



Electronic Visit Verification

Frequently Asked Questions

Table of Contents

SECTION 1	INTRODUCTION	3
SECTION 2	GETTING STARTED	4
2.1	How to Enroll in EVV	4
2.2	How to Start Using Sandata EVV	5
SECTION 3	VISIT MAINTENANCE AND CORRECTING EXCEPTIONS	6
3.1	How to Manually Enter Visits	6
3.2	How to Fix Red Dot Exceptions	6
3.3	How to Fix Yellow Dot Exceptions:.....	8
SECTION 4	FREQUENTLY ASKED QUESTIONS	9
SECTION 5	APPENDIX A – AGENCIES AND SERVICES.....	10

Section 1 Introduction

The following is a guide when interacting with Sandata for Electronic Visit Verification (EVV). Refer to this document for frequently asked questions and resources.

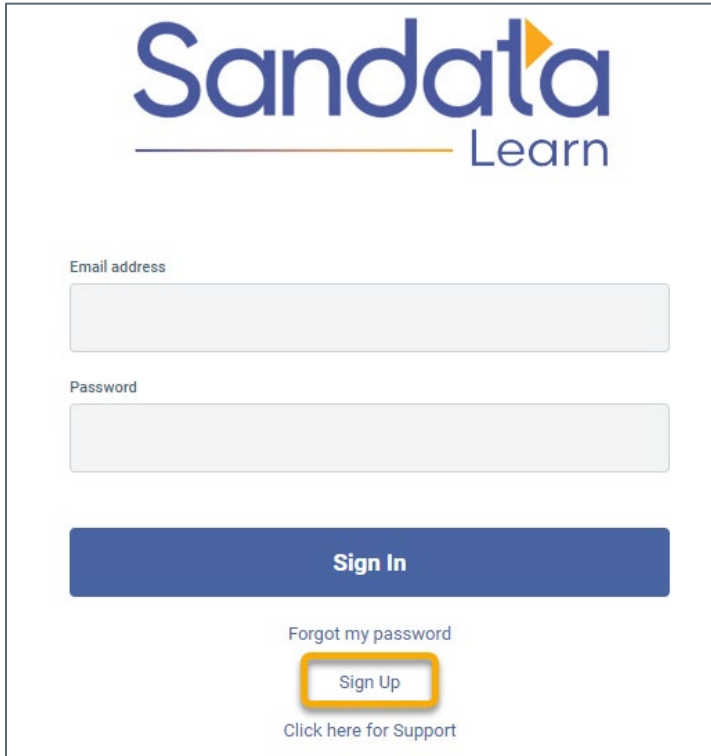
Additional information about Vermont EVV can be found at [Electronic Visit Verification \(EVV\) | Department of Vermont Health Access](#).

For additional questions, please contact your agency administrator.

Section 2 Getting Started

2.1 How to Enroll in EVV

To enroll with DHS free Sandata solution, go to [Sandata Learn](#) and select **Sign Up**, below the Sign In button. Enter the required information within the form then click Sign Up.

The image shows a screenshot of the Sandata Learn sign-up form. At the top is the Sandata Learn logo. Below the logo are two input fields: "Email address" and "Password". Below these fields is a blue "Sign In" button. Underneath the "Sign In" button is a link that says "Forgot my password". Below that is a "Sign Up" button, which is highlighted with a yellow border. At the bottom of the form is a link that says "Click here for Support".

Continue to fill out the form in its entirety, then click Submit.

On the Dashboard Landing page, complete the following courses under Learning Experiences:

- Mastering Your Learning Journey
- Sandata EVV Administrator Training

Once complete, a Welcome Kit will arrive within 48-72 business hours, to the e-mail registered with the Sandata Learn portal.

Your Welcome Kit will provide you with multiple resource links. Locate the link to obtain your Welcome Kit contents and store them to a safe location for easy access as the Welcome kit link expires 10 calendar days, post-delivery.

2.2 How to Start Using Sandata EVV

After you receive your Welcome Kit contents, log in using the credentials supplied in your Welcome Letter.

- Enter – STX12345
- Username: EMAIL ADDRESS
- Password: TEMPORARY PASSWORD

Once logged in, go through the following steps:

1. When you first log in, you will land on the **Security Module**. Move ALL roles AND privileges from the left side of your window to the right side using the double arrows in between the tables. Save and close.
2. Add another **Security User** to the system, as a precautionary measure, in the event you are locked out of the system.
3. Go to the **Client Module**. Click Search to populate a full list of your recipients in the Sandata EVV System. PCS providers will have state-fed clients loaded to their system in PENDING status. To change your client to ACTIVE status, click the pencil to edit the client, choose the program tab, click the drop-down arrow under Status, select Active, Save and Close.

* If you are missing a client, click Create Client in the upper right corner to add your client manually.

4. Click on the **Employee Module**. Here, you will manually enter your staff. Security Users can also be added here as office staff and/or caregiver.

Are your staff downloading the Sandata Mobile Connect app to log their visits?

If yes, you MUST add a valid e-mail address AND select the Mobile User checkbox at the bottom of the page.

