SANDATA
ELECTRONIC VISIT VERIFICATION

November 2019

Sandata Mobile Connect (SMC)

CT CDS – SMC & TVV

INTRODUCTION

◆ As part of the Sandata EVV system

- ◆ Employees providing care, call-in and call-out for every visit.

- ◆ The call process captures the visit start and end times, the service provided and the tasks performed.

CT CDS – SMC & TVV

INTRODUCTION

◆ To capture this information either:

  ◆ Download the Sandata mobile application to smart phone/tablet device
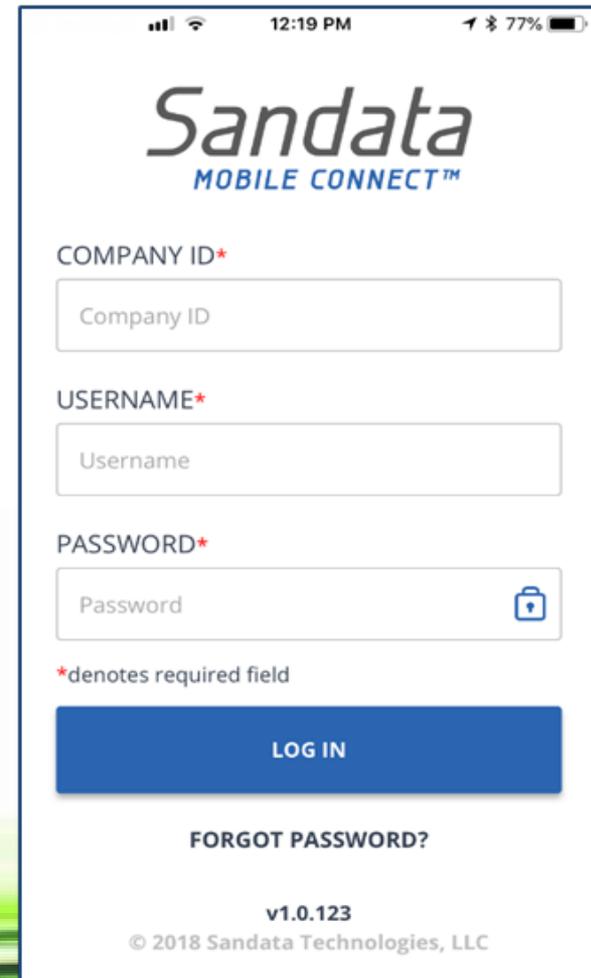
CT CDS – SMC & TVV

INTRODUCTION

◆ The mobile app, Sandata Mobile Connect (SMC) is a method which allows the employee to start and end a visit without requiring the use of the employer's home telephone.

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REQUIREMENTS

◆ As part of the visit call-out process, the employee passes the device to the employer to confirm the service and times for a visit and provide an electronic signature, by signing on the device or recording the voice.

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REQUIREMENTS: INITIAL SET-UP

◆ When you log in to SMC for the first time, you will need to enter the following data elements:

- Company ID: 2-Sandata account # (always the number 2, a dash and the agency provider's assigned Sandata account #)

- Username: employee's email address

- Password: the temporary password emailed to the employee's email address entered when creating the employee

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◆ Upon logging in to SMC for the first time, the employee is asked to select and define answers to a set of security questions.
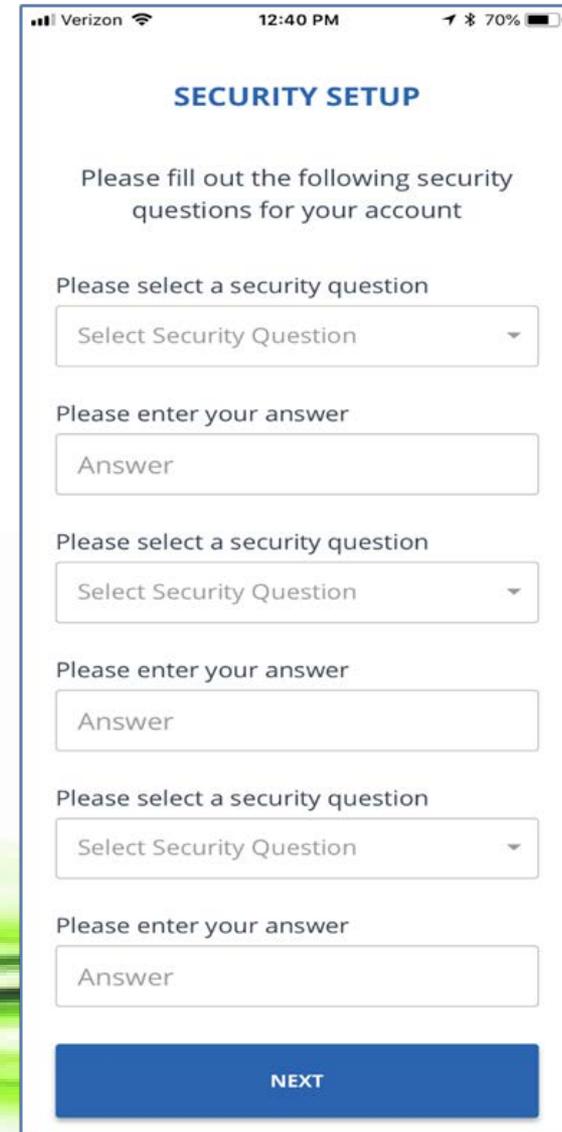
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◆ After answering the required security questions, the next screen prompts the employee to create a new password.
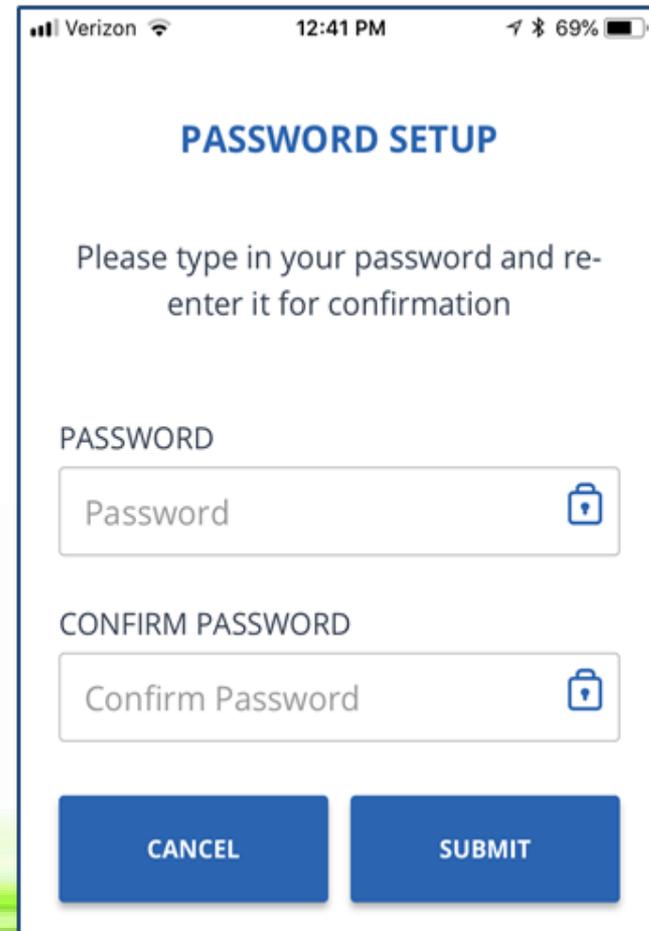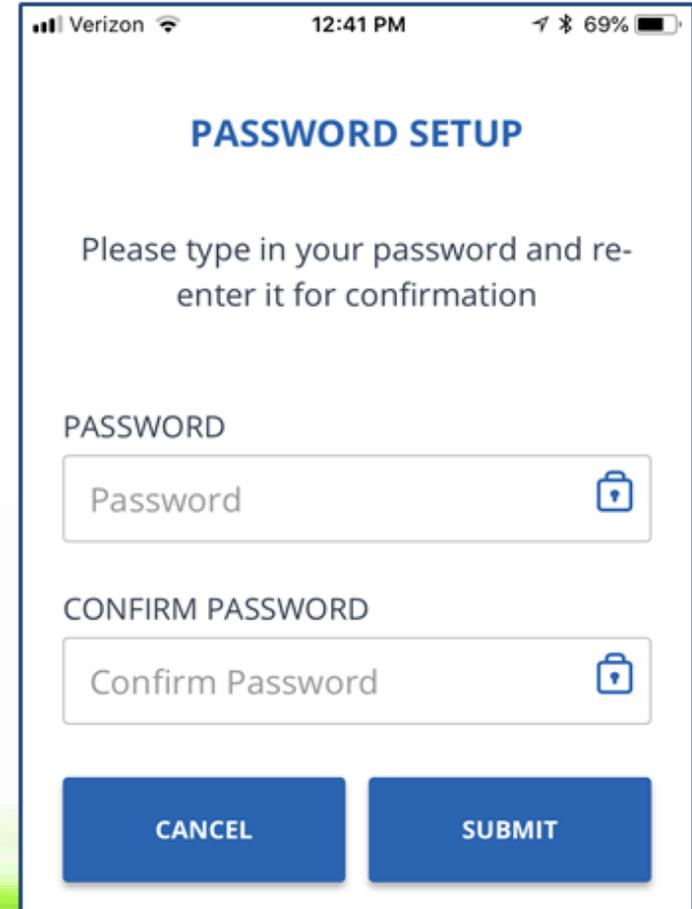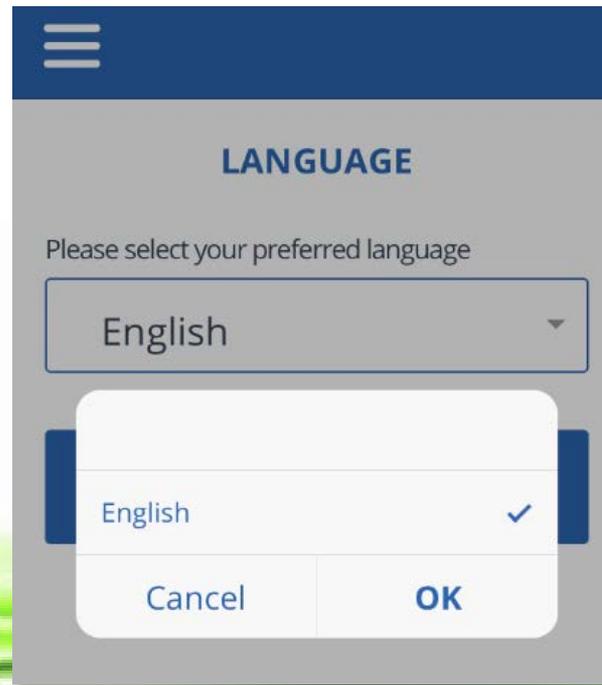
REQUIREMENTS: INITIAL SET-UP

