Electronic Visit Verification

A Training for Personal Care Workers

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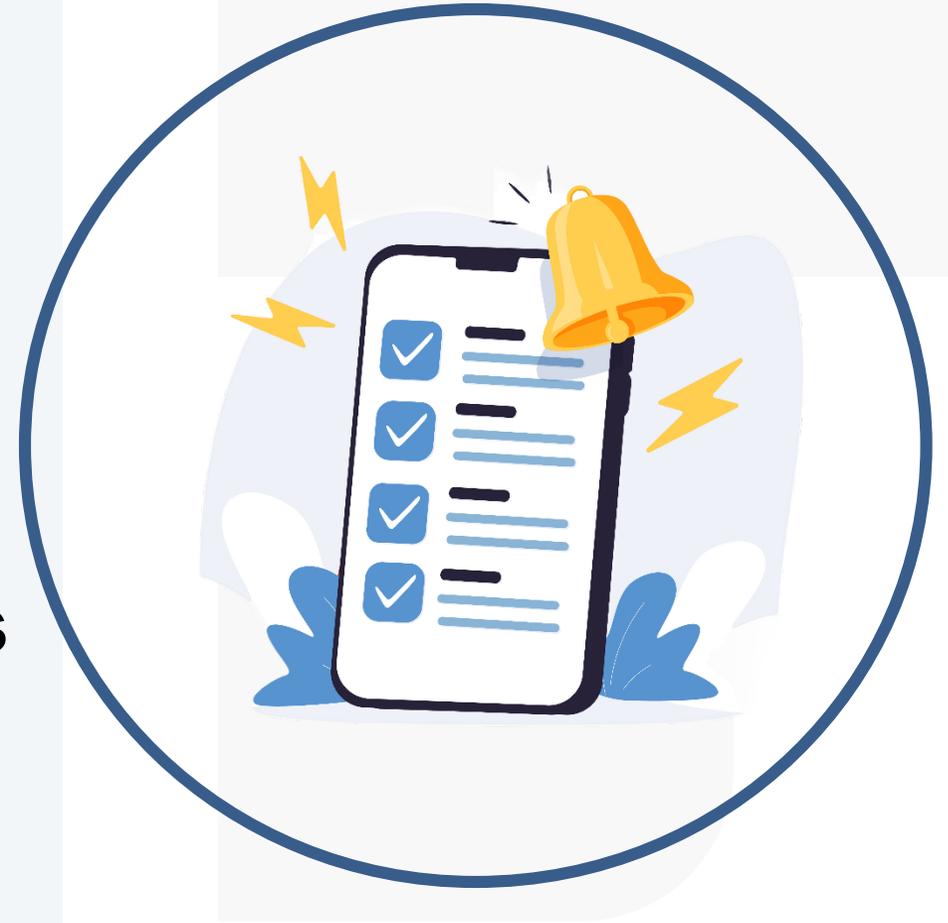
EVV...

•EVV stands for Electronic Visit Verification. It's an electronic system that will track your visits. This system will be used instead of a paper timesheet.

•EVV will collect the following information at each visit:

6 Key Data Points

Who receives services

Who provides services

What service is provided

EVV

Where service is provided

Date Service is Provided

Time in/Time Out

Approved travel time is already accounted for.

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Why do we need to do EVV?

Independence First implemented EVV to be in compliance with State and Federal regulations. **EVV start date for the State of Wisconsin: May 1, 2023.**

On November 2, 2020 the Wisconsin Department of Health Services (DHS) began **requiring** Electronic Visit Verification for Medicaid-covered personal care and supportive home care services.

What company is Independence First using for EVV?

Independence First is using an online platform called Sandata to comply with Federal and State EVV requirements.

Then what happens?
- Once consumer visit information is entered into Sandata, Sandata sends that information to the State and the State reviews and verifies the information to make sure Independence First is in compliance with EVV.

- The information gathered by Sandata also allows Independence First to complete timely billing and payroll functions.
  - Any non-compliance with EVV may impact timely payroll.

How Do I Clock In and Out with EVV?

There are (2) two ways to clock in and out with Sandata:

1 An app that can be installed on the PCW or consumer's smart phone or tablet called **Sandata Mobile Connect (SMC)**. This uses GPS/location services and they <u>must be enabled in order to use the app</u>. There is no tracking.

2 A telephone prompt system called **Santrax**, which is accessed through the consumer's phone number on record. This is to verify PCW is with consumer.

Choose the method that works best for you!

If you are in a situation where neither option can be utilized, please contact the EVV Helpline at: 414-226-8381 or email us at: EVVHelp@independencefirst.org for more information.

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Sandata Mobile Connect App

Step-By-Step Guide

**Includes: "Contact Administrator" password lockout instructions.
See page 28 for details.**

Downloading Sandata Mobile Connect

Warning(s): Only users installing Sandata Mobile Connect on a personal device should use the following download instructions.

Download Sandata Mobile Connect from the Google Play Store or Apple's App Store, depending on the users mobile device. Tap the application store icon on the device to launch the store and search for 'Sandata Mobile Connect' to locate and download the application.

Setting Up Your SMC Account

1. Tap the Sandata Mobile Connect icon to launch the application.

2. Enter log-in credentials:
   A. USERNAME: PCW's email address that we have on file.

   B. TEMPORARY PASSWORD: Temporary password will be emailed to the PCW. The email will come from Sandata.

3. Enter username and temporary password. Select your agency from the drop-down menu, if applicable. If you only work for one agency, tapping **Sign In** will log you in without this information.
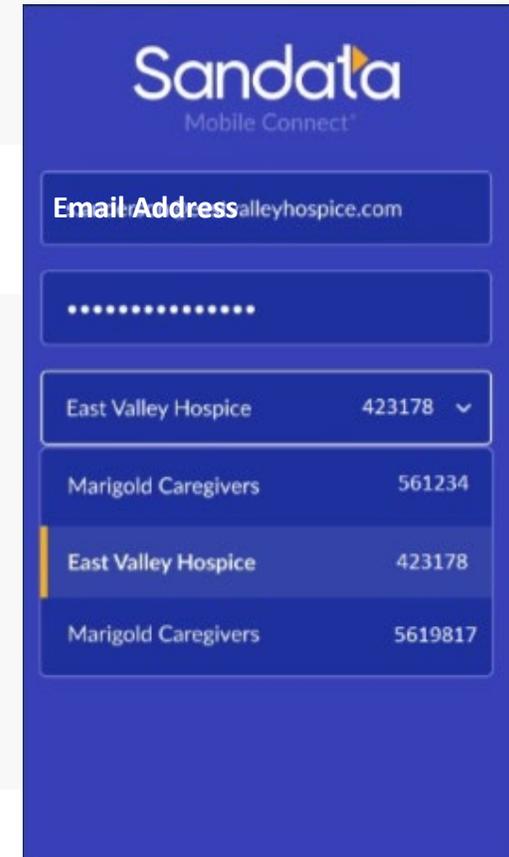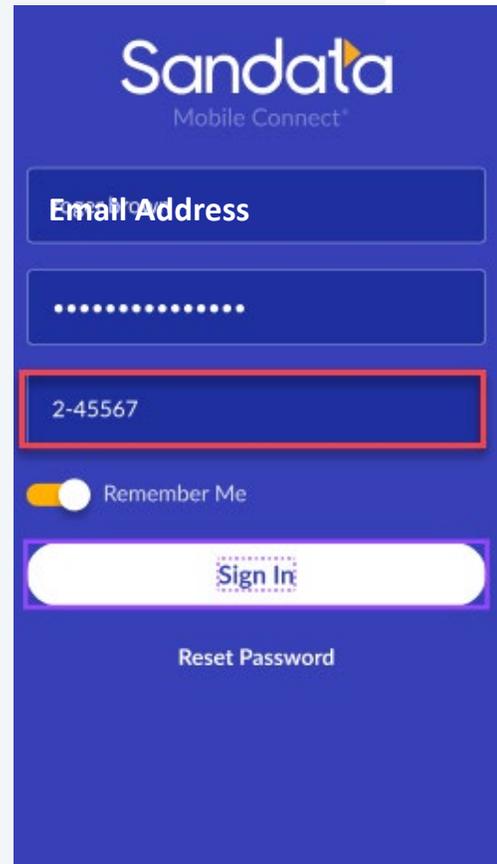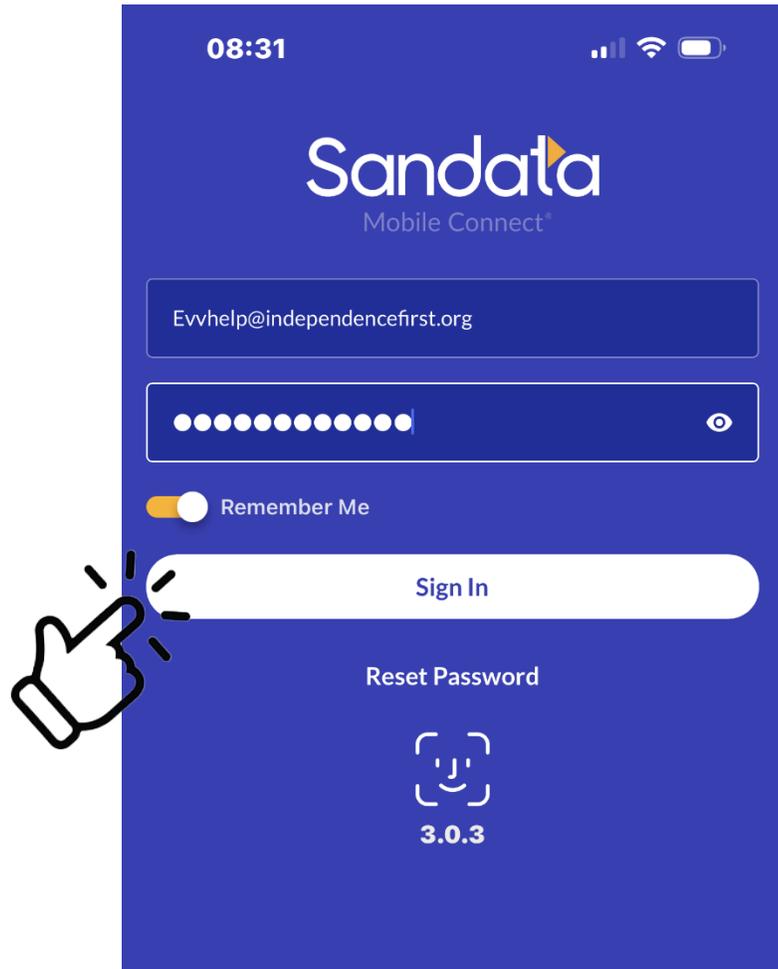
If you have to select an agency, we are:
Independence First 88030

