

# 2025 NEW EVV FULL SANDATA GUIDE

## Part 1: Sandata Training for DODD Initial Independent Provider Certification Application

## Part 2: Sandata Set-Up After Independent Provider Certification Approval

## Part 3: Sandata Mobile Connect Use

## Part 4: Sandata Manual Entries and Editing EVV Visit Data

**Note:** The ONLY DD services that require EVV are: Homemaker/Personal Care (HPC), Residential Respite, Waiver Nursing Delegation Assessment- RN, Waiver Nursing Service- LPN, Waiver Nursing Service- RN, and Participant Directed Homemaker Personal Care (PDHPC). If you do not select one of these services to have on your DODD Independent Provider certification application, you will NOT have to complete the training and setup for EVV/Sandata.

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**PART 1:**  
**Sandata Training for DODD Initial Independent Provider  
Certification Application**

**1. COMPLETE EVV/SANDATA TRAINING**

1. Create a Sandata Training Account here: [Sandata Learn](#)
2. Input your name, email address, and password, then select “Sign UP”
3. Then fill out the following fields:
  - a. Agency Name: Enter Your Name Here
  - b. Agency ID Number: SKIP
  - c. Medicaid ID#: Put 7 #9’s (ex. 9999999)
  - d. Provider ID#: Put 7 9’s (ex. 9999999)
  - e. Role: Agency Admin/Manager
  - f. State: Ohio
  - g. Agency EVV: SKIP
  - h. Select Non-Agency EVV
  - i. Alt EVV Aggregator: SKIP
4. Select SUBMIT
5. You will then be taken to the Sandata Dashboard. There should be a training named: ODM Independent Provider Course- New.
  - a. Note#1: This is the ONLY course you need to complete
  - b. Note#2: If you do not see this course available, refresh your screen by clicking other tabs on the page and then returning to the Dashboard. If you still don’t see it, you will need to call Sandata at 855-805-3505 to get them to help.
6. Select “View” and then select “Start Course”
7. Once completed, you will receive your certification. Save to upload to your application later.
  - a. Or, get your transcript.
    - i. Go to top right corner of page where there is a golden-brown medallion. Select it.
    - ii. Select “Profile Settings”
    - iii. Select “Transcript”
    - iv. Select “View” under the course heading
    - v. Select “View” under the Certificate heading
    - vi. Print or download transcript

**STOP HERE!**

**THE REST TO BE COMPLETED AFTER DODD  
INDEPENDENT PROVIDER APPROVAL**

**PART 2:**

**Sandata Set-Up After Independent Provider Certification  
Approval**

**2. GET MEDICAID NUMBER AND UPLOAD EVV TRAINING  
CERTIFICATION TO PNM**

8. Go to PNM with this link:

[https://ohpnm.omes.maximus.com/OH\\_PNM\\_PROD/Account/Login.aspx?ReturnUrl=%2FOH\\_PNM\\_PROD%2FDefault.aspx](https://ohpnm.omes.maximus.com/OH_PNM_PROD/Account/Login.aspx?ReturnUrl=%2FOH_PNM_PROD%2FDefault.aspx)

- a. Sign in with your OHID credentials
- b. *Complete the 2-step authentication process if required*
- c. Select the checkbox that you read the agreement
- d. Select your Reg ID
- e. Look for your **Medicaid ID Number**, which is the second box, in between your Name and Effective Date sections.
  - i. Save this number in a safe spot
  - ii. You can also find your DODD Contract Number and Certification Begin and End Dates here.
    1. Save this information in a safe spot if you haven't already
  - iii. Note: Revalidation is automatically updated when you renew your DODD certification every 3 years, so no need to remember or write down the revalidation date.
- f. Go down to the middle section named 'MANAGE APPLICATION'.
  - i. Find 'ENROLLMENT ACTIONS' and then choose the plus sign next to 'ENROLLMENT ACTION SELECTIONS'
  - ii. Select 'BEGIN (or CONTINUE) **ODM** REGISTRATION'
    1. ODM, not DODD!