Send this link to your caregivers to learn how to use the SMC v2.0 app and TVV:

SMC and TVV (Caregiver Library)

<https://sandata.zendesk.com/hc/en-us/sections/20725376761363-Caregiver-Library>

5. Navigate to **Visit Maintenance**. Visit Maintenance allows you to view visit entries to ensure they are in a Verified Status. When all visits show Verified, you are ready to bill.

You are encouraged to go to the following link to review how to use Visit Maintenance at its zenith:

Sandata EVV

<https://sandata.zendesk.com/hc/en-us/sections/360009365034-Sandata-EVV>

Section 3 Visit Maintenance and Correcting Exceptions

3.1 How to Manually Enter Visits

1. Navigate to the Visit Maintenance Module.
2. In the upper right corner of our Visit Maintenance window, choose CREATE VISIT.
3. Use the Search parameters or click SEARCH to view a full list of clients.
4. Click the radio button on the right side of the window to select your client, then click next.
5. Repeat the step above for the employee, click next.
6. Enter your Date, Call In/Out time, choose your location, service and then click ADD.
 - * If you are entering multiple visits, you can choose the option to SAVE & ADD ANOTHER to consecutively add your visit entries.
7. Once this is complete, confirm your visit data entered, is in Verified status. Once confirmed, you are ready to bill for services.

3.2 How to Fix Red Dot Exceptions

Red dot exceptions notate a missing piece of information that is required within the visit. This missing information must be filled out with a reason code.

Missing Client

1. Double click the Red Dot under the client column in the visit grid.
2. Verify you are in the CLIENT tab.
3. Click Search to view a full list of clients.
4. Click the radio button in the Actions column to choose your client.
5. Click the REASON CODE drop down and choose reason for the update.
6. Click drop down in RESOLUTION CODE and choose Written Documentation Maintained.
7. Click on REASON NOTE and enter reason for error.
8. Click Save.
9. Confirm the visit entry has moved to VERIFIED in the Visit Status column.

Employee Name

1. Double click the Red Dot under Employee name column in the visit grid.
2. Verify you are in the EMPLOYEE tab.
3. Click Search to view a full list of Employees.
4. Click the radio button in the Actions column to choose your client.
5. Click the REASON CODE drop down and choose the reason for the update.
6. Click drop down in RESOLUTION CODE and choose Written Documentation Maintained.
7. Click on REASON NOTE and enter reason for error.

8. Click Save.
9. Confirm the visit entry has moved to VERIFIED in the Visit Status column.

Missing Service Code/Incorrect Service Selected

1. Double click on Red Dot under Service Column in Visit grid.
2. Verify you are on the General Tab.
3. From the bottom row, count 3 rows up and over 3 columns to find Service dropdown.
4. Click the dropdown and choose the service for the Client.
5. Click the REASON CODE drop down and choose the reason for the update.
6. Click drop down in RESOLUTION CODE and choose Written Documentation Maintained.
7. Click on REASON NOTE and enter reason for error.
8. Click Save.
9. Confirm visit entry has moved to VERIFIED in the Visit Status column.

Call In/Out

1. Double click on the Red Dot under the Call In/Call Out column.
2. Verify you are on the Call Log.
3. Enter the Call Date, Time, Service, Location for the missing entry.
4. Click the REASON CODE drop down and choose the reason for the update.
5. Click drop down in RESOLUTION CODE and choose Written Documentation Maintained.
6. Click on REASON NOTE and enter reason for error.
7. Click Add.
8. Click the X in the upper right corner of the Visit Detail window.
9. Confirm the visit entry has moved to VERIFIED in the Visit Status Column.

Missing Location

1. Missing Location exceptions are Red Dot exceptions UNDER the Call IN/OUT times.
2. These exceptions cannot be acknowledged or fixed from the original entry.
3. Please click the Do Not Bill check box in the DO NOT BILL column of your Visit Grid.
4. Click the REASON CODE drop down and choose the reason for the update.
5. Click dropdown in RESOLUTION CODE and choose Written Documentation Maintained.
6. Click on REASON NOTE and enter reason for error.
7. Click Save.
8. Confirm the Visit moves to OMIT in the Visit Status column.
9. Manually re-create the visit entry.
10. In the upper right corner of your Visit Maintenance window, choose CREATE VISIT.

11. Use the Search parameters or click SEARCH to view a full list of clients. Click the radio button on the right side of the window to select your client, then click next.
12. Repeat the step above for the Employee. Click next.
13. Enter your Date, Call In/Out time, choose your location, service and then click ADD.
14. If you are entering multiple visits, you can choose the option to SAVE & ADD ANOTHER to consecutively add your visit entries.
15. Once this is complete, confirm your visit data entered is in Verified status. Once confirmed, you are ready to bill for services.

3.3 How to Fix Yellow Dot Exceptions:

Yellow dot exceptions notate a change needing to be made within the system. These exceptions must be acknowledged and have a reason code selected.