4. Select your preferred language.

5. Set up security questions.

6. Change your temporary password to a password of your choosing. Please note: your new password must meet the following criteria:

    A. 12 or more characters
    B. One upper case letter
    C. One lower case letter
    D. At least one number
    E. At least one special character (i.e. !@#$%&*,.?)

Please note: your new password must be completely different from your username (e-mail address).

Note:
To keep your account safe, you need to change your password regularly, usually every 60 days. When it's time to change your password, messages will start to appear 10 days before the expiration date to let you know how many days you have left. If you do not change your password before it expires, you must follow the steps to reset it.

Change Password

Current password

New password

Confirm new password

Requirements
- 12 or more characters
- Uppercase letter
- Lowercase letter
- Number
- Special character

Continue

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Welcome to the Sandata Mobile Connect App!

PCW's username will always be the email address we have on file →

Type in your password here →

Tap Sign In
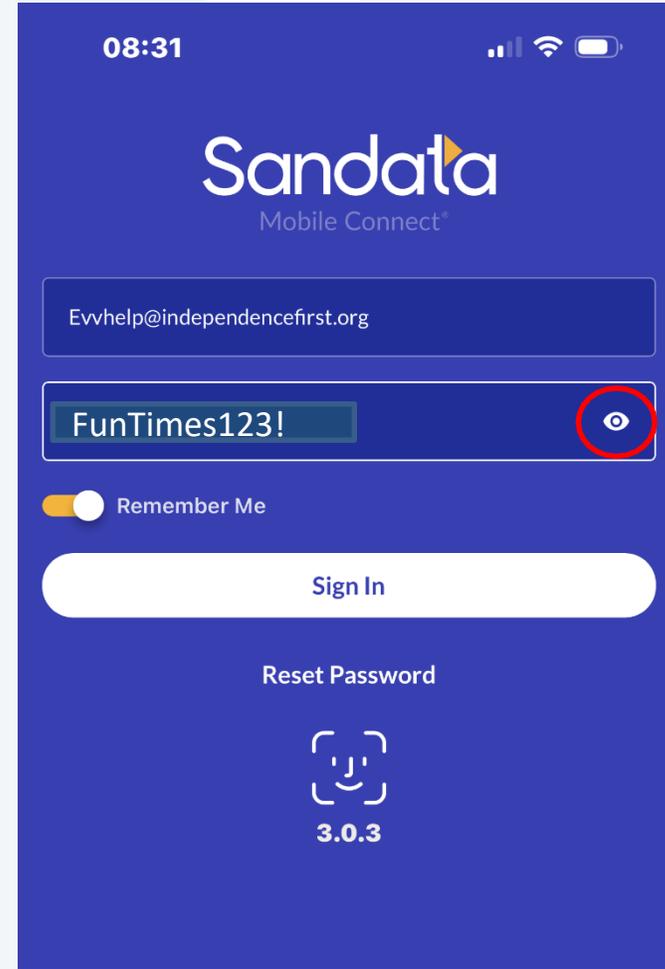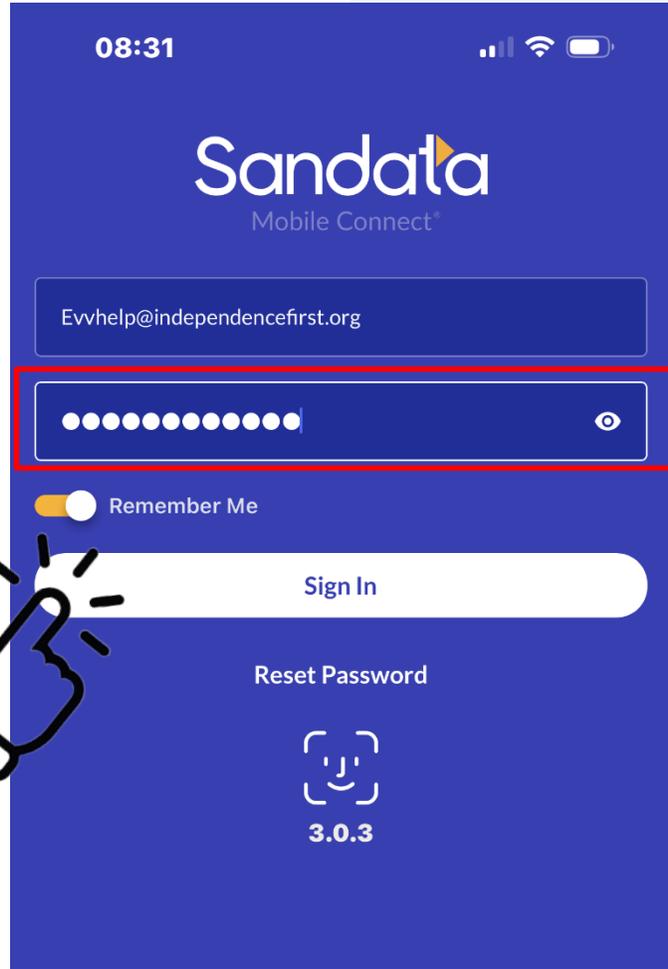
If you would like to see the password you're typing in, tap the eye icon and the dots will disappear

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Face or Fingerprint/Touch Login

This feature is optional if your device allows for it and can be turned off under "Settings" in the app.

Enable Touch ID?

If this is a shared device, we do not recommend enabling Touch ID.

Enable Touch ID

Not Right Now

Enable Face ID?

If this is a shared device, we do not recommend enabling Face ID.

Enable Face ID

Not Right Now

Enable Fingerprint?

If this is a shared device, we do not recommend enabling Fingerprint.

Enable Fingerprint

Not Right Now

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Menu Bar

If you would like to see the past shifts you have worked, tap the **Past** tab.

Once you are logged in successfully, you will see the **Visits** screen. Here, you will see your upcoming scheduled visits.

This screen also shows you all of your consumer information and what day and time you are scheduled to work.

