES

Recipient ID: 921248 | Medicaid ID: 123123456456 | Main Address: -- | Phone No: -- | Main Emergency Contact: --

Personal* Program* Schedules

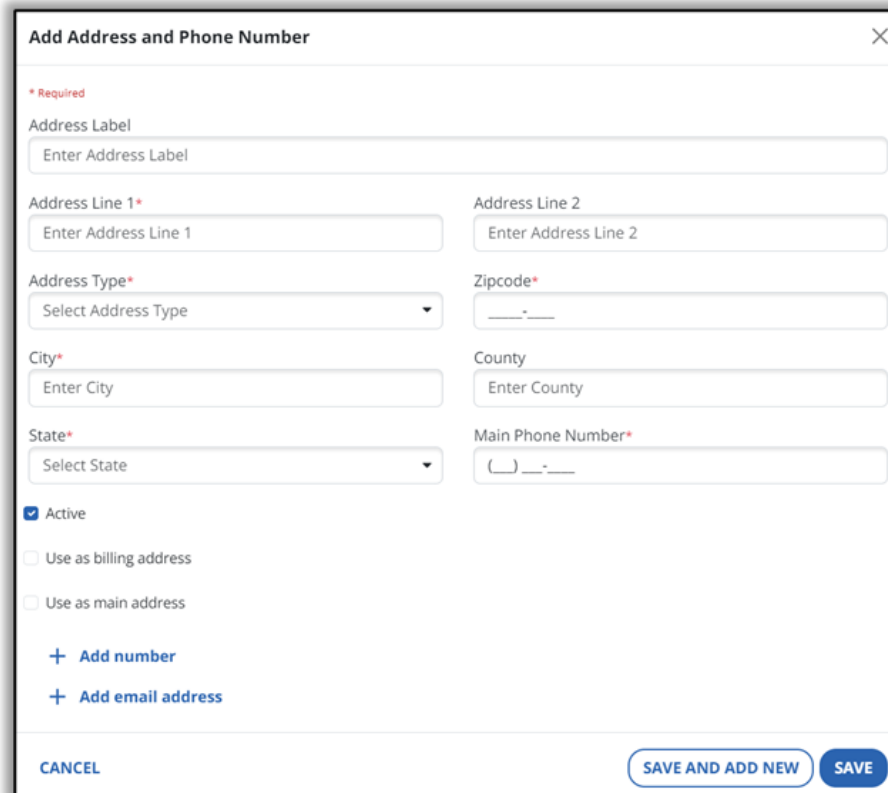
6. In the Personal tab, scroll down to the **Addresses | Phone Numbers** tile, and select **Add**.



Addresses | Phone Numbers * ADD

Main Address ...

7. Complete all required fields, then select **Save**.



The form is titled "Add Address and Phone Number" and includes a close button (X) in the top right corner. It contains several input fields and checkboxes. The "Address Label" field is required. "Address Line 1" and "Address Line 2" are also required. "Address Type" is a dropdown menu. "Zipcode" is a text field with a hyphen. "City" and "County" are text fields. "State" is a dropdown menu. "Main Phone Number" is a text field with a country code dropdown. There are three checkboxes: "Active" (checked), "Use as billing address", and "Use as main address". At the bottom, there are two buttons: "Add number" and "Add email address". At the very bottom, there are three buttons: "CANCEL", "SAVE AND ADD NEW", and "SAVE".

* Required

Address Label
Enter Address Label

Address Line 1*
Enter Address Line 1

Address Line 2
Enter Address Line 2

Address Type*
Select Address Type

Zipcode*
____-

City*
Enter City

County
Enter County

State*
Select State

Main Phone Number*
() -

☒ Active

☐ Use as billing address

☐ Use as main address

+ Add number

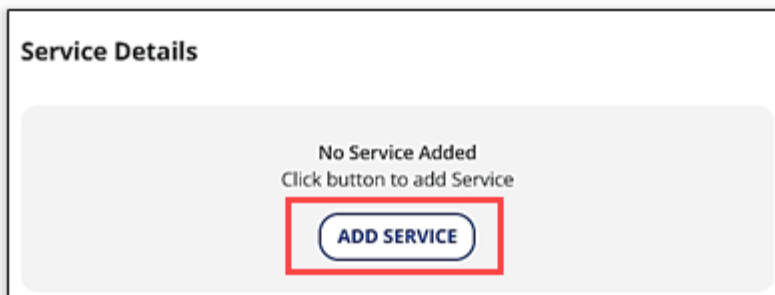
+ Add email address

CANCEL

SAVE AND ADD NEW

SAVE

8. In the Program tab, select **Add Service**.



The form is titled "Service Details". It contains a message: "No Service Added" and "Click button to add Service". Below this message is a button labeled "ADD SERVICE". The button is highlighted with a red rectangle.

