Electronic Visit Verification: Sandata EVV Portal and System Overview

WISCONSIN DEPARTMENT
of HEALTH SERVICES

Welcome to the training for Electronic Visit Verification Portal: Sandata EVV Portal and System Overview.

Objectives

- Introduce the Sandata Electronic Visit Verification (EVV) Portal
- Understand data exchanges
- Access and log in to the Sandata EVV Portal
- Navigate the Sandata EVV Portal

Previously, we looked at the big picture of EVV. Now it's time to dig in to the DHS-provided Sandata EVV system. This segment will help you:

- Understand the Sandata Electronic Visit Verification (EVV) Portal
- Understand data exchanges
- Access and log in to the Sandata EVV Portal
- Navigate the Sandata EVV Portal

Key Terminology

- Client—A client is a member or participant who receives services through Wisconsin Medicaid.
- Employee—An employee is a person (worker) who is providing care to one or more clients.
- ADA—The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability.
- JAWS—Job Access With Speech is a computer screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or a refreshable Braille display.

Let's start by covering a few key terms:
For this training we will be using the Sandata terms, client and employee.

Client is the member or participant who receives services.

Employee is the worker providing care. Note: this is different than someone in an administrative role.

ADA—the Americans with Disabilities Act

JAWS (Job Access with Speech). This software allows blind and visually impaired users to read the screen with a text-to-speech output or refreshable Braille display. The JAWS software can be purchased and accessed as needed.

Sandata EVV Portal

Let's get some basic information about the Sandata EVV Portal.

System Introduction

- The Wisconsin Department of Health Services (DHS)-provided EVV solution is Sandata:
  - Collects EVV data only
  - Provides a solution that meets federal EVV requirements
  - Does not include billing, payroll, or scheduling
- Providers can choose to use either the DHS-provided EVV system or an alternate EVV data collection system.

The DHS provided system, Sandata, collects EVV data in the least burdensome way. It meets the federal requirements for EVV.

It's important to realize that other features, such as billing, payroll, and scheduling, are NOT included.

Providers who would like these additional features can choose an alternate EVV system. There are dozens of systems available for those who are interested.

We will keep our focus to the DHS-provided Sandata system in our trainings.

Sandata System Requirements

The Sandata EVV Portal:
- Is used by office administrative staff.
- Works best on a laptop or desktop computer.
- Operates best on Firefox or Google Chrome browsers and high-speed internet.

The Sandata EVV Portal is used by office administrative staff. When you hear "Sandata EVV **Portal,"** think of office staff and administrative responsibilities, not employees visiting clients. Independent nurses, you have both roles. The Sandata EVV Portal will contain your administrative work.

The Sandata EVV Portal works best on a laptop or desktop computer. Again: think office responsibilities here.
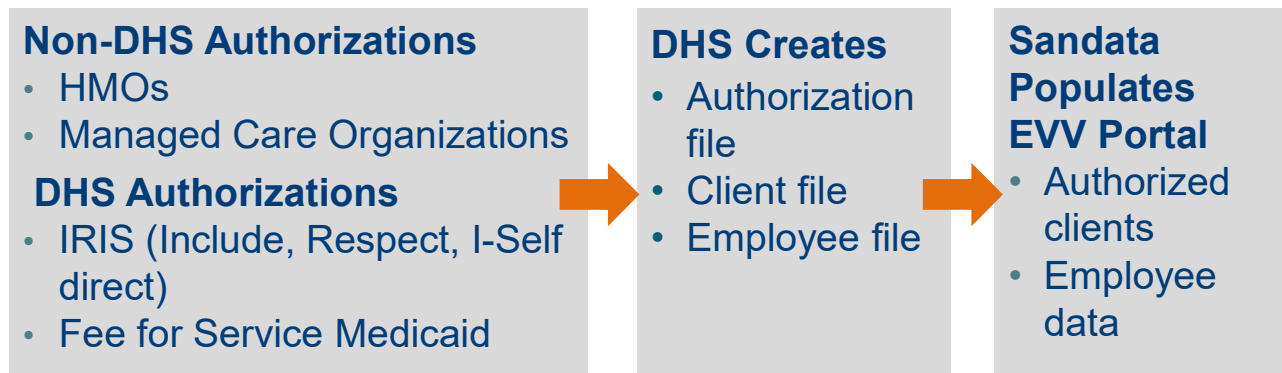
Finally, the Sandata EVV Portal operates best on Firefox or Google Chrome browsers and high-speed internet.