PC AM = Personal Care in the morning

PC M = Personal Care in the afternoon

PC PM = Personal Care in the evening

08:29

Visits

UPCOMING   PAST

Today   Wed, Aug 2

IF Consumer   08:00 AM
PC AM
501 S. First St. , Milwaukee WI 53204

IF Consumer   02:00 PM
PC PM
501 S. First St. , Milwaukee WI 53204

Tomorrow   Thu, Aug 3

IF Consumer   08:00 AM
PC AM
501 S. First St. , Milwaukee WI 53204

IF Consumer   02:00 PM
PC PM
501 S. First St. , Milwaukee WI 53204

Friday   Aug 4

IF Consumer   08:00 AM
PC AM
501 S. First St. , Milwaukee WI 53204

IF Consumer   02:00 PM
PC PM
501 S. First St. , Milwaukee WI 53204

SERVICES

ATT	Attendant Care
HMK	Homemaker
LI	Live In
PC	Personal Care
PRN	PRN

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CLOCKING IN

Under **Today**, tap the correct shift.
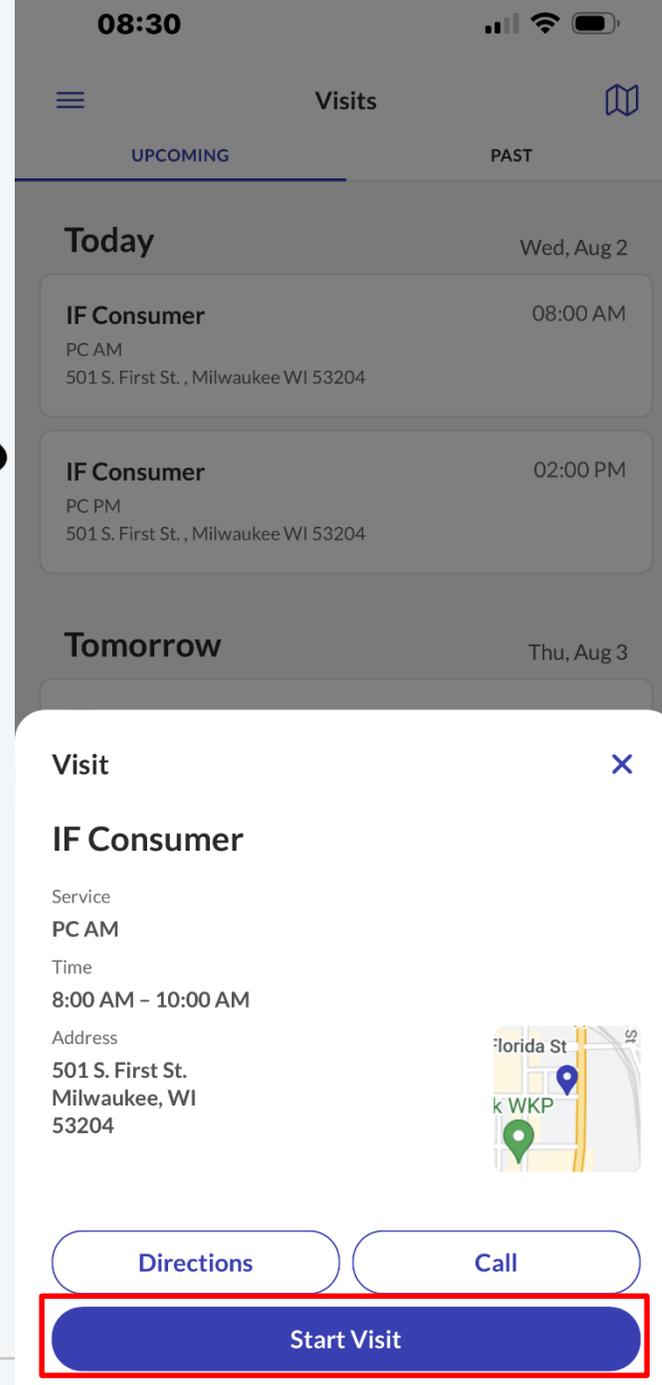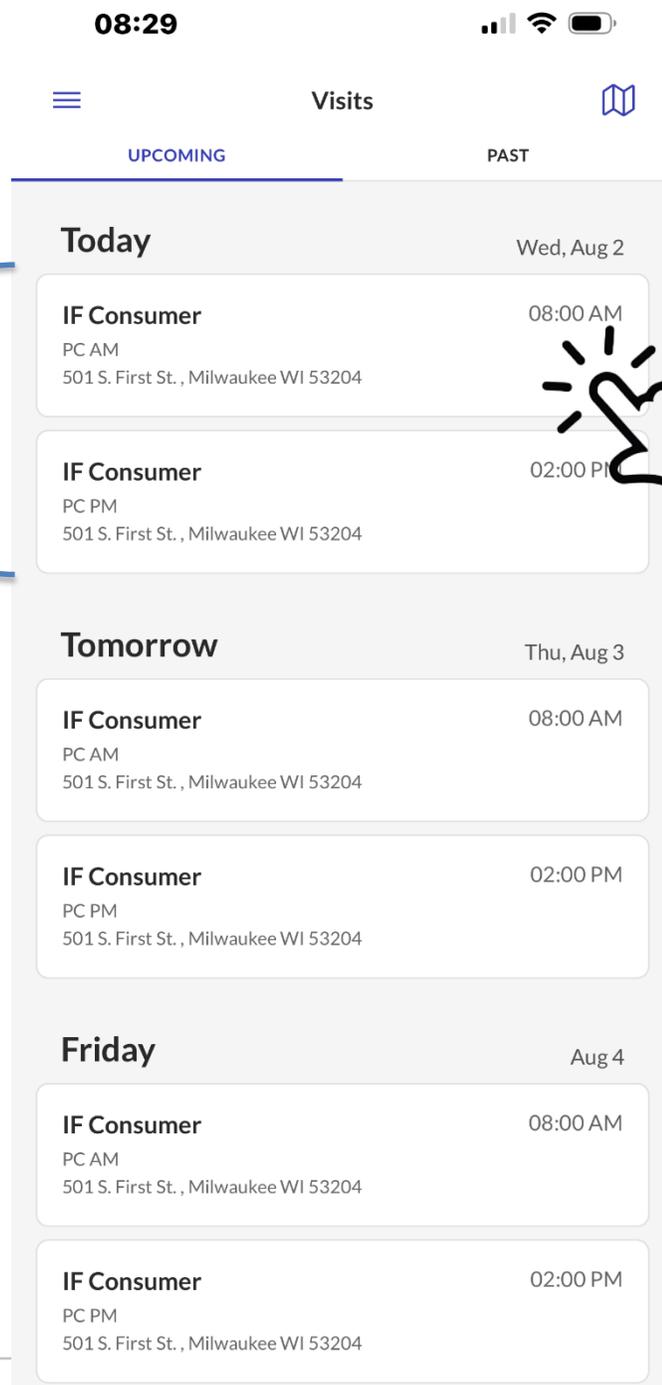
Next, Tap **Start Visit**

Next, tap on **Home.**

**No need to select Community.
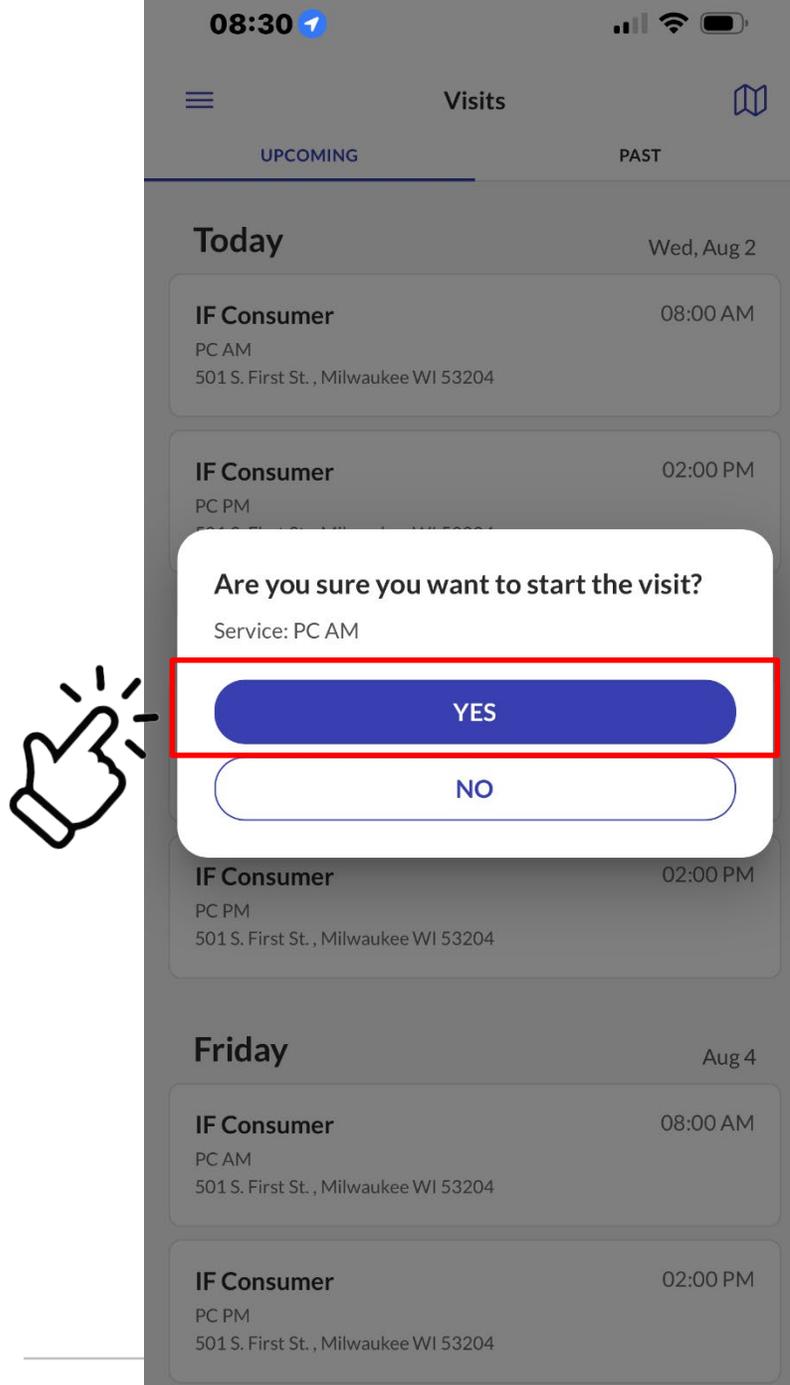
Are you sure you want to start the visit?

Tap **YES** and then **SIGN OUT or CLOSE THE APP** when the next screen appears.