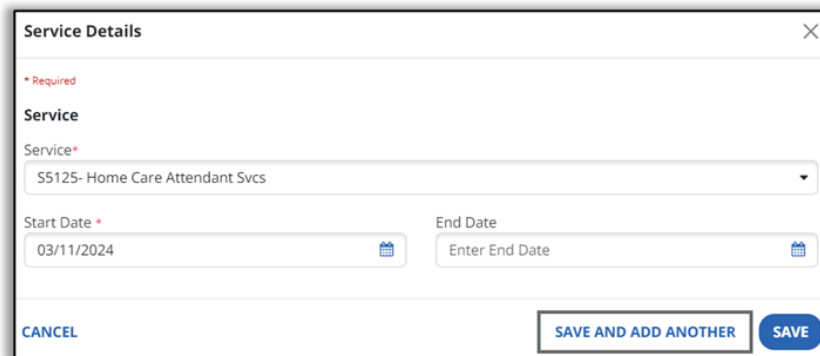
Service Details

No Service Added
Click button to add Service

ADD SERVICE

DD Services will be either HPC or Residential Respite (whichever service you are providing).

9. Complete all required fields, then select **Save**.



The 'Service Details' form is a modal window with a close button (X) in the top right corner. It contains a red asterisk and the word 'Required' at the top. Below this is the 'Service' section with a dropdown menu showing 'S5125- Home Care Attendant Svcs'. The 'Start Date' field is populated with '03/11/2024' and has a calendar icon. The 'End Date' field is empty with the placeholder text 'Enter End Date' and a calendar icon. At the bottom, there are three buttons: 'CANCEL', 'SAVE AND ADD ANOTHER', and 'SAVE'.

Service Details

* Required

Service

Service*

S5125- Home Care Attendant Svcs

Start Date *

03/11/2024

End Date

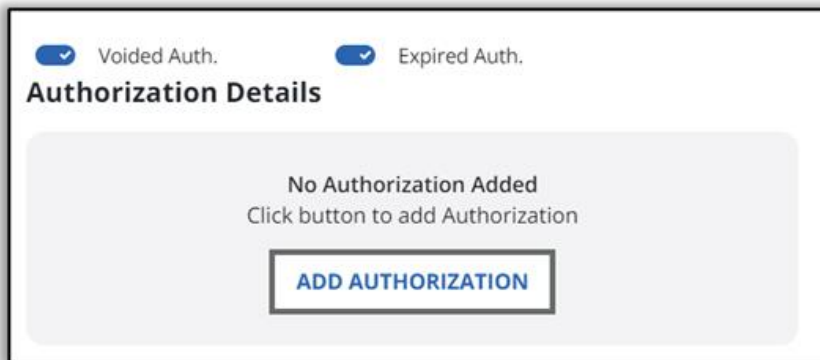
Enter End Date

CANCEL

SAVE AND ADD ANOTHER

SAVE

10. Select **Add Authorization**.



The 'Authorization Details' form is a modal window. At the top, there are two toggle switches, both of which are turned on: 'Voided Auth.' and 'Expired Auth.'. Below the toggles is the title 'Authorization Details'. The main content area has a light gray background and contains the text 'No Authorization Added' and 'Click button to add Authorization'. At the bottom, there is a button labeled 'ADD AUTHORIZATION'.

☒ Voided Auth. ☒ Expired Auth.