Data Exchange Between DHS and Sandata

Now let's move onto the data exchange between DHS and Sandata. It's a peek behind the tech curtain to help you understand how information all fits together, and what to do when that rare issue pops up.

Data Exchange

Authorization, client, and employee information only moves in one direction, from DHS to Sandata, nightly.

Non-DHS Authorizations	DHS Creates	Sandata Populates EVV Portal
• HMOs • Managed Care Organizations **DHS Authorizations** • IRIS (Include, Respect, I-Self direct) • Fee for Service Medicaid	• Authorization file • Client file • Employee file	• Authorized clients • Employee data

Where does information come from, and how does it get to a provider's Sandata EVV Portal?

Information is exchanged between DHS and Sandata nightly.

- DHS receives authorizations from HMOs and Managed Care Organizations. These, in addition to IRIS and fee-for-service authorizations that start at DHS, are sent as authorization and client files to Sandata nightly.

- Employee information from ForwardHealth are also sent as a file to Sandata nightly.

- Sandata receives and populates the client and employee information in the Sandata EVV Portal.

Here are some common questions about this process:

How long does an approved authorization take to get from an HMO or MCO to Sandata? One day to go to DHS, and a second day to go to Sandata. If an expected authorization doesn't populate a provider's Sandata EVV Portal in two days, contact EVV Customer Care.

What about clients whose service is allowed by policy without an authorization?

That client's information may not be automatically sent to the Sandata system. We'll have more about that scenario in the "Adding Required Authorization Information in the Sandata EVV Portal" training.

How long does it take for an employee added in the ForwardHealth Portal to get to Sandata? One day. If an employee's information from the ForwardHealth Portal doesn't populate a provider's Sandata EVV Portal the next day, contact EVV Customer Care. We'll have more about this in the Employee training module.

Will information I add about a client or employee in the Sandata EVV Portal flow back to other systems? No. It is important to understand that information from DHS only flows one way, to Sandata. This information will only update the Sandata EVV Portal. For example, adding an address for a client in the Sandata EVV Portal will not send that new address back to DHS or update any Medicaid systems. The usual methods for updating other systems are still in place.

Data Exchange

EVV visit information is sent to DHS and then payers.

| Sandata Visit Information | → | DHS | → | Payers |
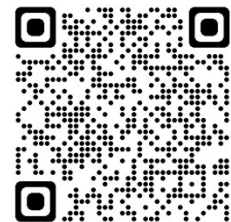
www.dhs.wisconsin.gov/publications/p03124.pdf

For its part, Sandata sends EVV visit information to DHS. This visit information is shared with the appropriate payer, so the payer can match it to claims that are submitted.

Linked here is a helpful resource sheet about how EVV fits into the bigger claims process—the whole lifecycle of a visit and the information for it. You can use the QR code: hover your cell phone camera over the box, wait for the text to appear, and tap the text. It will take you to the webpage listed here.
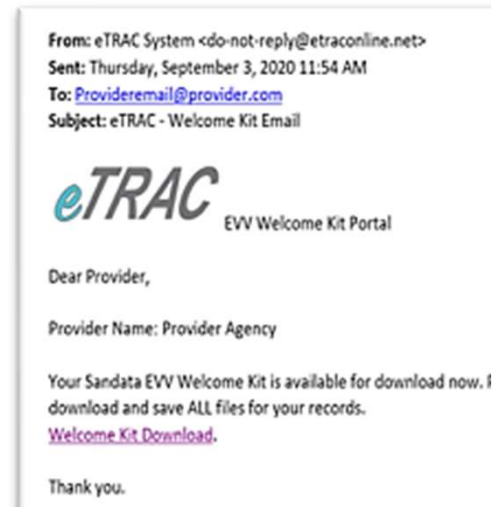
Access the Sandata EVV Portal

Now that we know how information gets to the Sandata EVV Portal, let's find out how providers access it.