The "Visit In Progress" is part of the **clock out** process.

Additionally, there is no need to stay signed into the app while you are working.
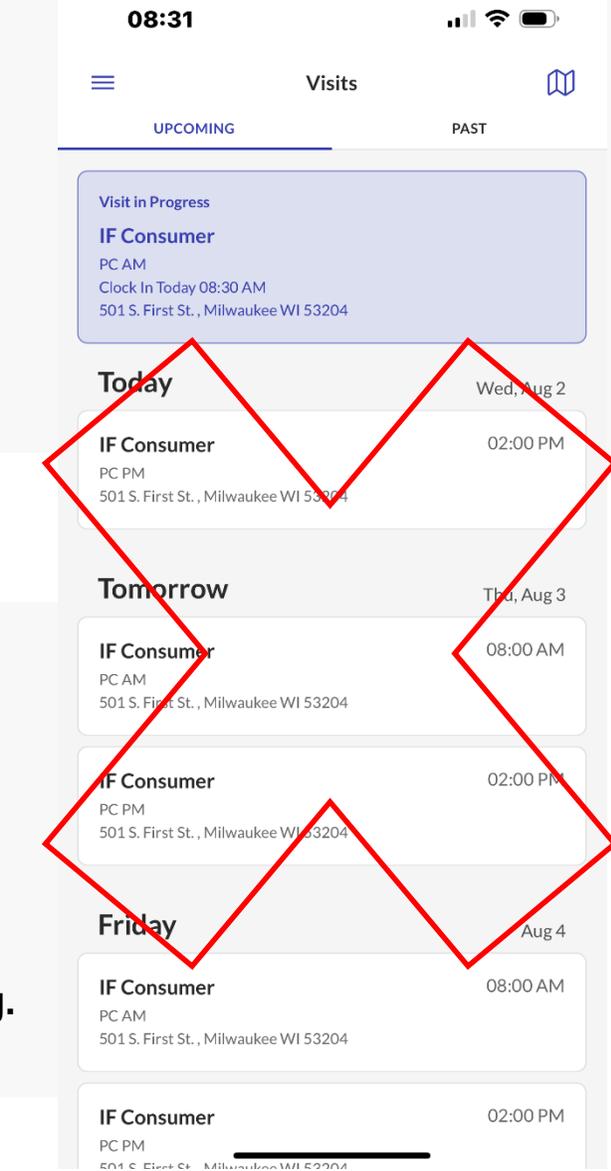
CLOCKING OUT

Log back into the app when you are done working and you will see the **Visits** screen with "Visit in Progress" displayed. It will display all the **updated** details of your current consumer visit.
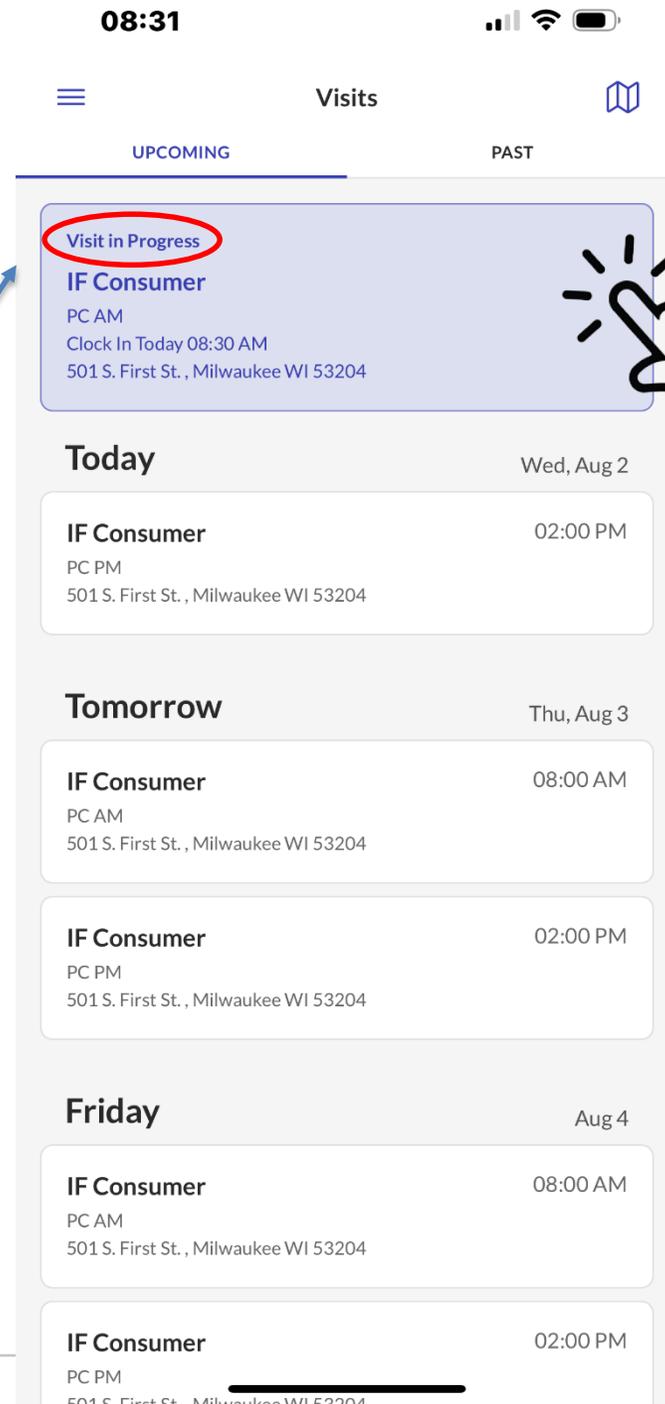
Step 1: Tap the highlighted shift to resume the visit.

Completing a Visit with Tasks

Step 2: Visit notes. If you have any visit notes you'd like to document, tap in the box, and record your note.

This indicates the days of the week the task is required.

Step 3: Tap on **TASKS**. For each task with a red asterisk (star)**,** you **MUST** select either:
- **Task Completed**,
- **Client Refused**, or
- **Task Not Completed**.

Step 4: Once all the required tasks are selected, and you've documented any visit notes (if applicable), tap **Complete Visit**.

Visit in Progress

IF Consumer

Service
PC AM

Clock In
08:30 AM

TASKS | NOTES

Bathing * Clear
⦿ Task Completed
◯ Client Refused
◯ Task Not Completed
SU M TU W TH F SA