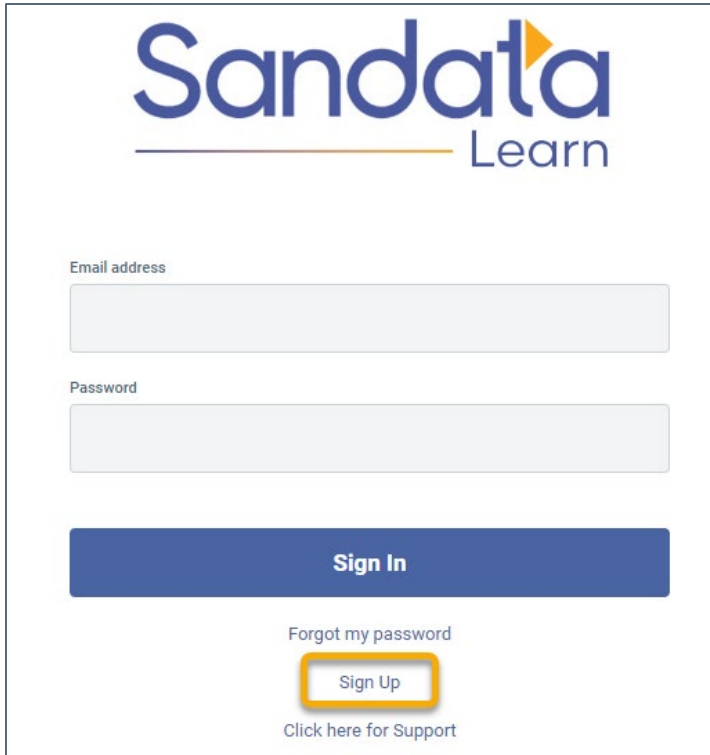
Mismatch Client ID/Phone

1. Double click on the entry showing a Yellow Dot Exception.
2. Click on Exceptions in the Visit Details window.
3. Click Acknowledge Exception.
4. Click the REASON CODE drop down and choose the reason for the update.
5. Click dropdown in RESOLUTION CODE and choose Written Documentation Maintained.
6. Click on REASON NOTE and enter reason for error.
7. Click Save.
8. Confirm Visit moved from INCOMPLETE TO VERIFIED in the Visit Status column.

Section 4 Frequently Asked Questions

Q: Where can I access EVV Training?

A: To enroll go to [Sandata Learn](#). Select Sign Up below the Sign In button. Enter the required information into the form, then click Sign Up.



The screenshot shows the Sandata Learn login page. At the top is the Sandata Learn logo. Below it are two input fields: 'Email address' and 'Password'. A large blue 'Sign In' button is centered below the fields. Underneath the 'Sign In' button is a link for 'Forgot my password' and a smaller 'Sign Up' button highlighted with a yellow border. At the bottom is a link for 'Click here for Support'.

Once complete, a Welcome Kit will arrive within 48-72 business hours to the email registered with the Sandata Learn portal.

Q: How do I use the Sandata Dashboard?

A: Refer to the Sandata Learn platform: [Sandata On-Demand / Sandata Learn – Sandata Technologies \(zendesk.com\)](#)

Q: Where do I find additional resources about EVV?

A: [Electronic Visit Verification \(EVV\) | Department of Vermont Health Access.](#)

Q: Where can I find a demo of Sandata Mobile Connect?

A: [Sandata Mobile Connect 2.0 Video Library – Sandata Technologies \(zendesk.com\)](#)

Q: What if the provider is locked out or can't reset their password?

A: The employee must go to the Security Administrator or Administrator to unlock the account.

Section 5 Appendix A – Agencies and Services

The following agencies and services require Electronic Visit Verification.

Type	Program	Caregiver	Location	HCPCS Code	Modifier	Prior Authorization
Supervised Living - 1:1 Staffing	DSWAIV	DA	Home	S5135	U1	Not required
Hourly Respite - Three people served	DSWAIV	DA	Home	S5150	UP	Not required
Supervised Living - 2:1 Staffing	DSWAIV	DA	Home	S5135	U2	Not required
Hourly Respite - 2:1 Staffing	DSWAIV	DA	Home	S5150	U2	Not required
Hourly Respite - Two people served	DSWAIV	DA	Home	S5150	UN	Not required
Hourly Respite - 1:1 Staffing	DSWAIV	DA	Home	S5150	U1	Not required
Supervised Living - Two people served	DSWAIV	DA	Home	S5135	UN	Not required
In-Home Hourly/Shared Living Support - 1:1 Staffing	DSWAIV	DA	Home	T2017	U1	Not required
Daily Respite - 1:1 Staffing	DSWAIV	DA	Home	S5151	U1	Not required
In-Home Hourly/Shared Living Support - 2:1 Staffing	DSWAIV	DA	Home	T2017	U2	Not required
In-Home Hourly/Shared Living Support - 2 people	DSWAIV	DA	Home	T2017	UN	Not required
Daily Respite - 2:1 Staffing	DSWAIV	DA	Home	T2017	U2	Not required
Daily Respite - Two people served	DSWAIV	DA	Home	S5151	UN	Not required
Hourly Respite	AFCR	CDS	Home	S5150		Not required
Hourly Respite	FMR	CDS	Home	S5150		Not required
Daily Respite	AFCR	CDS	Home	S5151		Not required
Daily Respite	FMR	CDS	Hom	S5151		Not required