◆ After answering the required security questions, the next screen prompts the employee to create a new password.

   ◆ Passwords are case sensitive. They must be at least eight characters long, have at least one upper case, one lower case letter, one numeric character and one "special" character (i.e. @#$%^).

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REQUIREMENTS: INITIAL SET-UP

◆ After successfully logging in with the new password, the next screen prompts the employee to confirm the language preference from a drop-down list on the screen.

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◆ Upon successfully logging in to SMC, the user is presented with the Home screen. From this screen, the user is able to:

◆ Tap on the name to select the client
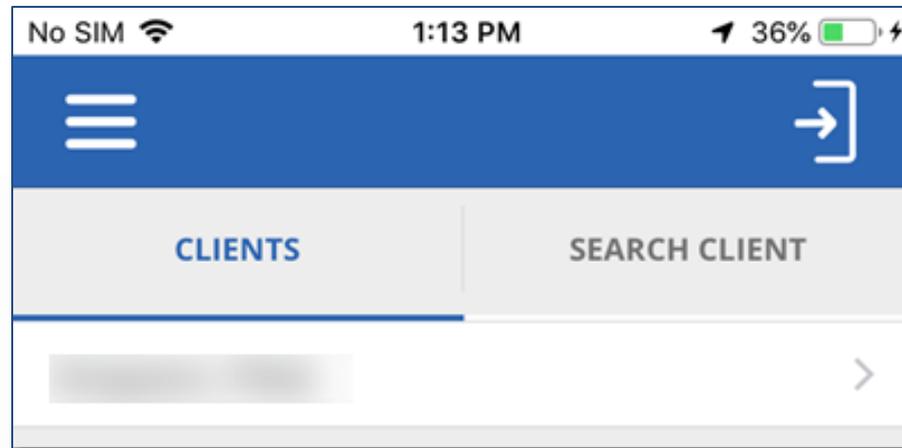
NAVIGATING THE HOME SCREEN

◆ The user can also tap the menu icon in the upper-left corner of the screen to access:

- ◆ My Visits -

- ◆ Clients – to perform a client search.

- ◆ Settings – to change language preference and password. All other options on the settings screen are disabled.

- ◆ GPS Map

- ◆ Help – to open the SMC help guide.

