

Making EVV Corrections in the EVV Sandata Portal

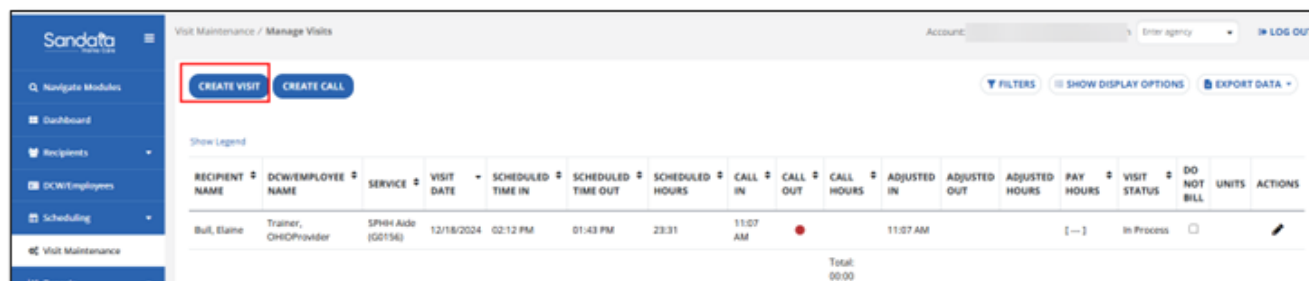
Sandata EVV Portal Login: <https://sandata.zendesk.com/hc/en-us/sections/8009092910867-Ohio-OH-ODM>

Creating a Visit

Use the **Create Visit** function when there are no calls or schedules for a visit that occurred. For example, if the DCW/Employee forgot to call in and out, you will create the visit using **Create Visit** in Visit Maintenance.

This feature is used to create visits that occurred and cannot be used to create visits in the future.

1. In the **Visit Maintenance** screen, select **Create Visit**.



2. Use filters to search for the recipient. In the search results, select the button for that recipient under **Actions**. Then select **Next**.

Find Recipient

CANCEL

10 of 232 entries

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5. Then, select the **Reason Code** and select **ADD**.

Adjusting Call Times and Dates

If a visit has missing or incorrect dates or call times, visit the **General** tab of the **Visit Details** screen to adjust the dates or times.

1. From the **Visit Maintenance** screen, select the Pencil  icon from the **ACTIONS** column. This will take you to the **Visit Details** screen.

RECIPIENT NAME	SCHWEMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
Frederick, Wilson	Smith, Morgan	MyCar - Enhanced Community Living (HCL)	12/19/2024	12:00 PM	01:00 PM	01:00											

2. On the **General** tab, enter the adjusted dates and times into the adjusted in and out fields.

The screenshot shows the 'General' tab of a software interface. It contains several input fields for scheduling a visit. The 'Adjusted In Date' and 'Adjusted Out Date' fields are highlighted with a red box. The 'Adjusted In Date' field contains '12/16/2024' and the 'Adjusted Out Date' field contains '12/16/2024'. Other fields include 'Schedule In', 'Schedule Out', 'Schedule Hours', 'Visit From Date', 'Visit To Date', 'Visit Time Zone', 'Visit Status', 'Call In', 'Call Out', 'Call Hours', 'Units', 'Agency ID', 'Agency Name', 'Payer', 'Program', 'Service', 'Group Visit Code', 'Recipient Verified Time', 'Recipient Verified Service', 'Recipient Signature', 'Visit Source', 'Schedule ID', 'Do Not Bill', and 'Approved'. A 'GENERATE GROUP VISIT CODE' button is located at the bottom right.

3. As for any exception update, select the **REASON CODE** and enter a **REASON NOTE**, if it applies.


Use the **REASON NOTE** field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.

The screenshot shows the 'Reason Code' and 'Reason Note' fields. The 'Reason Code' field is highlighted with a red box and contains the value '99 Documentation on file supports manual c...'. The 'Reason Note' field contains the text 'Enter Reason Note'. A 'SAVE' button is located to the right of the fields. A red asterisk indicates a required field.

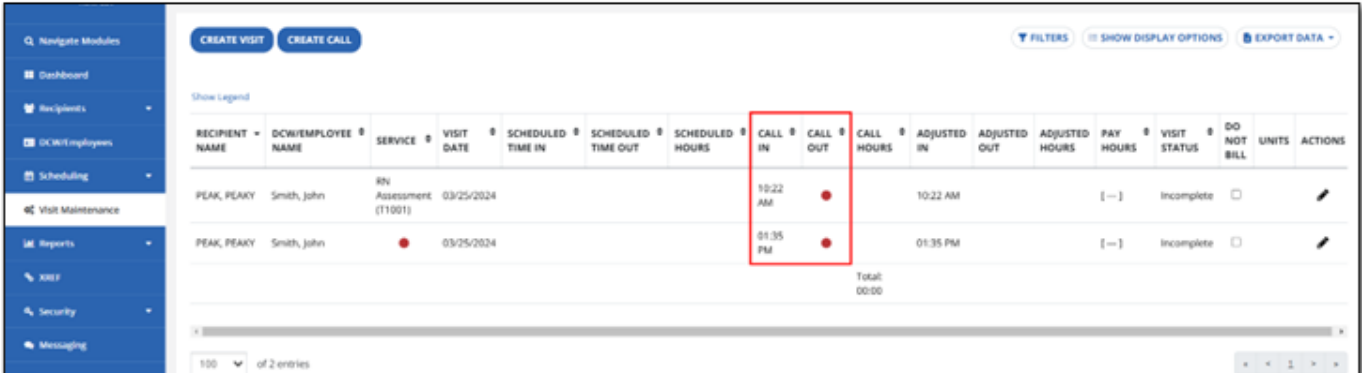
4. Select **SAVE**. You will now be able to see the adjusted date(s) and time(s) for the visit.