- g. A pop up will appear saying you will have 10 days to submit the update. Select OK.
- h. In the middle section of the page, you will see the title 'MOST COMMON UPDATES'
- i. Select 'Update' next to 'Required Documents'
- j. Scroll down until you see the header 'EVV Training'
- k. Select 'Browse'. Find your EVV Training file on your computer. Select 'Open'
- l. File will automatically upload to the page.
- m. Choose 'SAVE'. It is located at the bottom and top of the page.
- n. Go up to the top, under the circle/icon blue menu, and find 'Submit for Review'
  - i. Note: If there are other missing required documents on this page, it will not give you the option to "Submit for Review" unless you upload all of them. Once you upload all of them, then you will see the "Submit for Review" button.
- o. Select 'Submit for Review'
- p. Review can take multiple weeks to complete. In the meantime, complete the rest of the steps.

### **3. REGISTER WITH SANDATA EVV**

- 9. Register Provider information with Sandata here: [Sandata EVV Registration Portal](#)
  - a. *This link [EVV Provider Self-Registration Portal – Sandata Technologies](#) will provide additional step-by-step instructions for you once you get to part G below.*
  - b. Select 'REGISTER AS A PROVIDER'
  - c. Select 'OHIO DEPARTMENT OF MEDICAID' as the EVV PROGRAM
  - d. Type in your Provider MEDICAID number
    - i. Note: This is NOT your DODD Contract Number. If you do not have it, you can find it on PNM.
      - 1. Go to PNM here:  
[https://ohpnm.omes.maximus.com/OH\\_PNM\\_PROD/Account/Login.aspx?ReturnUrl=%2FOH\\_PNM\\_PROD%2FDefault.aspx](https://ohpnm.omes.maximus.com/OH_PNM_PROD/Account/Login.aspx?ReturnUrl=%2FOH_PNM_PROD%2FDefault.aspx)
      - 2. *You may be asked to Sign in with your OHID credentials*
      - 3. *You may need to complete the 2-step authentication*
      - 4. Select the checkbox that you read the agreement
      - 5. Select your Reg ID
  - e. Type in your Social Security Number in the EIN/TIN space
  - f. Select 'REGISTER'

- g. Complete all REQUIRED information. *This is where the link [EVV Provider Self-Registration Portal – Sandata Technologies](#) will be helpful.*
  - i. Be sure to add in how many individuals you may serve. Please note, it is perfectly okay if this number changes over time.

#### **4. REGISTER WITH ETRAC**

- 10. Start here: [eTRAC - Login](#)
- 11. Select 'Register'
- 12. Enter/Re-Enter your Provider Medicaid ID, select that you aren't a robot, and select **'Continue'**
- 13. Complete all required fields
  - a. Note: The Program and your Provider Name (along with your Medicaid Number) will be auto populated. Fill out the rest of the information to complete account registration.
  - b. Put your full name in the **Provider Name** field
  - c. Put **Independent Provider** as your Title
  - d. Write down your password for future use
- 14. Select **'Welcome Kit'** on the menu for documents associated with your EVV Program.
  - a. Download the **'WelcomeKitLetter'**. This document will have your **EVV Account Number** listed on it.
  - b. Download **'Non-Agency-Call Reference Guide'** so you have the information available if you ever need to call-in a visit instead of using the app.

## 5. SETUP SANDATA EVV AGGREGATOR AND EVV WEBPORTAL

15. Start on the “Sandata On-Demand Landing Page”: [Ohio \(OH ODM\) – Sandata Technologies](#)

16. Select ‘Login with OHID’ button in the middle of the page.

- a. Login with your OHID credentials
- b. You may need to complete a 2-step authentication
- c. You will be transferred to the Sandata EVV Aggregator

17. Select your EVV Sandata Account Number

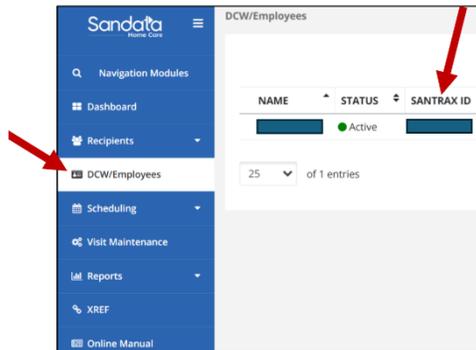
- a. There might be 2 account choices: 10086 and another.
  - i. The EVV Account Number you need is on your eTRAC Welcome Letter