- ◆ Sign Out – to exit SMC (The user can also tap the Sign Out icon in the upper-right corner of the screen to log out of SMC).
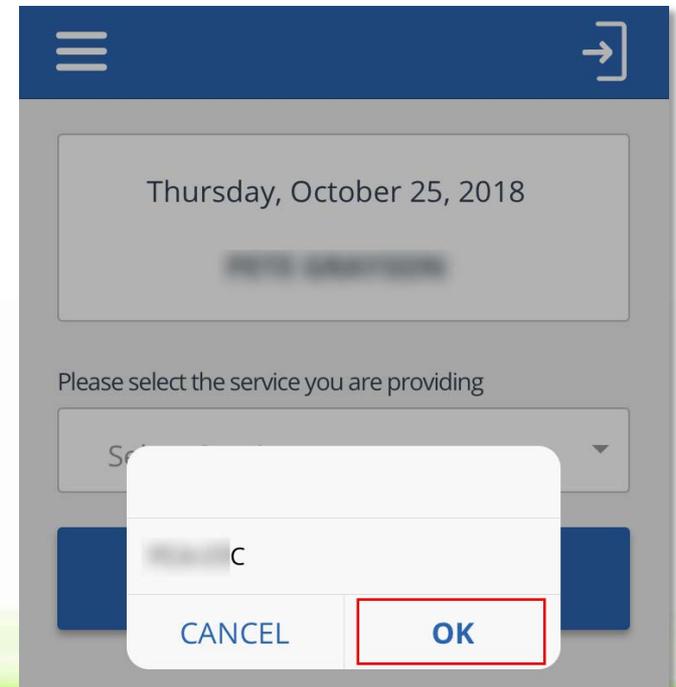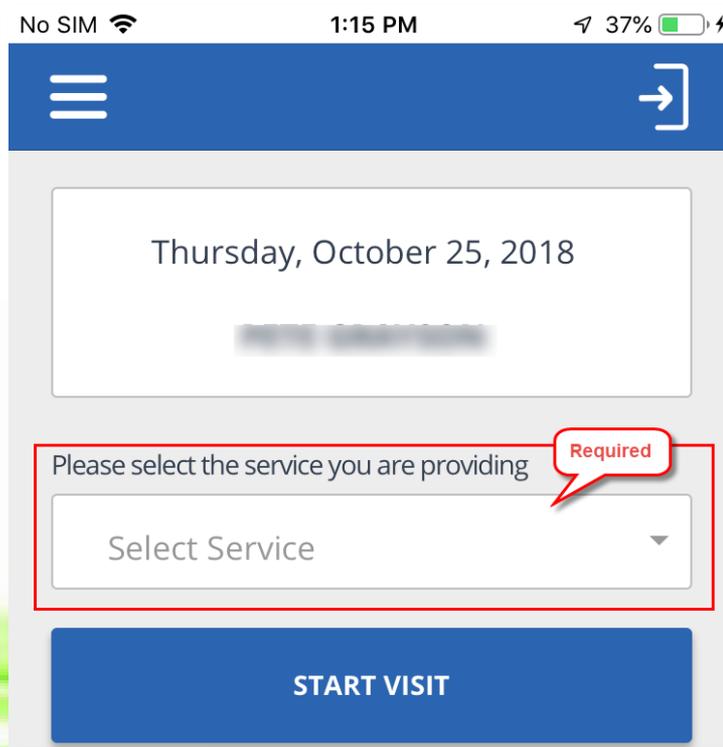
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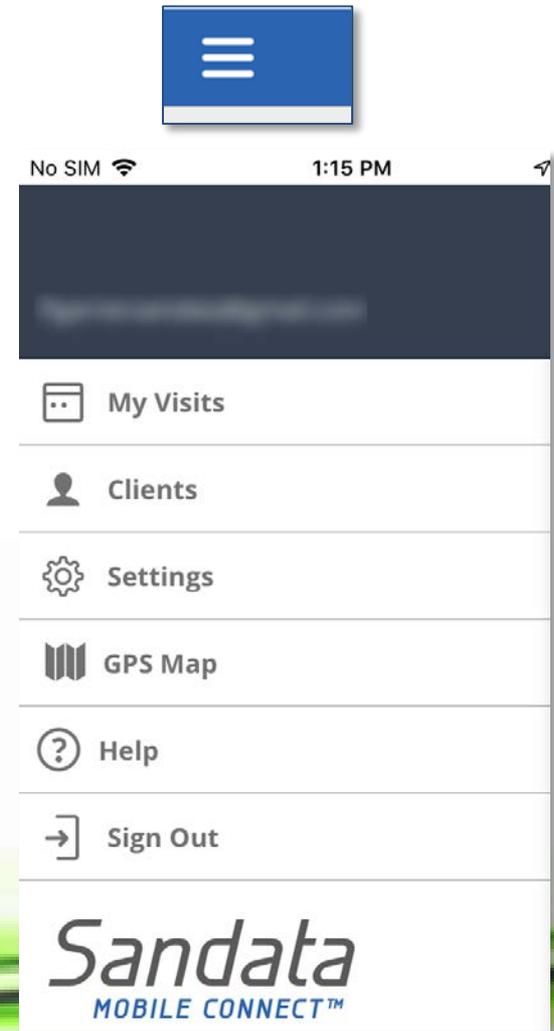
STARTING A VISIT

1. Log in to SMC.

2. Tap the displayed client.

3. Tap the **CONTINUE.**

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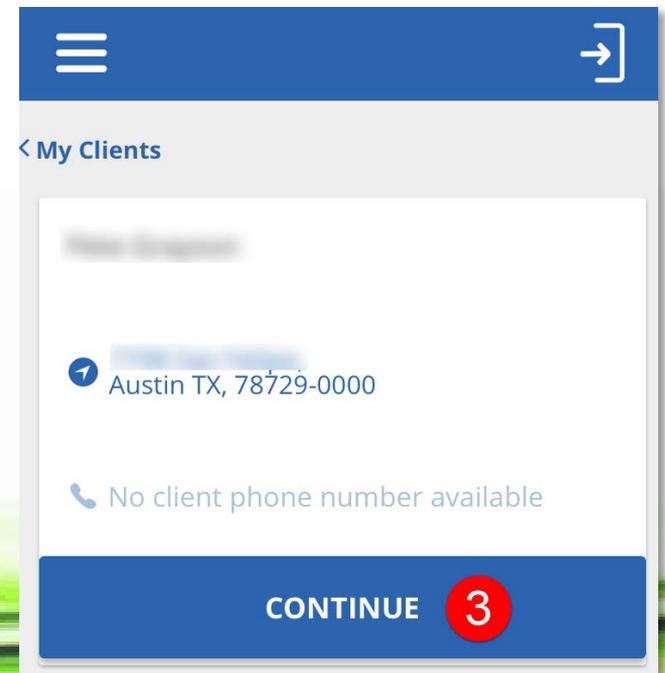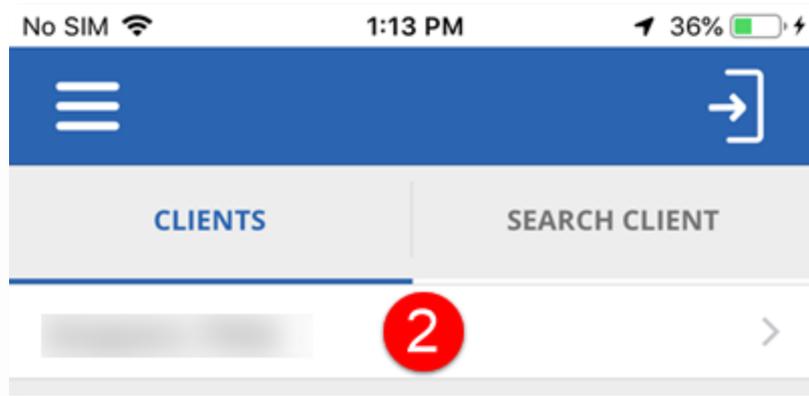
4. Tap on the desired **Service** from the drop-down list and tap **OK.**

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STARTING A VISIT
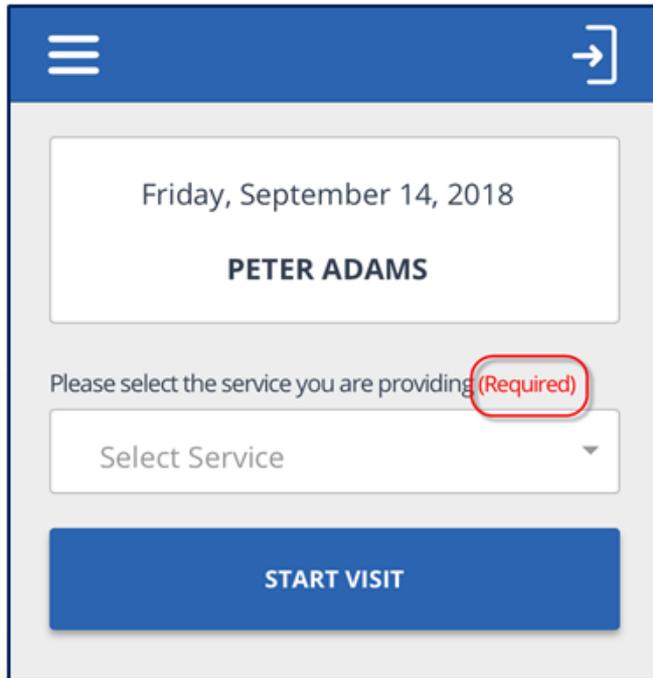
6. Tap **Start Visit**.