Access to the Sandata EVV Portal is only needed for administrative staff. Remember—for Sandata EVV **Portal,** think of office staff and administrative responsibilities, not employees visiting clients. Independent nurses, you have both roles. The Sandata EVV Portal will contain your administrative work.

Access the Sandata EVV Portal

- Providers are given credit for training based on their MA ID and email.
- The Welcome Kit is sent from Sandata/eTrac to the "mail to" email listed in the ForwardHealth Portal.

From: eTRAC System <do-not-reply@etraconline.net>
Sent: Thursday, September 3, 2020 11:54 AM
To: Provideremail@provider.com
Subject: eTRAC - Welcome Kit Email

eTRAC EVV Welcome Kit Portal

Dear Provider,

Provider Name: Provider Agency

Your Sandata EVV Welcome Kit is available for download now. I download and save ALL files for your records.
Welcome Kit Download.

Thank you.

An administrator completes EVV training. DHS credits the proper provider based on:
- The provider's MA ID.
- The provider's email matching the ForwardHealth Portal's "mail to" address.

Providers, an important piece of homework for you is to make sure you know what is on file for you in ForwardHealth. Know your MA ID (it will be 8 or 9 digits, and is different from your 10 digit NPI number), and know which email address is listed in ForwardHealth. If you need assistance with either of these, please contact EVV Customer Care; we'll display their contact information towards the end.

The Welcome Kit is sent from Sandata (eTRAC) to the email address listed in the ForwardHealth provider file as the 'mail to' email address. You may need to check your spam folder. If there seems to be a delay, contact Wisconsin EVV Customer Care for assistance.

Access the Sandata EVV Portal

The Welcome Kit email contains:
- The Sandata EVV Portal weblink.
- Sandata EVV Portal security administrator login credentials.
- Service list, task list, Call Reference Guides and assigned toll-free phone number for visits.

Sandata

Dear Provider:

Welcome to the Wisconsin Department of Health Services (DHS) Electronic Visit Verification (EVV) Program provided by Sandata Technologies. You can now set up administrative users for your Sandata EVV system by following these quick steps:

- **Access the Sandata EVV Login page:** https://evv.sandata.com/VM/Login.

  Quick Tip: To quickly access your EVV system every time, bookmark this webpage. Here are instructions on how to do it for different browsers:
  Mozilla Firefox
  Google Chrome
  Microsoft Edge

- **Enter your administrative credentials:**
  - Agency: STX «####»
  - Username: «Username»
  - Temporary Password: «EVV Account Password»

- **Change your password.**
  The temporary password is valid for 60 days. After successfully logging in with your temporary credentials, the system will prompt you to change your password immediately for security reasons.

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The Welcome Kit email contains these items that you'll use right away:
•The Sandata EVV Portal weblink.
•Sandata EVV Portal security administrator login credentials, including username, Sandata agency ID, username, and temporary password.

It will also contain items that will be used later when employees collect visit information:
Service list, task list, Call Reference Guides and assigned toll-free phone number for visits. Let's put these to the side for the moment and move forward with logging in to the Sandata EVV Portal.

Access the Sandata EVV Portal

1. Agency—STX followed by provider agency ID number (Example: STX12345).
2. Username—Email address of the assigned system user (not case sensitive).
3. Password—Temporary password from the Welcome Kit

Sandata

AGENCY ❶
STX123456

USERNAME ❷
Enter Username

PASSWORD ❸
Enter Password 👁

☐ REMEMBER ME

LOGIN

Forgot Password?

Privacy Policy

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Use that Welcome Kit information to log in to the Sandata EVV portal.
Follow the link provided. You'll use these items from the Welcome Kit:
1. Agency—STX followed by provider agency ID number (Example: STX12345). This will be five digits long and will be used only in Sandata.
2. Username—Email address of the assigned system user (not case sensitive).
3. Password—Copy and paste the temporary password from the Welcome Kit.