Dressing Undressing * Clear

Visit Summary ✕

IF Consumer

Date
Wednesday, August 2, 2023

Service
PC AM

Clock In   Clock Out
8:30 AM   **8:32 AM**

Notes
Test
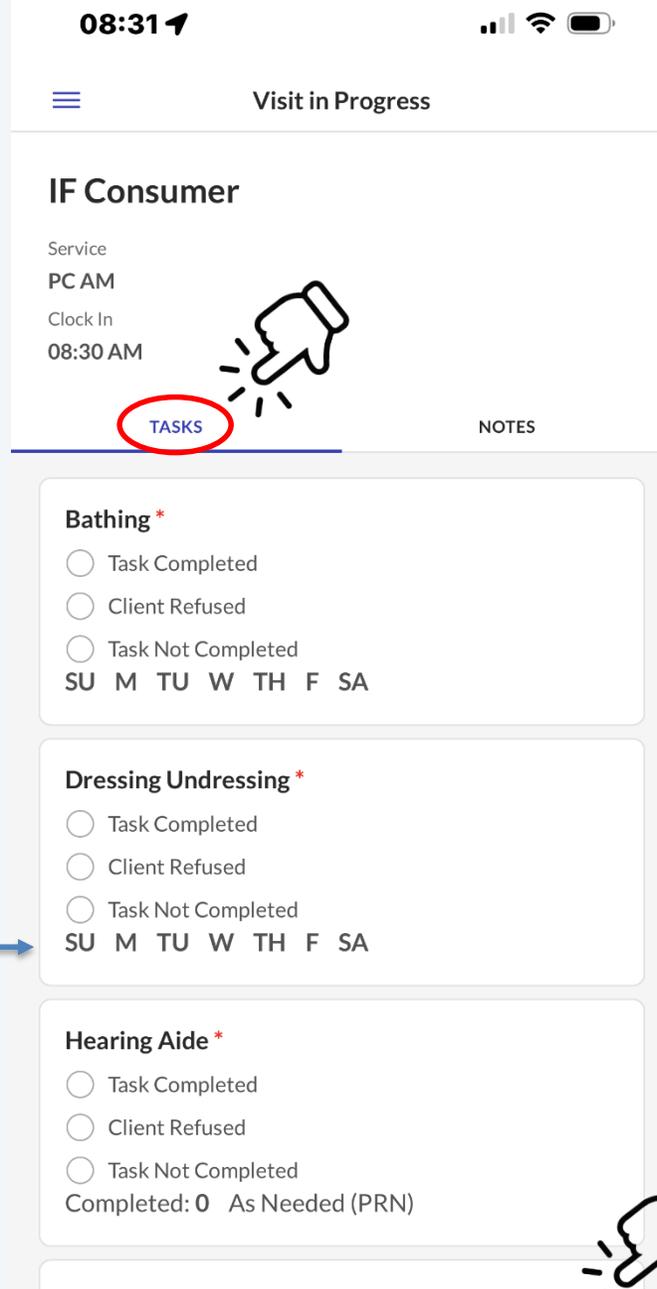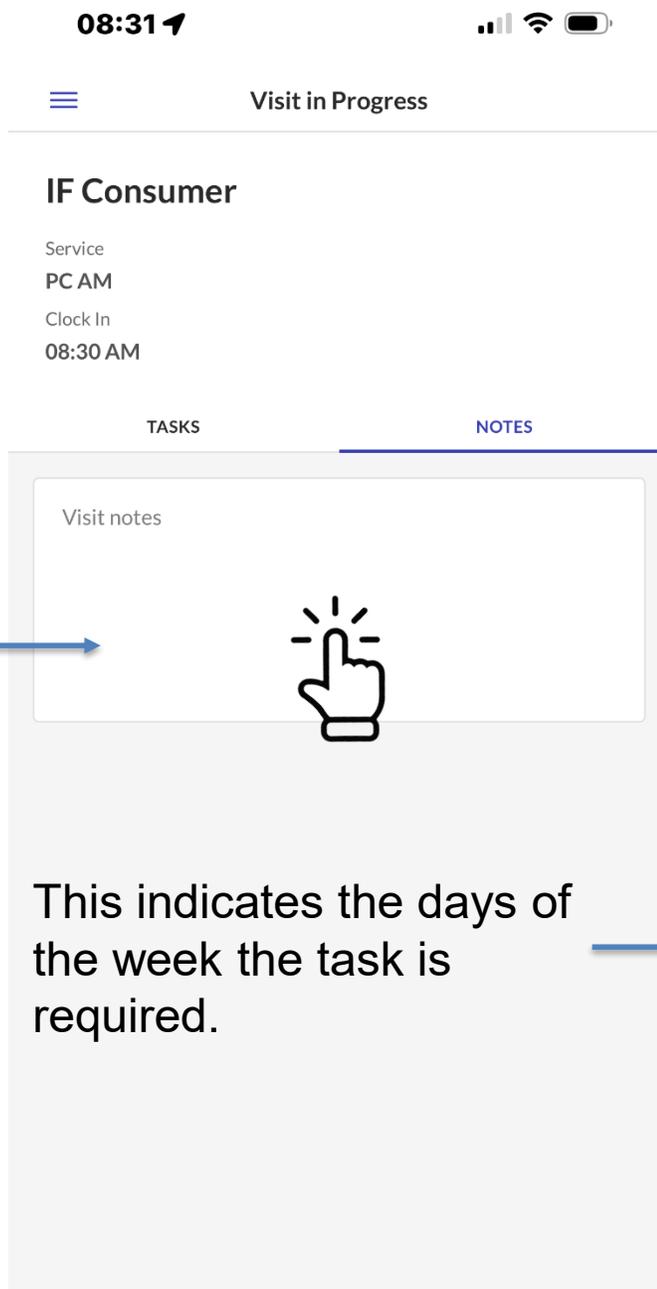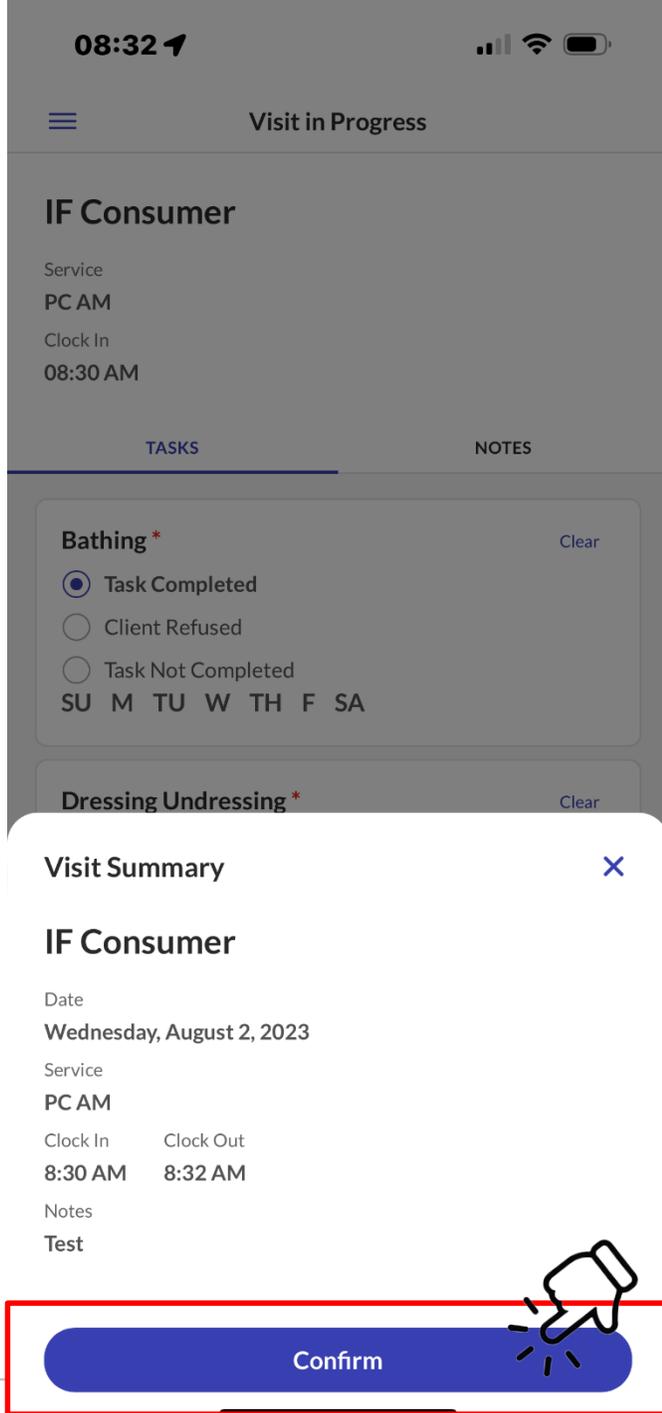
Confirm

Step 5: Review the information and tap **Confirm.**

Client Verification

Please hand the device to the client so they can verify this visit.

Skip
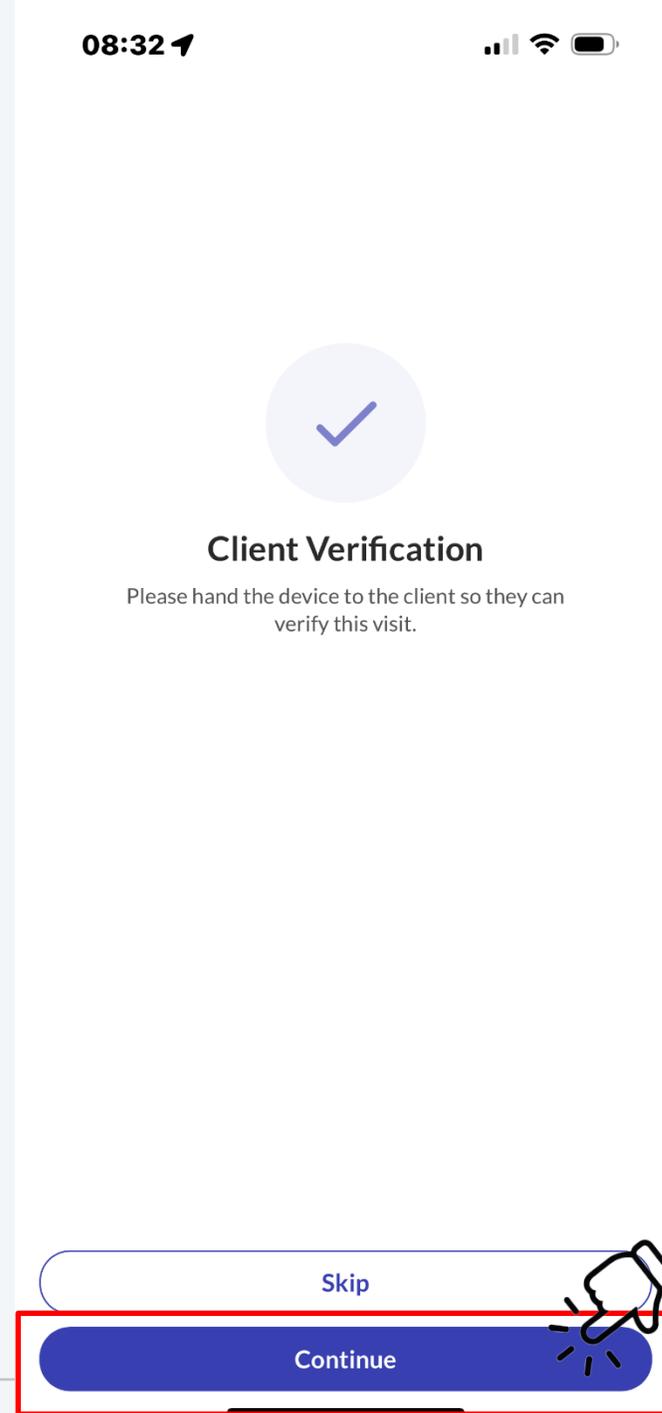
Continue

CLIENT VERIFICATION

This validation is the client signing off on your digital timesheet.