7. Tap **Yes** to confirm the start of the visit.
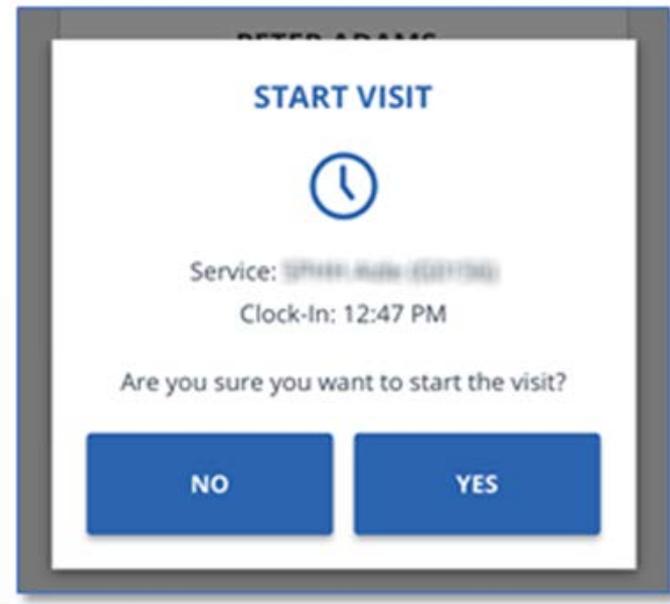
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SMC CHECK IN DEMO

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COMPLETING A VISIT: EMPLOYEE

1. Log in to SMC.

2. Tap **RESUME VISIT.**
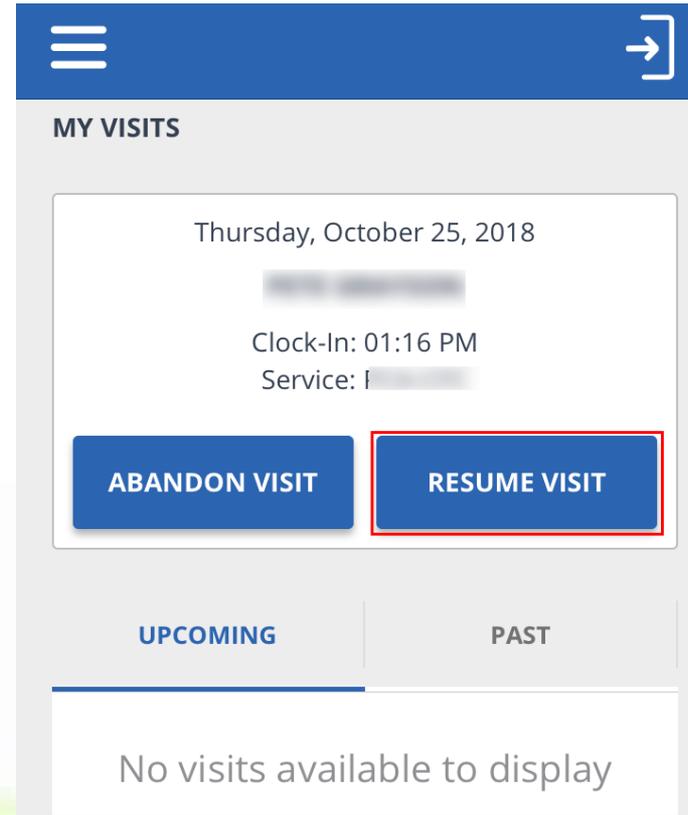
3. Tap **ADD TASKS.** Select the tasks performed.

4. Select if task completed or refused.

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3. Tap **VISIT NOTE** to enter a note, if necessary.