Access the Sandata EVV Portal

4. Remember Me—Check this box to store your agency and username (not the password).
5. Login—Click this button to access Sandata EVV Portal.

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4. Remember Me—Check this box to store your agency and username (not the password). It's not required, but is a convenience.
5. Login—Click this button to access Sandata EVV Portal.

When you are setting up the first time, the next screen you'll see will help you set up a new, permanent password. We'll talk about that more in the "Security" module of training.

Navigate the Sandata EVV Portal

Let's talk abut how to navigate the Sandata EVV Portal.
Remember—for Sandata EVV **Portal,** think of office staff and administrative responsibilities, not employees visiting clients. Independent nurses, you have both roles. The Sandata EVV Portal will contain your administrative work.

Navigate Modules

- After successful login, the Dashboard screen is displayed.
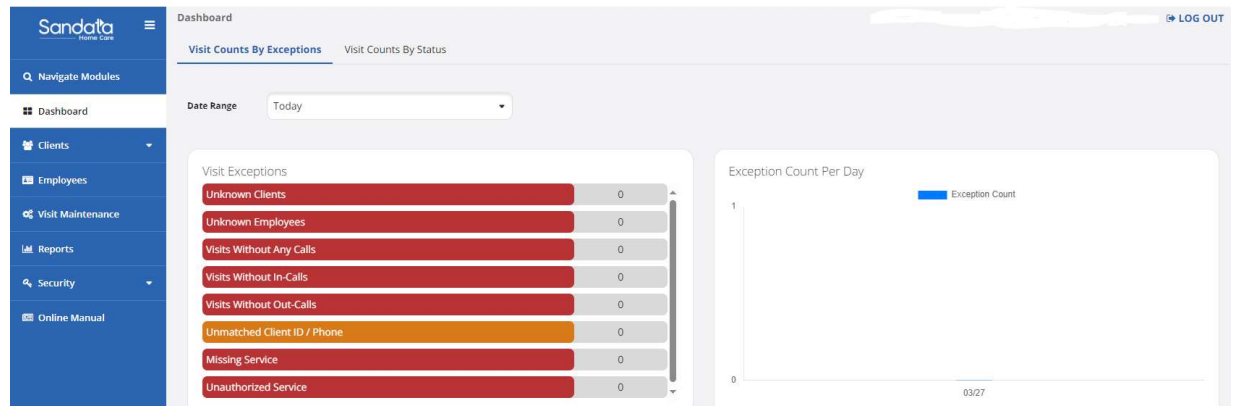
This view, called the "Dashboard" gives a quick "today's news" type summary. We'll cover the visit exceptions and exception count per day details in the Visit Maintenance training.

On the left side is the EVV Portal navigation panel.

Options are: Navigate Modules, Dashboard, Clients, Employees, Visit Maintenance, Reports, and Security. Our trainings will touch on each of these modules.

The last item on the left, Online Manual, will open up Sandata's full manual. You can search for topics there. Be aware that it is not Wisconsin specific, and so information about billing, payroll, and schedules will be there. These are not included in the DHS-provided Sandata system for Wisconsin.

Navigating Common Elements

The Sandata header is located at the top of every screen in the Sandata EVV Portal and displays key information about each screen:

1. The Navigation Path shows the exact location in the system and the current screen.

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1. The Navigation Path shows the exact location in the system and the current screen. This is similar to "cookies" you may see on websites.

Navigating Common Elements

2. Account and User Display shows the account of the logged in user.

3. Log Out logs the user out of the system and returns to the log in screen.
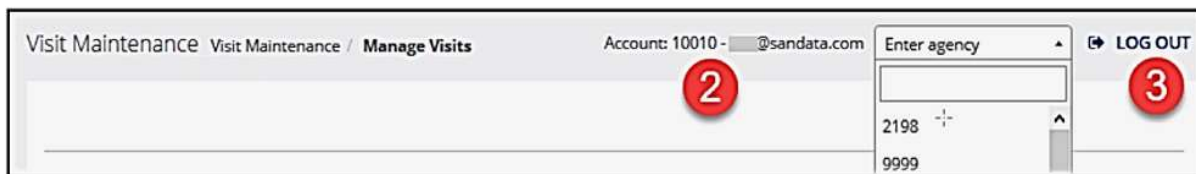
Item 2 displays the Agency account the user is logged into and the email address of the user currently logged in with.