If the client cannot verify the shift, see your RNCC.

Step 6: Tap **Continue.**

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Next, tap on **Home.**

**No need to select Community.

VERIFYING THE VISIT

Step 7: Select the appropriate language and tap **Continue**.

08:33

Select Language

Please select your preferred language.

- ⦿ English
- ◯ Español
- ◯ русский
- ◯ العربية المصرية

Continue

08:33

←

Hello, IF

Please verify the details for today's visit.

Services

PC PM

Confirm	Deny

Visit Time

08:32 AM - 08:33 AM

Confirm	Deny
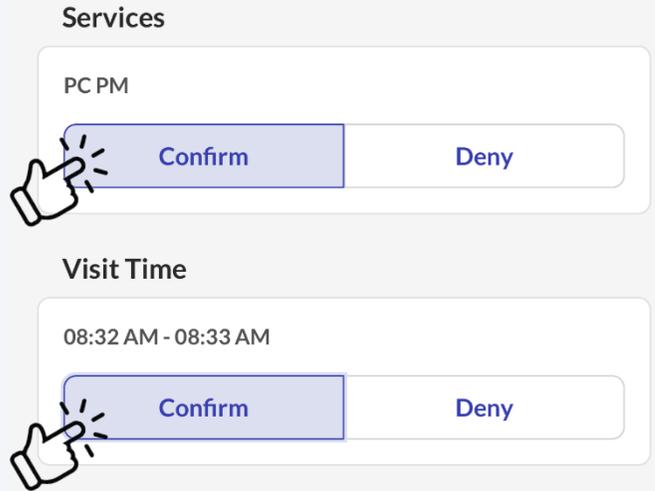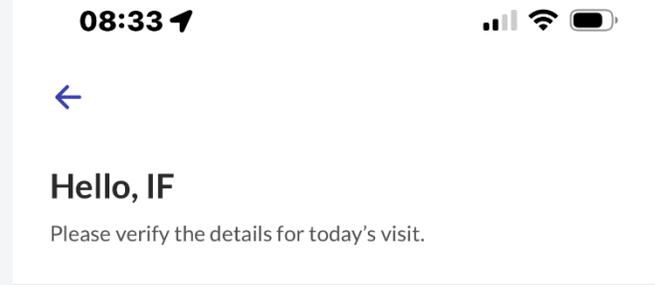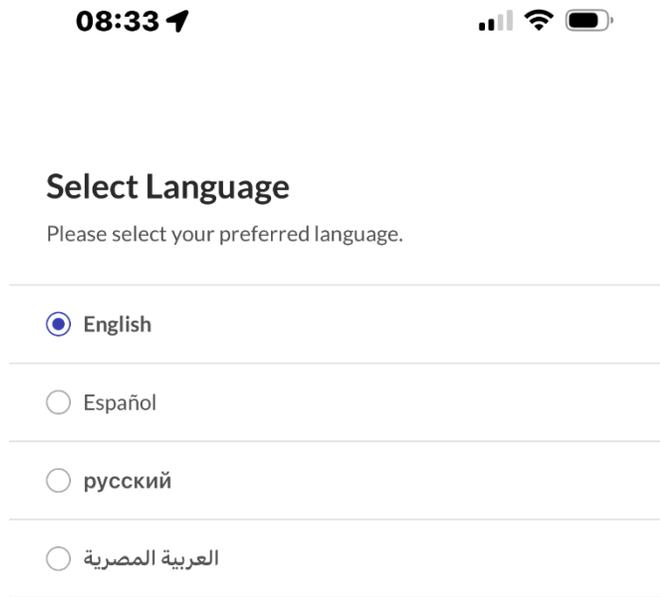
Continue

Step 8: Tap **Confirm** for both the **Services** and the **Visit Time**. The boxes will highlight.

Step 9: Tap **Continue.**

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SIGNATURE OR VOICE RECORDING

Step 10: The consumer can use their finger to sign in the box and it will appear on the screen.

Step 11: Tap **Continue**.

08:34

←

Sign or Record

SIGNATURE   VOICE RECORDING

Use your finger to sign below.

*If a mistake is made, tap **Clear** to start over.

Clear

Continue

OR

08:34

←

Sign or Record

SIGNATURE   **VOICE RECORDING**

Press record and state your name and today's date (August 2, 2023).

Continue
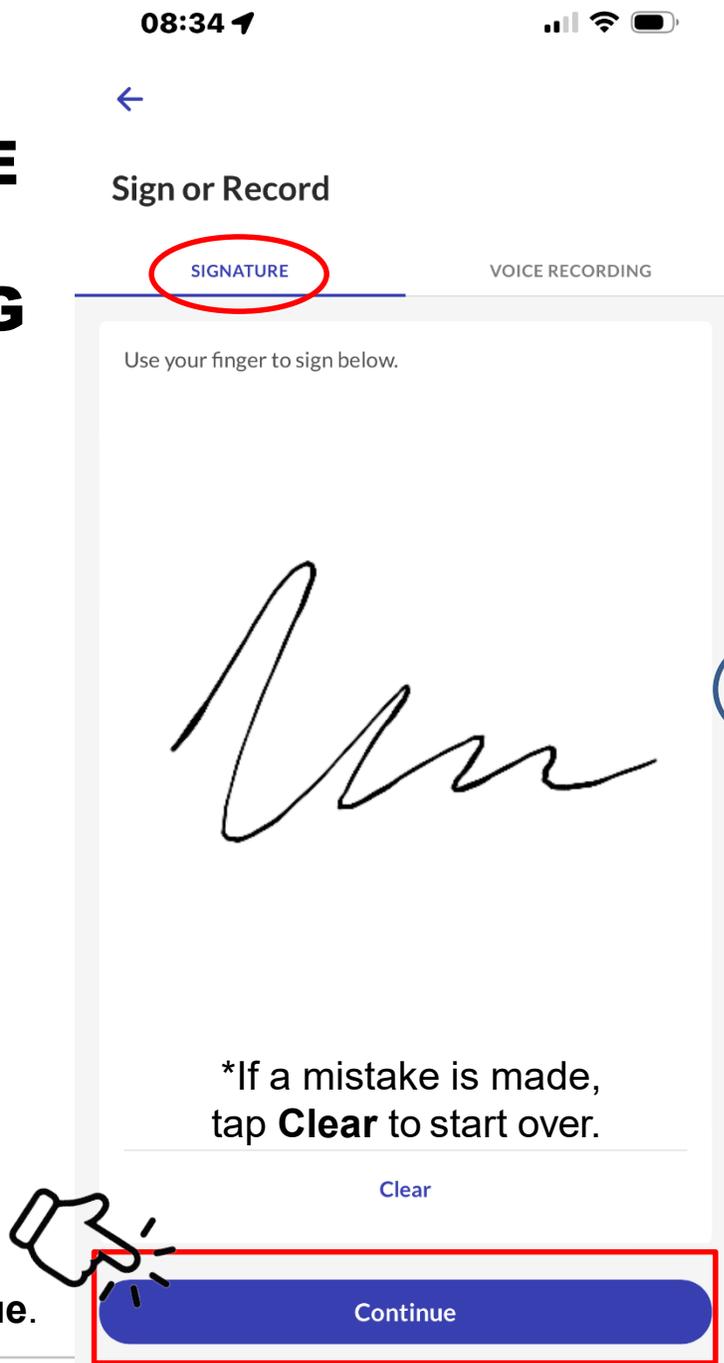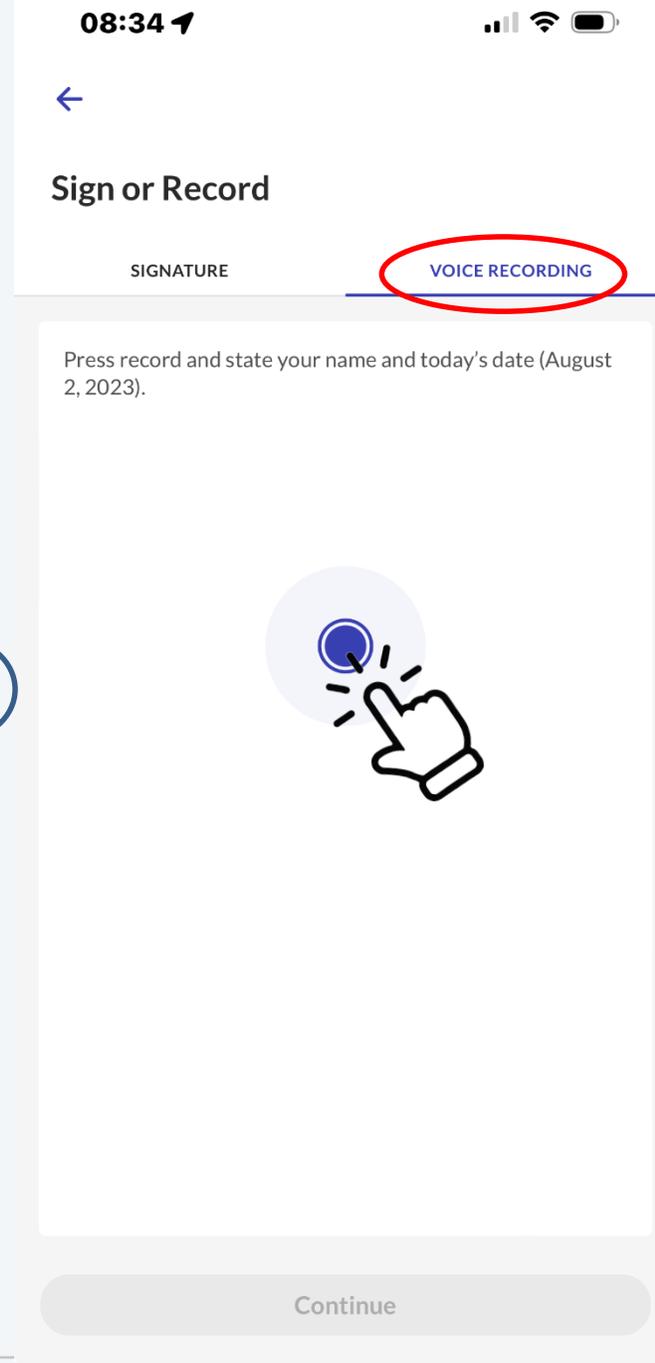
The consumer can record their voice **instead** of signing their name.