4. Tap **COMPLETE VISIT**.

COMPLETING A VISIT: EMPLOYEE

5. Tap **CONFIRM** and pass the device to the client.
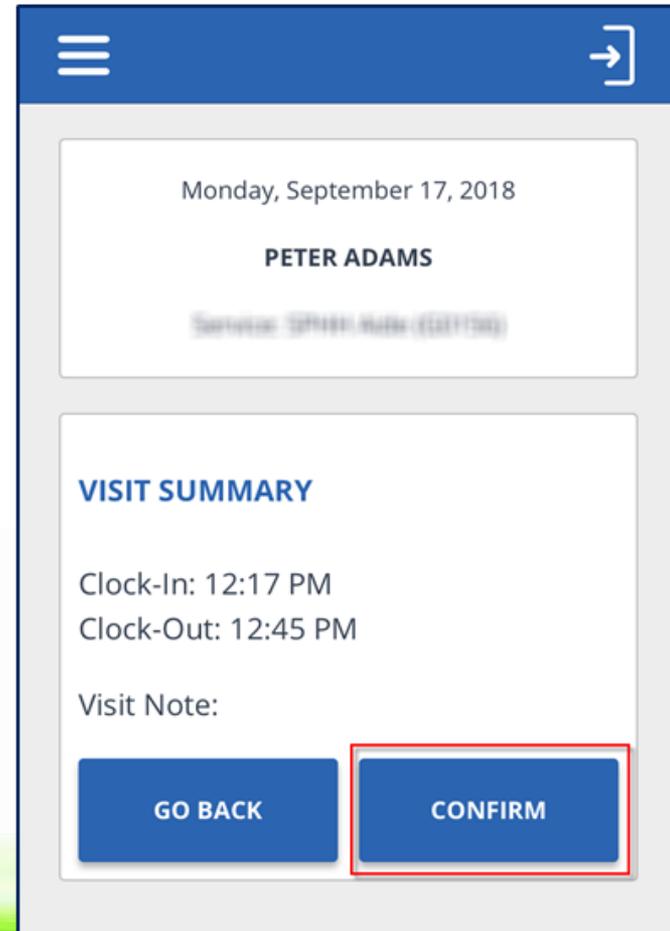
1. Tap **CONTINUE**.

2. Select preferred language.

3. Tap **CONTINUE.**

4. Tap either **DENY** or **CONFIRM** for both the **Service** and the **Visit Time**.

5. Tap **CONTINUE**.

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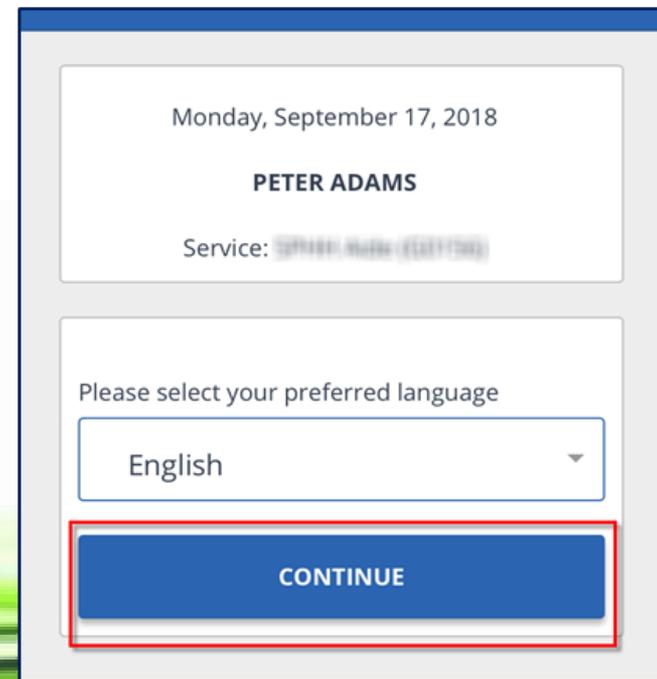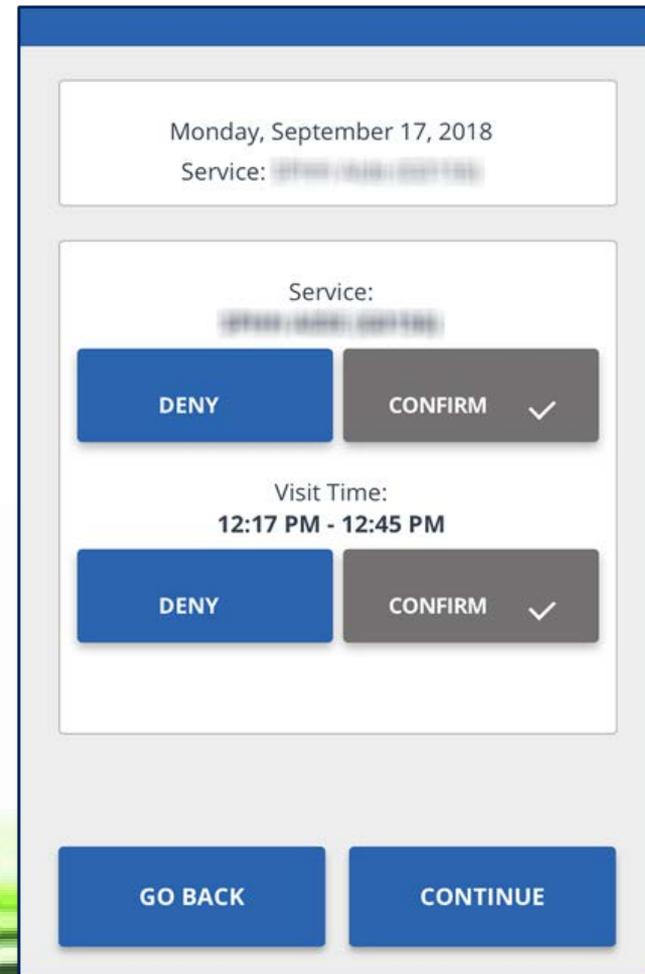
6. Tap **CONFIRM.**

Monday, September 17, 2018

PETER ADAMS

Service:

CONFIRMATION SUMMARY

Service: Confirmed
Visit Time: Confirmed

GO BACK   CONFIRM

◆ There are 2 methods of client signature for confirmation/approval of a visit:

◆ Signature

◆ Voice Recording

◆ Signature: Sign in the box
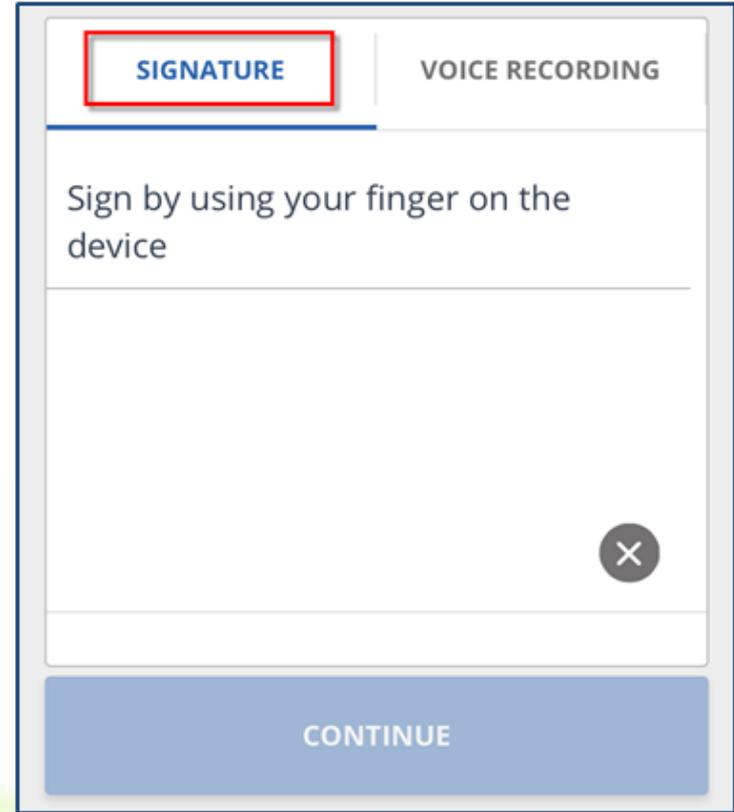
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◆ Voice Recording:

1. Tap the circle to record your name and the date.

2. Tap the circle to end the recording.

3. Tap **CONTINUE**.
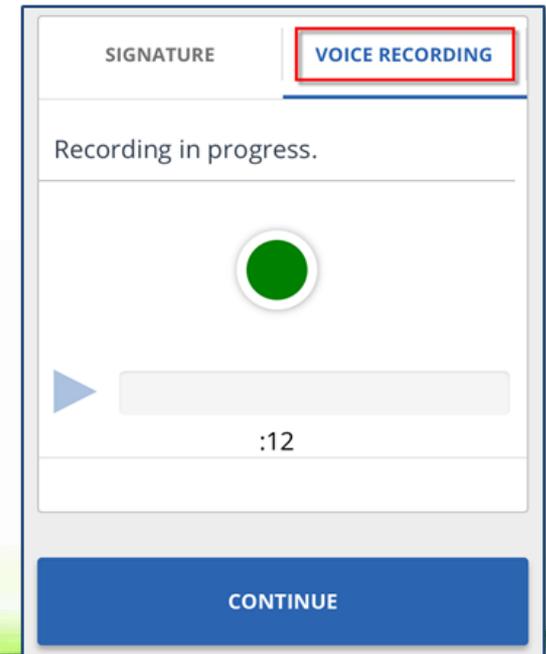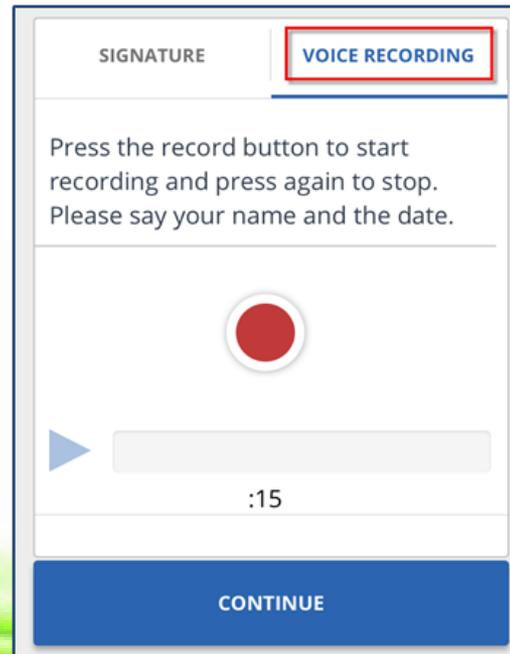
Identification Summary