The screenshot shows the 'Reason Code' and 'Reason Note' fields. The 'Reason Code' field contains the value '99 Documentation on file supports manual c...'. The 'Reason Note' field contains the text 'Enter Reason Note'. A 'SAVE' button is highlighted with a red box. A red asterisk indicates a required field.

Adding a Manual Call to an Existing Visit

If a visit has missing or incorrect dates or call in/out times, using the **Visit Maintenance** screen, select the in or out call red  button. To save a visit that has been changed, users may be required to enter a **Reason Code** and **Resolution Code**.

1. The Red dot in the call in or call out column shows a missing call exception. This can be in either one column or in both Call In and Call Out columns.



RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
PEAK, PEAKY	Smith, John	RN Assessment (T1001)	03/25/2024				10:22 AM			10:22 AM			[--]	Incomplete	<input type="checkbox"/>		
PEAK, PEAKY	Smith, John		03/25/2024				01:35 PM			01:35 PM			[--]	Incomplete	<input type="checkbox"/>		
Total:										00:00							

2. Select a red dot to go to the Visit Details **Call Log** tab.

3. Fill in the required fields for in the in or out call.

Call Log Information Section

Call In							
Call Date	03/25/2024	Call Time	10:22 AM	Call Type	MVV (Mobile, GPS)	Service	RN Assessment (T1001)
User	johnsmith20837@yopmail.com	Latitude	40.03974481147803	Longitude	-83.15266482253386	Call Source	OH Generic
Time Zone	America/New_York	Location	Home				

Add Manual Call

* indicates required field

Call Date MM/DD/YYYY *
03/25/2024

Call Time HH:MM AM/PM *
11:22 AM

Service
RN Assessment (T1001)

Time Zone
America/New_York

Location *
Home

4. Select the Location and **Reason Code**. Use the **Reason Note** field to add additional information about the visit. Some **Reason Codes** require a **Reason Note**.

5. Select **Save**.

6. If both calls were missing, once the call in has been added and saved, you will receive additional prompts to Add a Manual Call. This will be your call out. The call in will appear at the top of the window.

Call Log Information Section

Call In							
Call Date	07/16/2024	Call Time	12:17 PM	Call Type	Manual Call	Service	MyCare - LPN (T1003)
User	TRAINER2025@YOPMAIL.COM	Call Source	OH Generic	Time Zone	US/Eastern	Location	Home

Add Manual Call

* indicates required field

Call Date MM/DD/YYYY *

07/16/2024

Call Time HH:MM AM/PM *

02:18 PM

Service *

MyCare - LPN (T1003)

Time Zone

US/Eastern

Location *

Home

* indicates required field

Reason Code *

99 Documentation on file supports manual e...

Reason Note

Enter Reason Note

SAVE

Visit Maintenance / Visit Details

Success
Visit is successfully updated.

Account: [dropdown] Enter agency [dropdown]

[BACK](#) Visit From Date: 07/16/2024

Recipient ID: 560648 | Recipient Name: XL Mo | Medicaid ID: 123557897787 | DCW/Employee ID: 1234567891 | DCW/Employee Name: Test, Sant

General Recipient DCW/Employee **Call Log** Tasks Exceptions GPS Memo Claims History

Call Log Information Section

Call In							
Call Date	07/16/2024	Call Time	12:17 PM	Call Type	Manual Call	Service	MyCare - LPN (T1003)
User	TRAINER2025@YOPMAIL.COM	Call Source	OH Generic	Time Zone	US/Eastern	Location	Home
Call Out							
Call Date	07/16/2024	Call Time	01:23 PM	Call Type	Manual Call	Service	MyCare - LPN (T1003)
User	TRAINER2025@YOPMAIL.COM	Call Source	OH Generic	Time Zone	US/Eastern	Location	Home

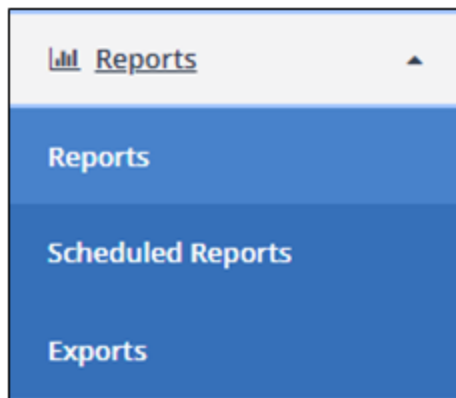
Calls manually added will display in the **Visit Maintenance** as Adjusted In or Out.