**1. Note: The account you need to select is NOT the 10086 account option.**

- b. Before selecting it, you will notice it says PROVIDER ID next to it. This is your MEDICAID number. Save this number if you haven’t already.
- c. Select it and checkbox “Set as Default Account” and select LOGIN

18. Note your DCW Santrax ID and Account Number

- a. Go to ‘DCW/Employees’ on the left menu
  - i. DCW stands for “Direct Care Worker”. An Independent Provider is considered a DCW to Sandata.
- b. Your record will pull up. Your Santrax ID is in the 3<sup>rd</sup> column. Save this number.



**Note: Before you begin the next steps of this section, you will need to know what services you will be providing for your individual(s). You also need to know their date of birth, Medicaid number, and home address. You need this information to successfully set-up their Sandata account. This part may need to hold off until the OISP and PAWS are complete.**

## 19. Add Recipient/Client

- a. Go to 'Recipient' and then 'Recipient Management' on the left menu
- b. Select 'Create Recipient'
- c. ONLY Enter in Recipient (your individual) Medicaid Number, Birth Date, and DD or PDHPC as the Program
  - i. DD Program is for Homemaker Personal Care, Residential Respite, and Nursing waiver services
  - ii. PD-HPC Program is for Participant Directed Homemaker Personal Care service
    1. Note: PD-HPC uses GT Independence. If GT Independence doesn't sound familiar to you at this point in the process with your individual, then chances are you are not going to provide PD-HPC services.
  - iii. DODD will pop up as the Payer for both options
  - iv. Select 'SEARCH' in middle of box
  - v. If already in the system, which they should be, the recipient's name will be added to the box
  - vi. Select 'Create Recipient'
- d. In this same section, go to the 2<sup>nd</sup> row menu on the top right. Find the Search box. Type in recipient's first name. Select Enter on keyboard or select the magnifying glass
- e. Recipient should pop up.
  - i. Find name and go down the row. **Note the recipient/client's Sandata/Santrax ID in the 5<sup>th</sup> column.** Take note of this number. You will use this number to search in the app for the recipient. It's also needed for the exemption form.
- f. Select name
- g. You will notice 3 tabs 2 rows under the recipient's name. The tabs are labeled: Personal, Program, and Schedules.
- h. You are automatically on the PERSONAL tab.
  - i. Scroll down page to see if there is an address loaded.
  - ii. If not loaded, please add the recipient's address. This is NOT your address.
  - iii. If loaded, skip to next step
- i. Select PROGRAM tab.
  - i. Go down the page and find the section labeled 'SERVICE DETAILS'
  - ii. Select 'ADD SERVICE'

- iii. Select the dropdown box and select the service you will be providing for the recipient.
- iv. Leave start date and do not enter an end date.
- v. Select SAVE
  - 1. If you are to provide another service on that list for this individual, select 'Save and Add Another'.
    - a. Note: This rarely will happen.
- j. Stay on the PROGRAM tab and go to the right side where it says 'Authorization Details'
- k. Select 'ADD AUTHORIZATION'
  - i. It will automatically put in the service you just added. Fill in the required sections only
  - ii. Event Code= None
  - iii. Format= Units
  - iv. Start Date= Leave the date automatically entered in
  - v. End Date= Put in the end date of the current OISP period
    - 1. Note: You will have to enter in a new authorization before the next OISP period begins.
  - vi. Maximum= Leave 0 (0 means unlimited)
  - vii. Select 'SAVE'
- l. Stay on the PROGRAM tab and go to the right side right above where it says 'ADD PAYER'. You will see a drop down box.
  - i. Select 'ACTIVE'
  - ii. A pop-up box will appear. You shouldn't need to add any additional information.
  - iii. Select SAVE
  - iv. A green box will pop up and it will say Success! And it saved successfully.