- ◆ If both voice recording and signature exists, SMC prompts the user to choose which confirmation to associate to the visit.
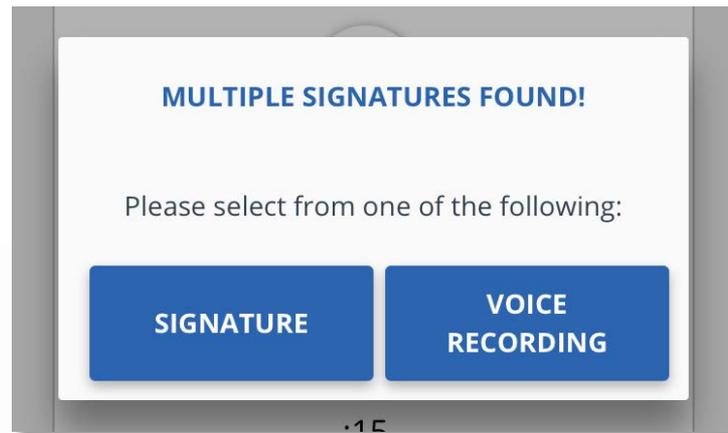
4. Tap **SUBMIT**.

5. Tap **Continue**. The visit is successfully submitted and the initial Login screen displays.

SMC CHECK OUT DEMO

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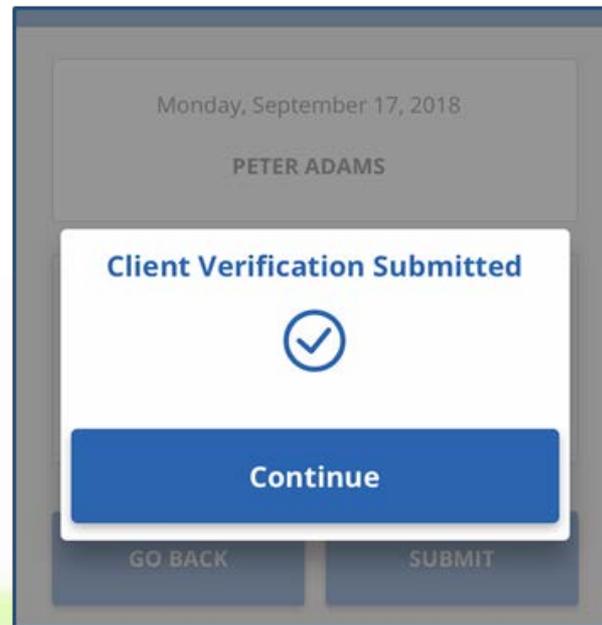
Telephonic Visit Verification (TVV)

CT CDS – SMC & TVV

TVV

- TVV is available as an alternative to the mobile app call-in/call-out process.

- TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, etc.).

CT CDS – SMC & TVV

Sandata Consumer Direction Telephone Visit Verification (TVV) Toolkit

Provider Account Number: <u>14420</u>
Santrax ID: _____
Client ID: _____

LANGUAGE	DIAL
English	1-866-306-3969 or 1-855-368-4207
Spanish	1-866-308-0238 or 1-855-368-4208

Call In Instructions

When you arrive at your client's home, you will need your Santrax ID to call in. You must call in using a touch-tone phone. A cell phone is a touch-tone phone.

1. Dial any of the toll-free numbers above.

2. Santrax will say: "Welcome, please enter your Santrax ID."
   Enter your Santrax ID.

3. Santrax will say: "To verify your identity please repeat at Santrax, my voice is my password."
   Say, "At Santrax, my voice is my password."

4. Santrax will say: "If this is a fixed visit verification visit using the FVV device, press the star key to enter the visit verification numbers. Otherwise press the pound key to continue."
   Press the # key to continue.

5. Santrax will say: "Please select one to call in or two to call out."
   Press the one (1) key to "Call In".

6. Santrax will say: "Received at (TIME). Thank you, bye."
   Hang up.

Sandata Consumer Direction Telephone Visit Verification (TVV) Toolkit

Provider Account Number: <u>14420</u>
Santrax ID: _____
Client ID: _____

LANGUAGE	DIAL
English	1-866-306-3969 or 1-855-368-4207
Spanish	1-866-308-0238 or 1-855-368-4208

Call Out Instructions

Before you leave your client's home, you will need to call out using your Santrax ID, service ID and the task IDs for the activities performed during the visit. Your client should be available to verify your visit, service, and task entries.

1. Dial any of the toll-free numbers above.

2. Santrax will say: "Welcome, please enter your Santrax ID."
   Enter your Santrax ID.

3. Santrax will say: "To verify your identity please repeat at Santrax, my voice is my password."
   Say, "At Santrax, my voice is my password."

4. Santrax will say: "If this is a fixed visit verification visit using the FVV device, press the star key to enter the visit verification numbers. Otherwise press the pound key to continue."
   Press the # key to continue.

5. Santrax will say: "Please select one to call in or two to call out."
   Press the two (2) key to "Call Out".

6. Santrax will say: "Received at (TIME). Please enter the first client ID or hang up if done." **Enter the client ID.**

7. Santrax will say: "Please enter the service ID." **Enter the service ID.**

8. Santrax will say: "You entered (SERVICE). Please press one to accept, two to retry." Once the service has been entered, the system will repeat it. If the service is incorrect, press the two (2) key to re-enter the service. **When the service is correct, press the one (1) key to accept.**

9. Santrax will say: "Enter the number of tasks." **Enter the number of tasks you performed during the visit.** If the number of tasks is incorrect, press the two (2) key to re-enter the number of tasks. **When the number of tasks is correct, press the one (1) key to accept.**

10. Santrax will say: "Please enter the task ID." **Enter the numbers of the task IDs for each task you did during your visit.** Once each task has been entered, the system will repeat it. If the task is incorrect, press the two (2) key to re-enter the task. When the task is correct, press the one (1) key to accept. **Repeat until you have entered all Task IDs for the activities performed during the visit.**

11. Santrax will then say: "To record the client's voice please press one and hand the phone to the client or press two if the client is unable to participate." **If the client is able to participate, hand the phone to the client.** Santrax will say: "Please say your first and last name and today's date."

12. The client should say his/her first and last name and the current day's date.
NOTE: The system may skip the following prompts. If the prompt is skipped, please continue with the next prompt, or hang up if you are done.

13. Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press one to confirm, two to deny, or three to replay." The client should press the one (1) key to confirm, the two (2) key to deny, or the three (3) key to replay.