Provider Identification (ID) Does Not Match

The error message “Provider ID Does Not Match” means the Medicaid ID on your claim is not in the Sandata Electronic Visit Verification (EVV) system or the Sandata Aggregator. First, identify what Medicaid ID is associated with the account you are using to record visits. Then, compare this value to the Medicaid ID associated with the claim.

Identifying the Medicaid ID

1. Select **Reports**.



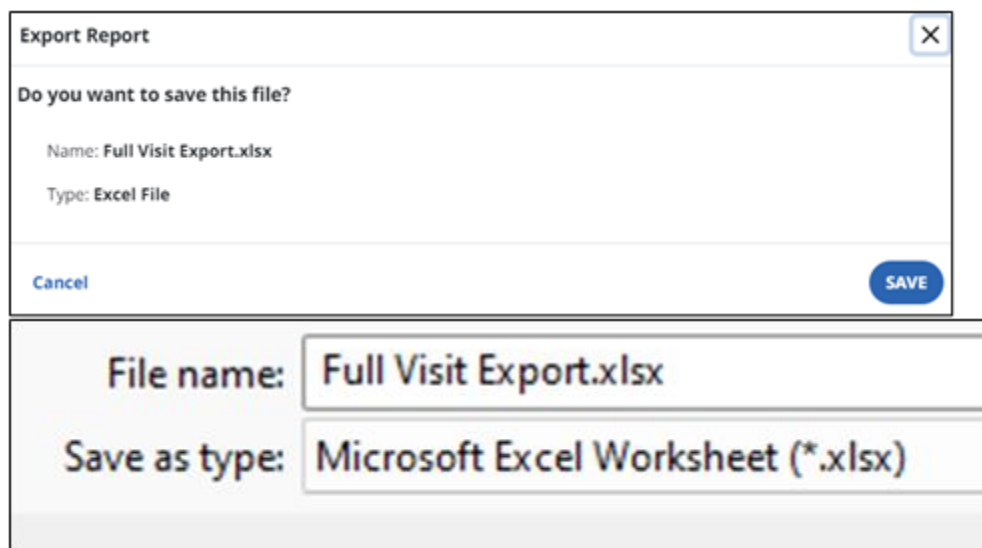
2. Scroll down to **Date Range Reports**, then select **Full Visit Export**.

Date Range Reports
Auto Verification Report Detail
Auto Verification Report Summary
Recipient Visit Summary
Daily / Weekly Hours Worked - Detail
Daily / Weekly Hours Worked - Summary
Daily Units
Detail Visit Status
EVV Compliance
DCW/Employee Activity
DCW/Employee Visit Log
Expanded Visit Sum (Cli)
Expanded Visit Sum (Emp)
Full Visit Export

3. When the filters appear, select **Run Export**. You do not need to adjust any filters.

CLEAR	RUN EXPORT	SCHEDULE REPORT
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4. Select **Save** and download the report.



The image shows two overlapping dialog boxes. The top dialog box is titled "Export Report" and contains the text "Do you want to save this file?". Below this text, it displays "Name: Full Visit Export.xlsx" and "Type: Excel File". At the bottom left is a "Cancel" button, and at the bottom right is a blue "SAVE" button. The bottom dialog box is a "Save As" file name dialog. It has a "File name:" label followed by a text box containing "Full Visit Export.xlsx". Below that, it has a "Save as type:" label followed by a dropdown menu showing "Microsoft Excel Worksheet (*.xlsx)".

5. When the report opens, scroll all the way to the right. The **Provider ID** column will display the Provider Medicaid ID number that is associated with your EVV account.

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Next Steps

- I see the Medicaid ID in EVV, but I do not know the Medicaid ID I used for my billing.
 - The Medicaid ID used for billing can be found on the claim. Please work with your biller, billing team, or third-party biller to identify which provider Medicaid ID was used on the submitted claim.
- The Medicaid ID in EVV is one that I am no longer using.
 - Work with your payer or ODM to have the Medicaid ID on your contract updated, then register in the [Sandata Provider Registration Portal](#) with the correct Medicaid ID.
- The Medicaid ID in EVV is for a different location within my organization.
 - Register in the [Sandata Provider Registration Portal](#) with the Medicaid ID for your location. Once an account is created, record the visits for each location in the appropriate EVV account.
- I do not have a Sandata account or an Aggregator account.
 - Use the [EVV Getting Started Workflow](#) as a guide to creating and maintaining your EVV account.

If you have further questions or concerns regarding this process, call the Integrated Help Desk at 800-686-1516.