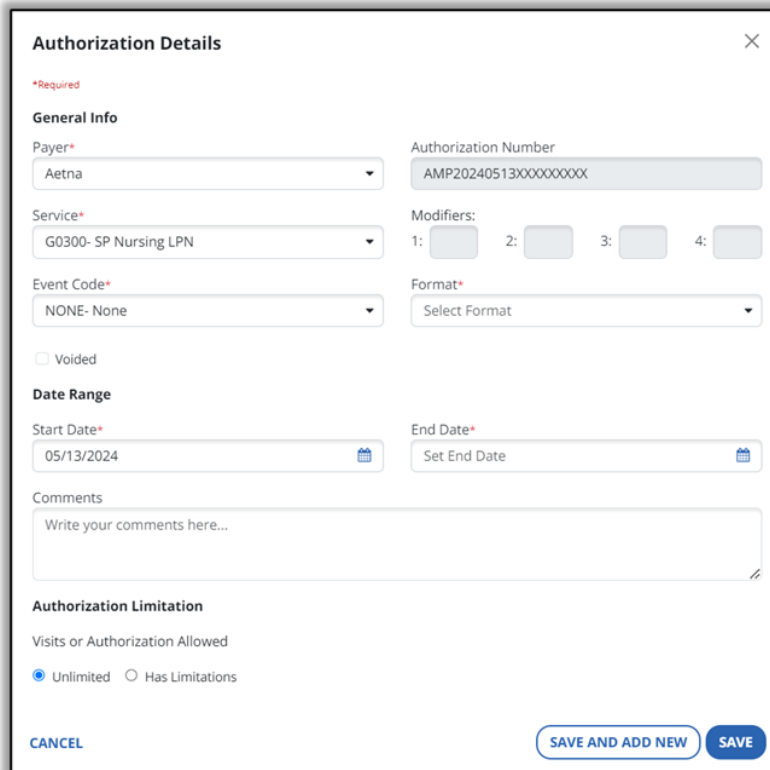
Authorization Details

No Authorization Added

Click button to add Authorization

ADD AUTHORIZATION

11. Complete all required fields, then select **Save**.

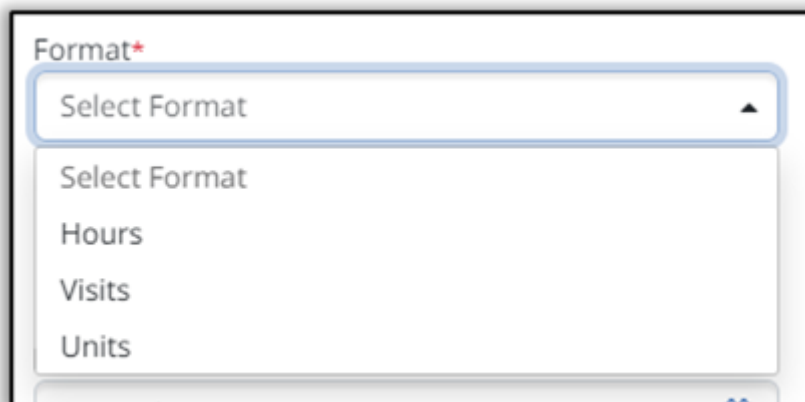


The image shows a form titled "Authorization Details" with a close button (X) in the top right corner. The form is divided into several sections:

- *Required** (indicated by a red asterisk)
- General Info**
 - Payer***: A dropdown menu with "Aetna" selected.
 - Authorization Number**: A text field containing "AMP20240513XXXXXXXX".
 - Service***: A dropdown menu with "G0300- SP Nursing LPN" selected.
 - Modifiers:**: Four input fields labeled 1, 2, 3, and 4, all currently empty.
 - Event Code***: A dropdown menu with "NONE- None" selected.
 - Format***: A dropdown menu with "Select Format" selected.
 - ☐ **Voided**
- Date Range**
 - Start Date***: A date picker showing "05/13/2024".
 - End Date***: A date picker showing "Set End Date".
- Comments**: A text area with the placeholder "Write your comments here..." and a small icon in the bottom right corner.
- Authorization Limitation**
 - Visits or Authorization Allowed**: Two radio buttons, "Unlimited" (selected) and "Has Limitations".

At the bottom of the form, there are three buttons: "CANCEL", "SAVE AND ADD NEW", and "SAVE".

a. The **Format** selection must match the selection made when creating a schedule for the Recipient. For example, if units are selected in the authorization, the schedule must be created in units.



The image shows a close-up of the "Format*" dropdown menu. The menu is open, displaying the following options:

- Select Format (highlighted)
- Select Format
- Hours
- Visits
- Units

b. **Authorization Limitations** can be added to restrict the amount of time recorded within a specific range of days, weeks, months, or years.

Authorization Limitation

Visits or Authorization Allowed

☐ Unlimited ☒ Has Limitations

Total Limitation*

0

0.00 Total Used 0.00 Total Missed 0.00 Total Remaining

Limitation

Limit By

None

Select Limit By

None

Day

Week

Month

Year

SAVE AND ADD NEW SAVE

12. Select the status drop-down in the upper right corner of the screen, then select **Active**.

Pending

Pending

Active

On Hold

Discharged

Cancelled

13. Download the *Sandata Mobile Connect* app on your phone. Disable GPS tracking for the app in your phone settings unless you have written consent from the individual to use GPS.
14. Use the EVV *Sandata Mobile Connect* app to capture visits when providing services.
15. Monitor weekly provider billing reports in eMBS for EVV errors.