## 6. IF APPLICABLE, COMPLETE AND SUBMIT EVV EXEMPTION FORM

*Note: If not applicable, skip this section and move on to the next section titled “Setup Sandata Mobile Connect App”. You can only submit this form if you and the individual live in the same household.*

20. Complete exemption form and email it: [EVV Exemption Request Form](#)

- a. Complete ALL fields with an asterisk
- b. Info you need to help you fill it out:
  - i. You are the Provider and DCW (Direct Care Worker). The person you are serving is called the Recipient.
  - ii. Provider 7- digit Medicaid Number: This is your Medicaid number, NOT your DODD number
    1. See #17b above
  - iii. EVV Account Number
    1. See #17a above
  - iv. Select Service
    1. Homemaker/Personal Care (HPC), Residential Respite, Waiver Nursing Delegation Assessment- RN, Waiver Nursing Service- LPN, Waiver Nursing Service- RN, or Participant Directed Homemaker Personal Care (PDHPC)
      - a. More than likely it will be Homemaker/Personal Care (HPC), Residential Respite, or Participant Directed Homemaker Personal Care.
  - v. Select Payor
    1. Whichever service you select, a dropdown menu will appear and it will ask you who the Medicaid Payor is for that service. The answer is always DODD.
  - vi. Answer YES to the 2 questions about if the records are in the Sandata system
  - vii. DCW Santrax ID
    1. See #18b above
  - viii. Recipient Santrax ID
    1. See #19e
- c. When all fields are complete, select SUBMIT
- d. **Note: You must use the Sandata app to document all of your shifts until you obtain your exemption approval**
  - i. *Continue with the following steps to remain compliant while you await your exemption approval.*

## **7. SETUP SANDATA MOBILE CONNECT APP**

21. Install the Sandata Mobile Connect app through Play Store or Apple Store on your phone or tablet
22. Once downloaded, ONLY enter in your FULL EMAIL ADDRESS and select “RESET PASSWORD”
23. You may be asked to enter your email again.
24. Follow instructions via email to reset your password
  - a. Check spam/junk folder for email if you do not receive it in your inbox
25. Once password is changed, go back to the log-in screen on the app and enter in your full email address and new password

**STOP HERE UNTIL YOU BEGIN PROVIDING SERVICES**

### **PART 3:**

### **Sandata Mobile Connect Use**

## **8. USE SANDATA MOBILE CONNECT APP**

26. Use Sandata app to start and end each visit for EVERY SHIFT (VISIT) when you provide an EVV service
27. At the beginning of your shift (visit):
  - a. Search for recipient via Medicaid or Santrax ID number
  - b. Select “Start Visit” and answer any questions
28. At the end of your shift (visit):
  - a. Search for recipient via Medicaid or Santrax ID number if you do not see the open visit listed.
  - b. Select “End Visit” and answer any questions
29. Provider Pro Tip: Use the start and end times entered in Sandata to bill your claims in eMBS
30. If you encounter errors with the app or it isn’t working correctly, uninstall the app and then install it again before contacting Sandata. If that doesn’t work, you should look at the Sandata EVV Aggregator WebPortal to see if you missed any ‘End Visits’.

You can manually fix it in there. See instructions on pages 14 and 15 of this instructional guide.

## 9. SUBMIT CLAIMS TO EMBS

31. Before submitting claims to eMBS, review the Sandata EVV Aggregator WebPortal to double check the number of units you should bill for each visit.

- a. Start Here: [Ohio \(OH ODM\) – Sandata Technologies](#)
- b. Select 'Login with OHID' button in the middle of the page.
  - i. Login with your OHID credentials
  - ii. You may need to complete a 2-step authentication
  - iii. You will be transferred to the Sandata EVV Aggregator
- c. Select your EVV Sandata Account Number and Select 'LOGIN'
- d. Select 'VISIT MAINTENANCE' on the left, blue menu
  - i. Find and Select 'FILTERS' on the top, right side
  - ii. Change the dates for the dates you want to view
    1. Do not enter information or select any other fields
  - iii. Scroll down and select 'APPLY FILTERS'
  - iv. You will now see all the visits you have entered during that time frame for all the individuals you served
  - v. Go across each row and you will see '**Units**' in the 2<sup>nd</sup> to last column
    1. Sandata has converted the time entered into billable 15-minute units.
    2. Be sure this is the number of units you enter on your service documentation form and submit to eMBS.
  - vi. While here, be sure you only see GREEN dots under the SERVICE column
    1. If you do not, this means the service isn't authorized. You will need to go to 'Recipient Management' and add an authorization.