14. Santrax will then say: "Thank you, bye." **Hang up.**

Sandata Consumer Direction Telephone Visit Verification (TVV) Toolkit

Service IDs

SERVICE ID	DESCRIPTION	SERVICE ID	DESCRIPTION
100	Personal Care Assistance Services	113	PCA Respite, Individual per Diem, Cannot Be Completed, Prorated Hourly
101	Personal Care Services, per Diem	114	Personal Care Respite Services, per Diem
102	PCA Per Diem Prorated	115	Respite, PCA, Individual, Overnight, Prorated Hourly
103	Personal Care Services, Overnight	116	Respite, PCA, Individual, Overnight
104	PCA Overnight Prorated	117	Personal Care Respite Services, per 15 Minutes Individual
105	Support Broker – Individual	118	Personal Care Services, per Unit
106	Chore Service Individual	119	Physical Therapy Coach
107	Individual Companion per ¼ Hour	120	Recovery Assistant II Individual, per 15 Minutes
108	Companion Individual	121	Recovery Assistant Individual, per 15 Minutes
109	Homemaker Individual per 15 Minutes	122	Respite Care, per Hour
110	Independent Living Skill Development (Individual) per Hour	123	Speech Language Therapy Coach
111	Skilled Services of a Licensed Nurse, Training/Education	124	Support and Planning Coach, Agency
112	Occupational Therapy Coach	125	Support and Planning Coach, Individual

ENGLISH CALL TOOLKIT

Sandata Consumer Direction Electronic Visit Verification (EVV) Call Toolkit

Task IDs

TASK ID	DESCRIPTION
200	Accompany to medical appointment
240	Assist with ambulation/mobility/transfer
261	Bathing
280	Diet monitoring/meal preparation/education
290	Dressing/undressing
320	Errands
330	Feeding/Eating
341	Grooming/Hygiene
390	Laundry
400	Light housework
430	Medication reminder/cueing
431	Medication Administration
490	Passive and active range of motion exercises
500	Personal business (bill paying, communications)
590	Toileting/bowel and bladder care
610	Turning, positioning and transferring
700	Goal 1
701	Goal 2
702	Goal 3

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TVV CALL OUT DEMO

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EVV Portal

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OVERVIEW

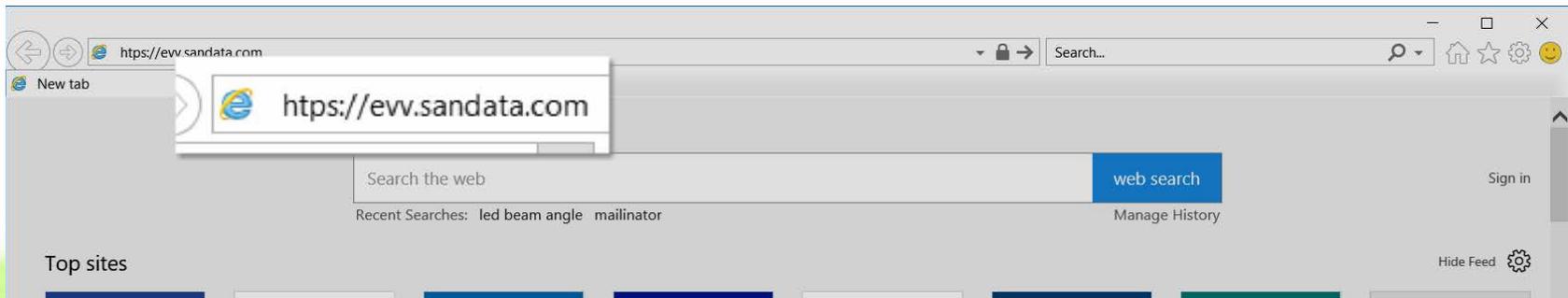## ◆How to Log In

1. From your computer, open an web browser such as Internet Explorer, Mozilla Firefox or Google Chrome.
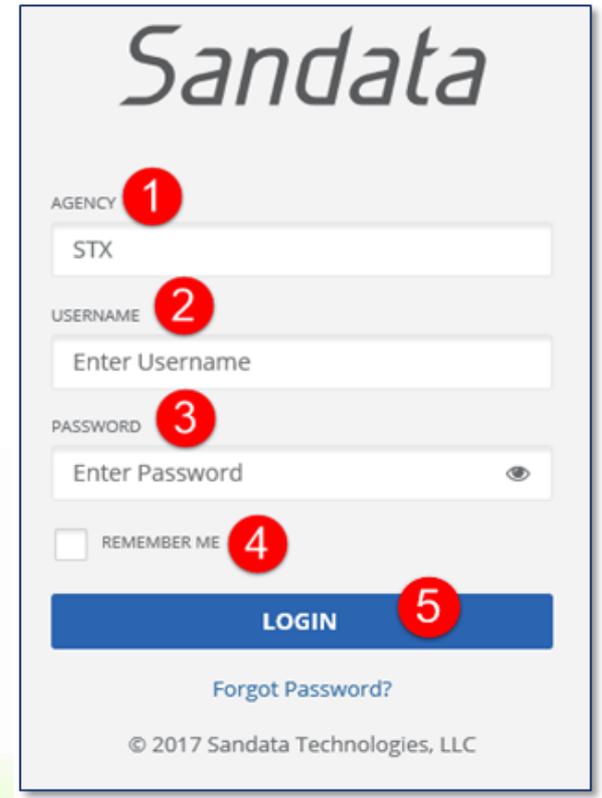
2. Type the website **https://evv.sandata.com** at the top of the screen

CT CDS – SMC & TVV

OVERVIEW

◆How to Log In:

