Alternate EVV Certification and Set Up Process Checklist

This checklist outlines required steps in the certification and set up process for providers choosing to use an alternate EVV system. Providers should allow up to three months for this process.

☐ **Step 1:**

Review the Wisconsin Department of Health Services (DHS) Business Requirements for Alternate EVV Systems. This document outlines your responsibilities as a provider choosing to use an alternate EVV system.

☐ **Step 2:**

Explore alternate EVV system vendors to determine which system is right for your business.

☐ **Step 3:**

Once you have chosen your alternate EVV system, share the appropriate technical specifications document with your alternate EVV vendor. Technical specifications are found on the alternate EVV webpage.

☐ **Step 4:**

Contact Sandata at Sandata.Zendesk.com/hc/en-us to start the certification process for your alternate EVV system. This step is needed because alternate EVV systems connect to the Sandata aggregator in order to get EVV information from the alternate EVV vendor to DHS.

Return the signed Alternate Electronic Visit Verification (EVV) Attestation form, F-02659 to Sandata following the instructions on the form.

☐ **Step 5:**

If you have not already entered your workers into the ForwardHealth Portal, use the Add Worker or Upload Worker functions to add your workers, including live-in workers.

- Once your workers are added, download a list of your workers and their identification numbers from the ForwardHealth Portal, including their ForwardHealth "EmployeeIdentifier," and double check that all your workers are on the list.
- Send that list including the ForwardHealth "EmployeeIdentifier" to your alternate EVV vendor. The vendor will need these IDs to submit visits to the Sandata aggregator.

Providers are responsible for maintaining current and accurate worker information in the ForwardHealth Portal.

*For more information about worker IDs, review the EVV Portal Functionality User Guide.

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☐ **Step 6:**

Complete the Sandata aggregator portal training available through Sandata's learning management system. You will get access to Sandata's training during the certification process or by contacting Sandata at Sandata.Zendesk.com/hc/en-us.

Alternate EVV systems are required to integrate with the Sandata aggregator.

If Your Alternate EVV System is Currently Certified for Wisconsin	If Your Alternate EVV System Requires New Certification for Wisconsin
Streamlined certification process Approximately 1 week to complete	Full certification process Approximately three months to complete

☐ **Step 7: Production Ready**
 	
The provider will:
• Collect EVV visits.
• Confirm receipt of verified EVV visit data in Sandata's aggregator (after the alternate EVV vendor has sent visit data to the Sandata aggregator).
 	
The alternate EVV vendor will:
• Send visits to the Sandata aggregator using the production credentials from Sandata and begin monitoring and resolving any errors.
	☐ **Step 7: Testing Preparation**
	
	The provider will:
	• Request testing credentials and start the Alternate EVV Certification Process at Sandata.Zendesk.com/hc/en-us.
	• Provide the following alternate EVV vendor contact information to Sandata:
	  o Name
	  o Phone number
	  o Email
	  o Authorization that Sandata can work with the vendor (for example, "Sandata can now communicate directly with our alternate EVV vendor.")
	• Receive an email from Sandata containing a testing checklist and testing credentials. Provide that information to your alternate EVV vendor.
	• Receive an email from Sandata with the technical interface support team's contact information for questions and support.

	☐ **Step 8: Alternate EVV Interface Testing** The alternate EVV vendor will: • Successfully integrate and complete testing with Sandata's aggregator. • Allow for testing and error correction. • Submit initial test files at least 45 days before the date the provider plans to begin using an alternate EVV system. • Submit the completed testing checklist to Sandata and request the validation of the testing.

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	- If testing is unsuccessful, Sandata will return the checklist marked with erroneous files or scenarios to the provider. - Alternate EVV vendors must resubmit the testing checklist until all errors are corrected.
	☐ **Step 9: Production Ready** The provider will: - Collect EVV visits. - Confirm receipt of verified EVV visit data in Sandata's aggregator (after the alternate EVV vendor has sent visit data to the Sandata aggregator). The alternate EVV vendor will: - Send visits to the Sandata aggregator using the production credentials from Sandata and begin monitoring and resolving any errors.

Contact Information

Sandata Technologies
Sandata.Zendesk.com/hc/en-us
Phone: 855-705-2407

Wisconsin EVV Customer Care
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