32. Submit claims to eMBS

- a. The billing cycle will compare the claim information you entered against the information entered in Sandata. If there are any discrepancies, you will receive errors and/or denials

33. Check eMBS reports if you receive any denials. Email Colleen if you have issues with billing and she will try to help troubleshoot.

## **STOP HERE!**

**The rest of the document is an extra resource. It includes instructions on completing manual visit entries in the Sandata Aggregator/Webportal and editing EVV data in the Sandata Aggregator/Webportal.**

### **PART 4:**

## **Sandata Manual Entries and Editing EVV Visit Data**

### **10. MANUAL VISIT ENTRY IN SANDATA EVV AGGREGATOR/WEBPORTAL**

34. Start Here: [Ohio \(OH ODM\) – Sandata Technologies](#)
35. Select 'Login with OHID' button in the middle of the page.
  - b. Login with your OHID credentials
  - c. You may need to complete a 2-step authentication
  - d. You will be transferred to the Sandata EVV Aggregator
36. Select your EVV Sandata Account Number and Select 'LOGIN'
37. Select 'VISIT MAINTENANCE' on the left, blue menu
38. Select 'CREATE VISIT'
39. Find individual on the list provided.
  - a. Move down the row and select the 'ACTIONS' button
  - b. Select NEXT at the bottom of the screen
40. Your provider account will automatically be selected
  - a. Select NEXT at the bottom of the screen
41. Complete all required sections
42. Select either "ADD" or "SAVE & ADD ANOTHER"
43. There may be a 'SAVE' button at the bottom of the page. If so, select that.
  - a. Make a note on your service documentation sheet that you had to manually add visit in the Sandata WebPortal.
44. Repeat process until all your visits are added manually

## 11. UPDATE TIME/DATE ENTRY INFORMATION IN SANDATA

45. Start Here: [Ohio \(OH ODM\) – Sandata Technologies](#)
46. Select 'Login with OHID' button in the middle of the page.
  - e. Login with your OHID credentials
  - f. You may need to complete a 2-step authentication
  - g. You will be transferred to the Sandata EVV Aggregator
47. Select your EVV Sandata Account Number and Select 'LOGIN'
48. Select 'VISIT MAINTENANCE' on the left, blue menu
  - a. Find and Select 'FILTERS' on the top, right side
  - b. Change the dates for the dates you want to view
    - i. Do not enter information or select any other fields
  - c. Scroll down and select 'APPLY FILTERS'
  - d. You will now see all the visits you have entered during that time frame for all of your individuals
  - e. Find the RED dots. These are the entries you absolutely need to correct. There might be a missing Visit/Time Out.
    - i. Look in the exception section to see what the error is according to Sandata.
    - ii. If you do not see any red dots, then none have an issue.
  - f. Find the visits you need to update.
    1. EX. Let's say you were supposed to clock out at 2pm and you didn't until 5pm. You will need to update the record to reflect the correct time out.
    - ii. Select visit you need to correct by going across the row to the last column titled 'ACTIONS'. Select the pencil
    - iii. You can adjust information in the WHITE boxes only
    - iv. Once you make a change, additional boxes will appear at the bottom of the page. Scroll down to find them. Select the reason code and select 'SAVE'.
      1. Make a note on your service documentation sheet that you had to manually make a change in the Sandata WebPortal.
    - v. Select the 'Back' button within Sandata (not the internet webpage) towards the top of the page next to the VISIT DATE. This will bring you back to your visit list.
    - vi. Repeat until all visits are updated.