The "Enter agency" field provides the ability for users to move between multiple accounts without having to log out and log back in to the portal. Click the small arrow pointer in the 'Enter agency' field to display a list of agencies associated to this username. Selecting the agency number moves the user to that agency account.

This function only works if the user works for multiple provider agencies and used the same email address for each agency.

Finally, there's the Log Out at the upper right, item #3 here.

Navigating Common Elements

Any confirmation or error messages will appear at the top center of the screen.

Error messages will provide additional detail of what is needed.

Navigating Common Elements

Assignment buttons appear whenever a screen has a setting that requires moving items between available and assigned fields.

Button	Function	Description
»	Add All	This button moves **all** items from the Available field to the Assigned field.
›	Add Item(s)	This button moves single or multiple items from the Available field to the Assigned field. Click on multiple items to add them together, if necessary.
‹	Remove Item(s)	This button moves single or multiple items from the Assigned field to the Available field. Click on multiple items to add them together, if necessary.
«	Remove All	This button moves **all** Items from the Assigned field to the Available field.

Assignment buttons appear whenever a screen has a setting that requires moving items between available and assigned fields.

The directions of the arrows is where the item will move. Double arrows add/remove 'all' items and Single arrow add/removes selected items.

ADA Navigation Support

- The Sandata EVV Portal can be navigated using only the tab and enter keys if needed.
- The Sandata EVV Portal is JAWS Reader compliant for those who are visually impaired.

The Sandata EVV Portal is ADA compliant.

If mouse use is difficult, another way users can navigate the screens is by using the tab and enter keys.

The Sandata EVV Portal is also JAWS (Job Access With Speech) compliant for those with visual impairments who use the screen reader software.

ADA Navigation Support

- Tab to or click on **Navigate Modules** from the Sandata EVV Portal panel.
- Start typing a module and a list will appear for selection.

Another way to navigate to a specific module with only the keyboard is by using the Navigate Modules field. Tab to this field and begin typing a field name and options will appear. Tab to the option you need and then click enter.

ADA Navigation Support

When a user remains idle for 15 minutes, the system displays a warning message with a button to extend the session if they require more time.

Info

Your session is expiring.

CLICK TO EXTEND SESSION.
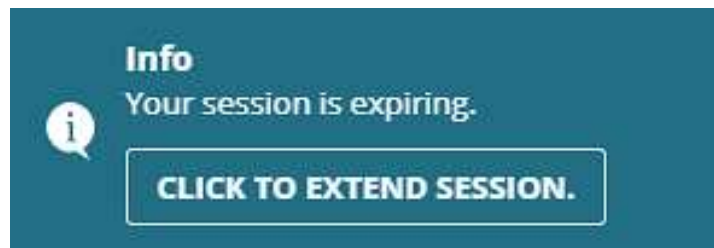
Another feature is 15 minutes idle time. If there's 15 minutes of idle time, this warning will display. If the user doesn't respond within 2 minutes of the warning, the Sandata EVV Portal will automatically log off the user.

Resources

Know that we are here to help, and providers have many resources available.

Resources

- Wisconsin EVV Customer Care:
  - Phone: 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.
  - Email: VDXC.ContactEVV@wisconsin.gov
- EVV webpage at www.dhs.wi.gov/evv/index.htm
  - Training resources
  - Information about EVV in Wisconsin

EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m. Our customer service team are specially trained for EVV and only take EVV calls.

Email support at VDXC.ContactEVV@wisconsin.gov

EVV webpage at www.dhs.wisconsin.gov/evv/index.htm for information about the following:

Training Resources

EVV in Wisconsin

Thank You

Thank you for the important services you provide to members.

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of HEALTH SERVICES