1. Enter your **AGENCY STX** number.

2. Enter your **USERNAME.**

3. Enter your **PASSWORD.**
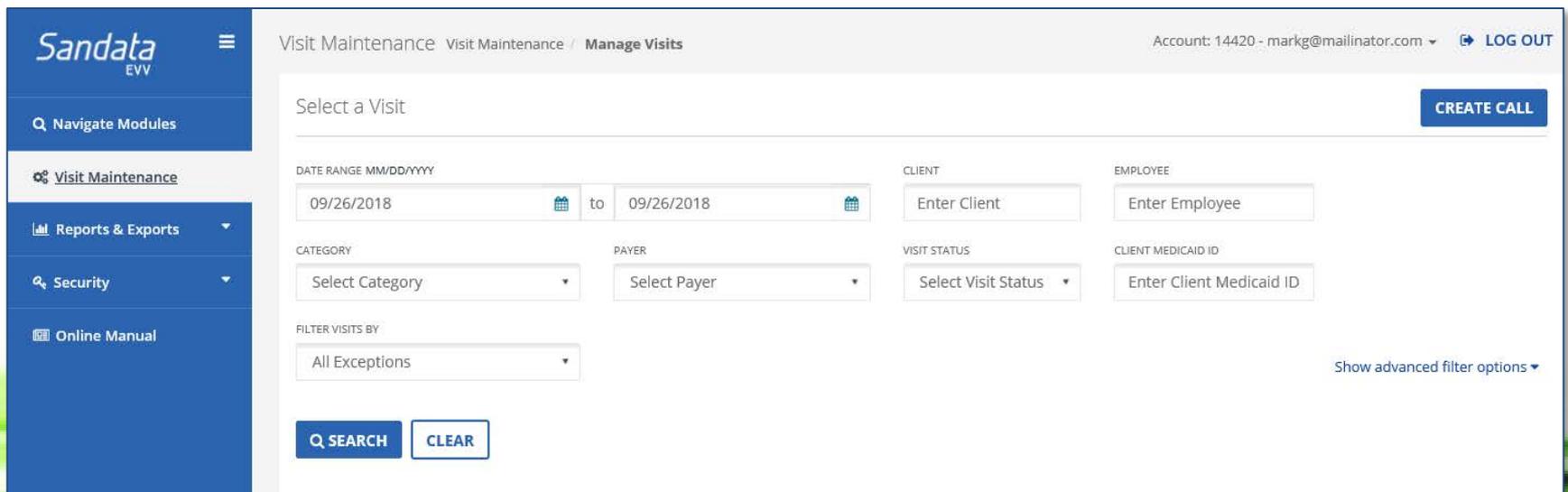
   (i) *Remember, passwords are case sensitive*

4. Check the **REMEMBER ME** box if you want the Agency STX number and Username saved.

5. Click **LOGIN**
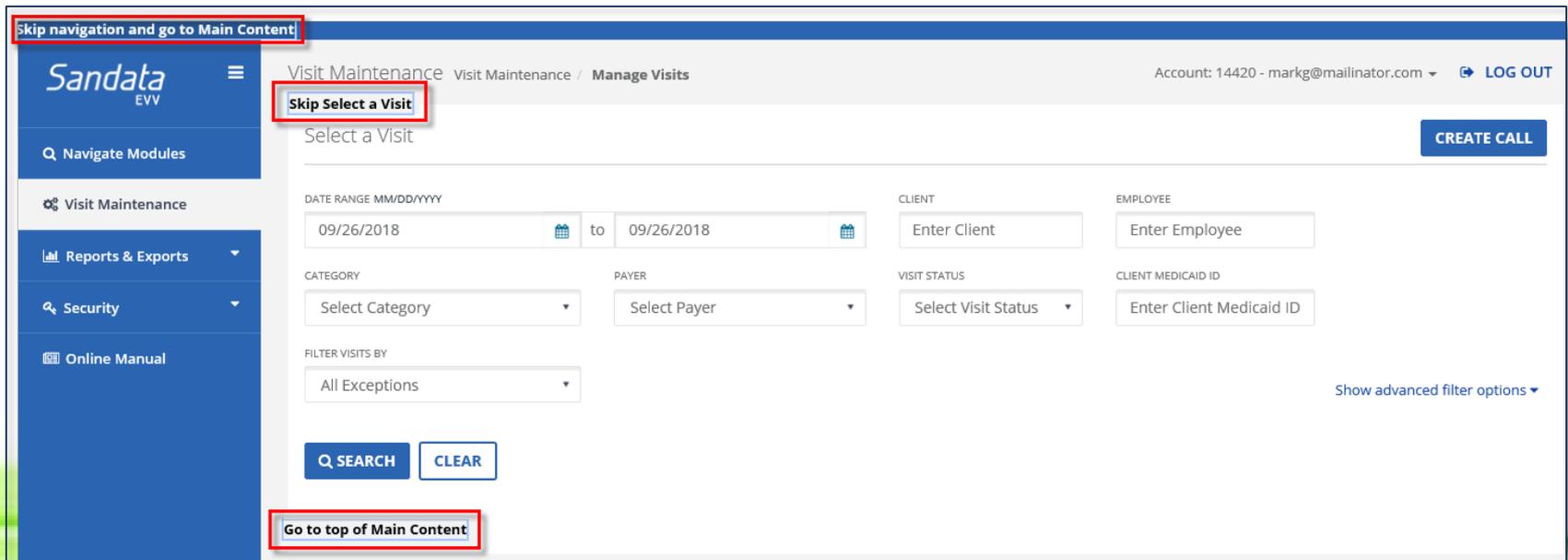
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OVERVIEW

◆Navigating the Portal

◆ After successful login, the *Visit Maintenance* screen displays.

◆ Available modules are listed on the panel to the left of the screen.

OVERVIEW

◆ Navigating the Portal

    ◆ Use the <**Tab**> key on the computer keyboard to move through the system.

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OVERVIEW

◆Navigating the Portal

◆ Clicking **Navigate Modules** on the *Navigation* panel opens the **Navigate Modules** field. This allows users to jump between screens by typing the name of the screen.

Visit Maintenance

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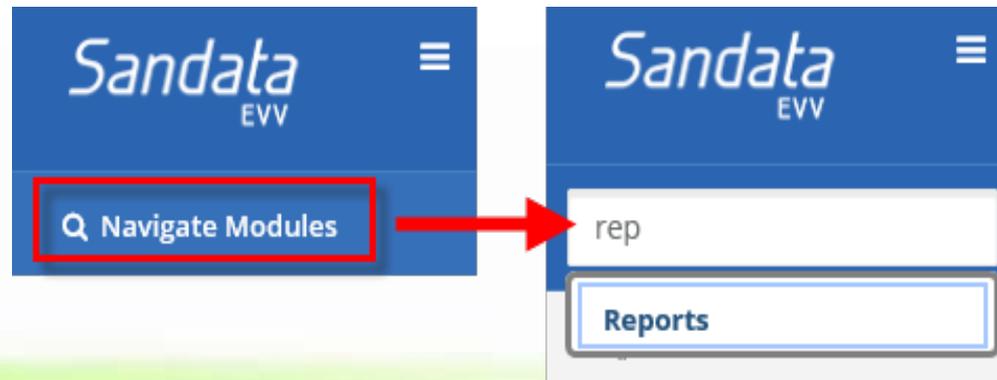
INTRODUCTION
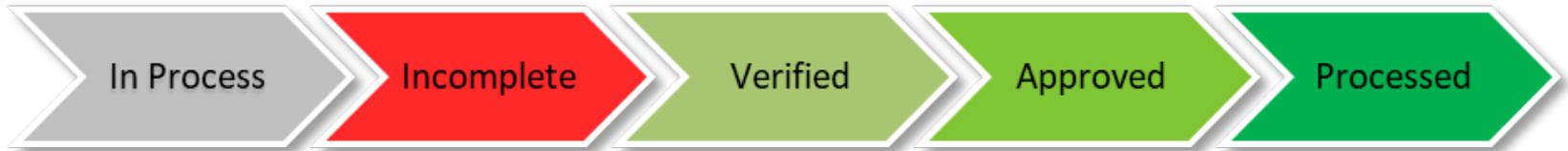
- The Visit Maintenance module provides the ability to review, modify and correct incomplete visits so they can be approved for payroll purposes.

- A visit includes an employee, a client, a service, GPS location for the mobile app or the telephone number, the client verification information, as well as call-in and call-out times (date and time) from a client's location.

CT CDS – SMC & TVV

INTRODUCTION

- If a visit is missing information or information could not be verified, the Sandata EVV system will list the issue as an "exception". There are two types of exceptions, ones that need to be fixed and ones that need to be acknowledged.

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INTRODUCTION

- A visit goes through various statuses as it occurs and information is received and updated.

In Process	Incomplete	Verified	Approved	Processed
Visit is in process	Visit has taken place but has exceptions. Additional information is needed to be verified.	There are no exceptions for the visit and it is pending your approval.	Visit is ready to be exported for payroll.	Visit was processed by daily payroll export.

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