Tap **VOICE RECORDING** then press the record button to start recording.

Have the consumer say their name and the date. (the date is displayed automatically)

Once finished, stop the recording and the recording can be played back.

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Your Visit Is Complete!

Step 12: Tap **Done** to clock out and you'll return back to the login screen.

GREAT WORK! The shift details have been submitted successfully.

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Santrax Electronic Visit Verification Call Reference Guide: Independence First

_____

Write your 6 digit Employee ID# above for easy reference.
This is also known as your Santrax ID#.

Need help locating your Santrax ID# or Client's Santrax ID#?
Call our EVV Helpline for assistance (414) 226-8381
or email us at: EVVHelp@independencefirst.org.

Santrax Phone Numbers:
1 (833) 628-1241
OR
1 (844) 940-4775

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CALLING IN INSTRUCTIONS (Clock-In)

1. **Call one of the toll-free numbers:** (*either number calls the same place*)
   1 (833) 628-1241   **OR**
   1 (844) 940-4775

2. **The system will ask you for your preferred language:**
   Press: 1 for English, 2 for Arabic, 3 for Hmong, 4 for Russian,
             5 for Spanish

3. **The system will say, "Please enter your Santrax ID." PCW will enter their 6-digit Santrax ID#. This is your employee ID#. (including the zeros).**

4. **Choose location of service: 1 – Home, 2 – Community, 3 – Replay. Always select 1 – Home.**

5. **The system will say: "Received at (TIME)". Since you are <u>not</u> using Fixed Visit Verification using an FVV device, press the (#) key to continue.**

6. **Press 1 to call in ("clock in")**

7. **The system will say, "Received at (TIME). Please enter first client ID or hang up if done."**

8. **No need to enter the Client ID#. Hang up. You are clocked in!**

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CALLING OUT INSTRUCTIONS (Clock-Out)

1. **Call one of the toll-free numbers: (*either number calls the same place*)**
   1 (833) 628-1241   **OR**
   1 (844) 940-4775

2. **The system will ask you for your preferred language:**
   Press: 1 for English, 2 for Arabic,
   3 for Hmong, 4 for Russian, 5 for Spanish

3. **The system will say, "Please enter your Santrax ID." PCW will enter their 6-digit Santrax ID#. This is your employee ID#. (including the zeros)**

4. **The system will say: "Received at (TIME)". Since you are <u>not</u> using Fixed Visit Verification using an FVV device, press the (#) key to continue.**

5. **Press 2 to call out ("clock out")**

6. **System will say: "Received at (TIME). Please enter first client ID or hang up if done."**
   - Enter Client ID#
   - Enter total number of tasks, when prompted
     *Enter the **TOTAL** number of tasks performed during the shift.

7. **Once you enter in the total number of tasks:**
   - Enter your task codes `one-by-one`. (A complete list of codes are on page 27).

   Once you enter all the codes, the system will confirm the total number of tasks entered.

8. **CLIENT VERIFICATION:**
   a. Press 1 if the client **<u>can</u>** participate in verifying the shift and go to step 10.
   b. Press 2 if the client **<u>cannot</u>** participate in verifying the shift and go to step 11.

   If your consumer is unable to participate in the verbal verification, you will need to contact your RN.

9. **CLIENT PARTICIPATION:**
   - Hand the phone to the client. They are to state their name and today's date when the system asks them to. <u>**DO NOT HANG UP AFTER!**</u> Wait a few seconds.

10. **The system will say, "Please enter second client ID or hang up if done."**

11. **There is no second client ID.**
    You can hang up. You are clocked out.

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CALLING OUT INSTRUCTIONS (Clock-Out)

1. **Call one of the toll-free numbers: (*either number calls the same place*)**

   1 (833) 628-1241   **OR**
   1 (844) 940-4775

2. **The system will ask you for your preferred language:**
   Press: 1 for English, 2 for Arabic,
   3 for Hmong, 4 for Russian, 5 for Spanish

3. **The system will say, "Please enter your Santrax ID." PCW will enter their 6-digit Santrax ID#. This is your employee ID#. (including the zeros)**

4. **Choose location of service: 1 – Home, 2 – Community, 3 – Replay. Always select 1 – Home.**

5. **The system will say: "Received at (TIME)". Since you are <u>not</u> using Fixed Visit Verification using an FVV device, press the (#) key to continue.**

6. **Press 2 to call out ("clock out")**

7. **System will say: "Received at (TIME). Please enter first client ID or hang up if done."**
   - Enter Client ID#
   - Enter total number of tasks, when prompted
     *Enter the **TOTAL** number of tasks performed during the shift.

8. **Once you enter in the total number of tasks:**
   - Enter your task codes `one-by-one`. (A complete list of codes are on page 25).

   Once you enter all the codes, the system will confirm the total number of tasks entered.

9. **CLIENT VERIFICATION:**
   a. Press 1 if the client <u>**can**</u> participate in verifying the shift and go to step 9.
   b. Press 2 if the client <u>**cannot**</u> participate in verifying the shift and go to step 10.

   If your consumer is unable to participate in the verbal verification, you will need to contact your RN.

10. **CLIENT PARTICIPATION:**
    - Hand the phone to the client. They are to state their name and today's date when the system asks them to. **<u>DO NOT HANG UP AFTER!</u>** Wait a few seconds.

11. **The system will say, "Please enter second client ID or hang up if done."**

12. **There is no second client ID. You can hang up. You are clocked out.**

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Task ID #   Task description

Task ID #	Task description
10	Bathing
12	Dressing/Undressing
13	Splints/Braces/TEDs
15	Oral Hygiene
16	Shaving
17	Nail Care
18	Feeding
19	Walking Assistance/ Mobility
20	Toileting
21	Incontinence Care
22	Transfer
24	Meal Prep/Meal Set up
25	Clean/Maintain Equipment
26	Light Housekeeping
27	Laundry
28	Medical Assistance
30	Skin Care
31	Catheter Side care
32	Feeding Tube Side Care
33	Complex Positioning
34	Tube Feeding
35	Respiratory Assistance
36	Bowl Program
37	Wound Care
38	ROM/Therapy Exercise Glucometer
40	Medical oriented task
43	Shampoo - Hair Care
44	Apply Support Hose
45	Brushing/Combing Hair
46	Clean Dentures
49	Eyeglasses
50	Hearing Aide
55	Assistance with bedpan
56	Urinal
57	Assistance with drainage bag
61	Transfer- Medical Lift
62	Application of Lotion/Ointment
63	Transfer Slide Board
64	Grocery Shopping Errands
65	Accompany to Medical Appointment
66	Supervision/ Companionship
67	Catheter Ostomy Hygiene
68	Ostomy Care
69	Assistance with Glucometer
70	Offer Fluids
71	Female Human Reproductive Systems
76	Assist with Oxygen

This is a list of possible caretasks.

