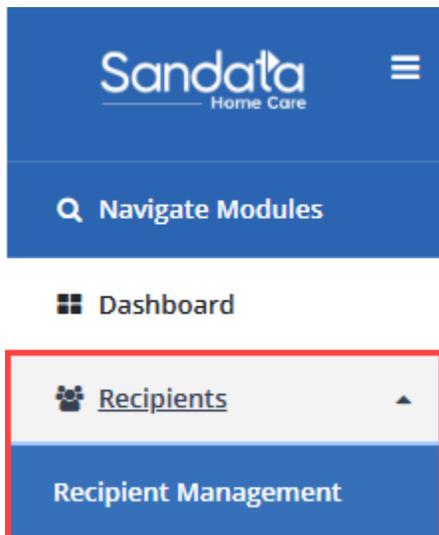


Adding Clients to Provider EVV Account

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) and **SEARCH** button (highlighted with a red box)
- Client Payer ID*** (text input field)
- SSN** (text input field with dashes)
- Phone** (text input field with parentheses and dashes)
- CANCEL** (text link)
- CREATE RECIPIENT** (blue button)

Program = DD

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

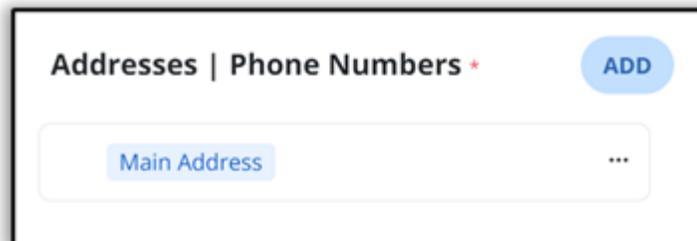
4. If a matching Recipient is found, the screen will refresh and include Recipient details. Select **Create Recipient**.



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 (*).



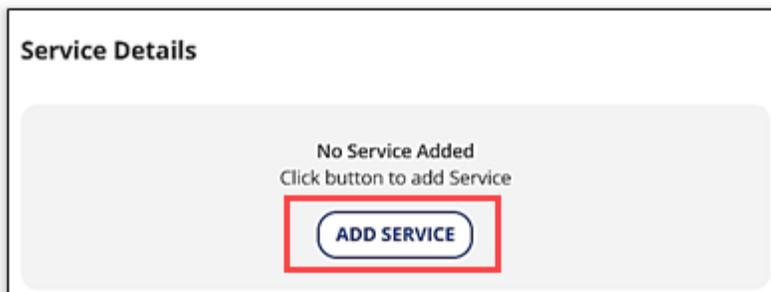
6. In the Personal tab, scroll down to the **Addresses | Phone Numbers** tile, and select **Add**.



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

The screenshot shows a form titled "Add Address and Phone Number" with a close button (X) in the top right corner. The form contains several input fields and checkboxes. The "Required" fields are marked with a red asterisk. The fields include: "Address Label" (text input), "Address Line 1*" (text input), "Address Line 2" (text input), "Address Type*" (dropdown menu), "Zipcode*" (text input), "City*" (text input), "County" (text input), "State*" (dropdown menu), and "Main Phone Number*" (text input). There are also three checkboxes: "Active" (checked), "Use as billing address", and "Use as main address". At the bottom, there are two buttons: "CANCEL" and "SAVE AND ADD NEW" (with a "SAVE" button next to it). There are also two links: "+ Add number" and "+ Add email address".

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



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

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

Service Details [Close]

* Required

Service

Service*
S5125- Home Care Attendant Svcs

Start Date* 03/11/2024 [Calendar]

End Date Enter End Date [Calendar]

CANCEL SAVE AND ADD ANOTHER SAVE

10. Select **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**.

Authorization Details [Close]

**Required*

General Info

Payer* [Aetna] Authorization Number [AMP20240513XXXXXXXX]

Service* [G0300- SP Nursing LPN] Modifiers: 1: [] 2: [] 3: [] 4: []

Event Code* [NONE- None] Format* [Select Format]

Voided

Date Range

Start Date* [05/13/2024] End Date* [Set End Date]

Comments [Write your comments here...]

Authorization Limitation

Visits or Authorization Allowed

Unlimited Has Limitations

[CANCEL] [SAVE AND ADD NEW] [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.

Format*

Select Format

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.

The screenshot shows a form titled "Authorization Limitation". It includes a section for "Visits or Authorization Allowed" with radio buttons for "Unlimited" and "Has Limitations" (selected). Below this is a "Total Limitation*" input field with the value "0". To the right, a summary box displays "0.00 Total Used", "0.00 Total Missed", and "0.00 Total Remaining". A "Limitation" section features a "Limit By" dropdown menu currently set to "None", with a list of options: "None", "Day", "Week", "Month", and "Year". At the bottom right, there are two buttons: "SAVE AND ADD NEW" and "SAVE".

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

The screenshot shows a vertical dropdown menu with the following options: "Pending" (orange text), "Pending" (orange text), "Active" (green text, highlighted with a red border), "On Hold" (light blue text), "Discharged" (red text), and "Cancelled" (red text).

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.