The care tasks you perform will be on the Plan of Care document you received from your nurse.

You will need your Client's Santrax ID# if you use the telephone system to clock in and out.

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+/- 3 HOUR CLOCK IN WINDOW

As an agency whose mission is based on consumer independence, we have applied a 3 hour window to allow flexibility in which a worker can clock in 3 hours before or clock in 3 hours after their regularly scheduled shift based on the consumer's request or needs. However, the duration of the care must remain the same. Examples are provided below.

Examples:
Care Plan states a scheduled AM shift from 8am – 10am. (2 hour duration of cares)

APPROVED: A worker can clock in as early as 5am or clock in as delayed as 11am. Length of care must remain at 2 hours. (i.e. 5am - 7am or 11am - 1pm)

NOT APPROVED: A worker who clocks in early at 4:55am or clocks in as delayed as 11:05am and length of care is longer or shorter than 2 hours.

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Who should I contact if I have questions?

Assistance is available via phone or email:

- 414-226-8381 (EVV Helpline)
- EVVHelp@independencefirst.org

Paycheck questions or questions/concerns about clock ins/outs:

- Contact your Payroll & Exceptions Coordinator (PEC).

I forgot my Sandata Mobile Connect password or I got locked out - "Contact Administrator"

- Refer to page 28 for instructions on resetting your password

Reset Password / In-App Unlock (Using Email)

How To Reset Your Sandata Mobile Connect Password –"Contact Administrator"

Sandata
Mobile Connect®

Username

Password 👁

🟠 Remember Me

Sign In

Reset Password

2.1.76
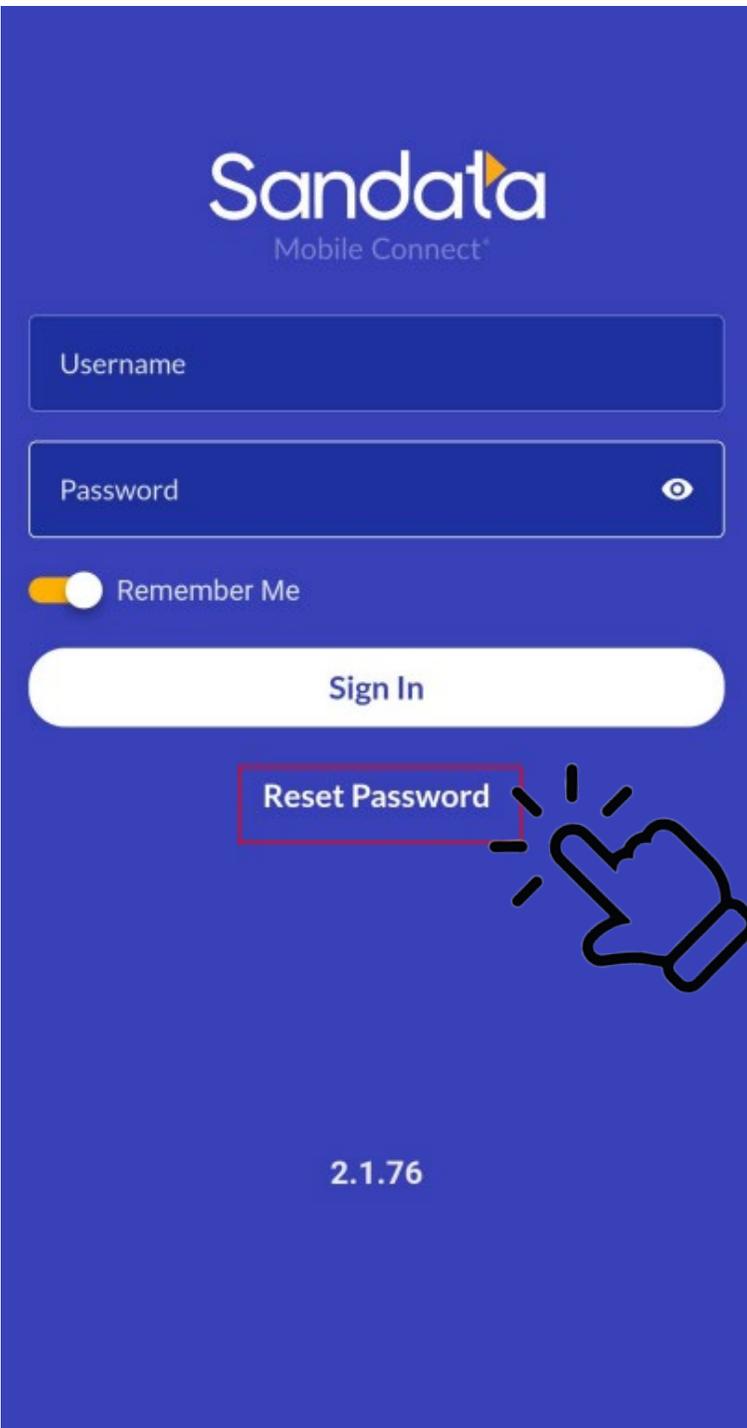
Step ①

Tap **Reset Password**

Reset Password ✕

Enter your username to reset your password.
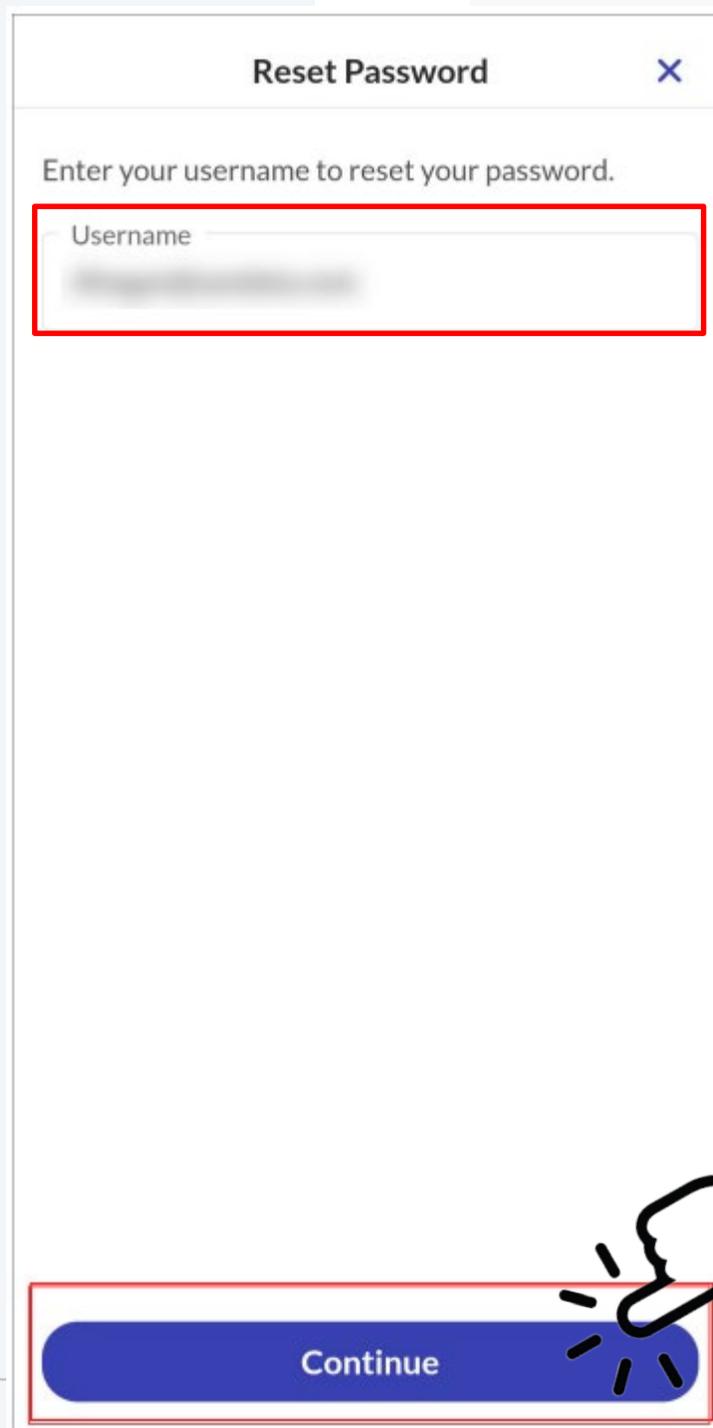
Username

Step ②

Enter your username and tap **Continue**.

Continue

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Reset Password

Enter your username to reset your password.

Username
Ahogan@sandata.com

Reset Password

A link to change your password has been sent to your email and will expire in 30 minutes

Okay

Continue
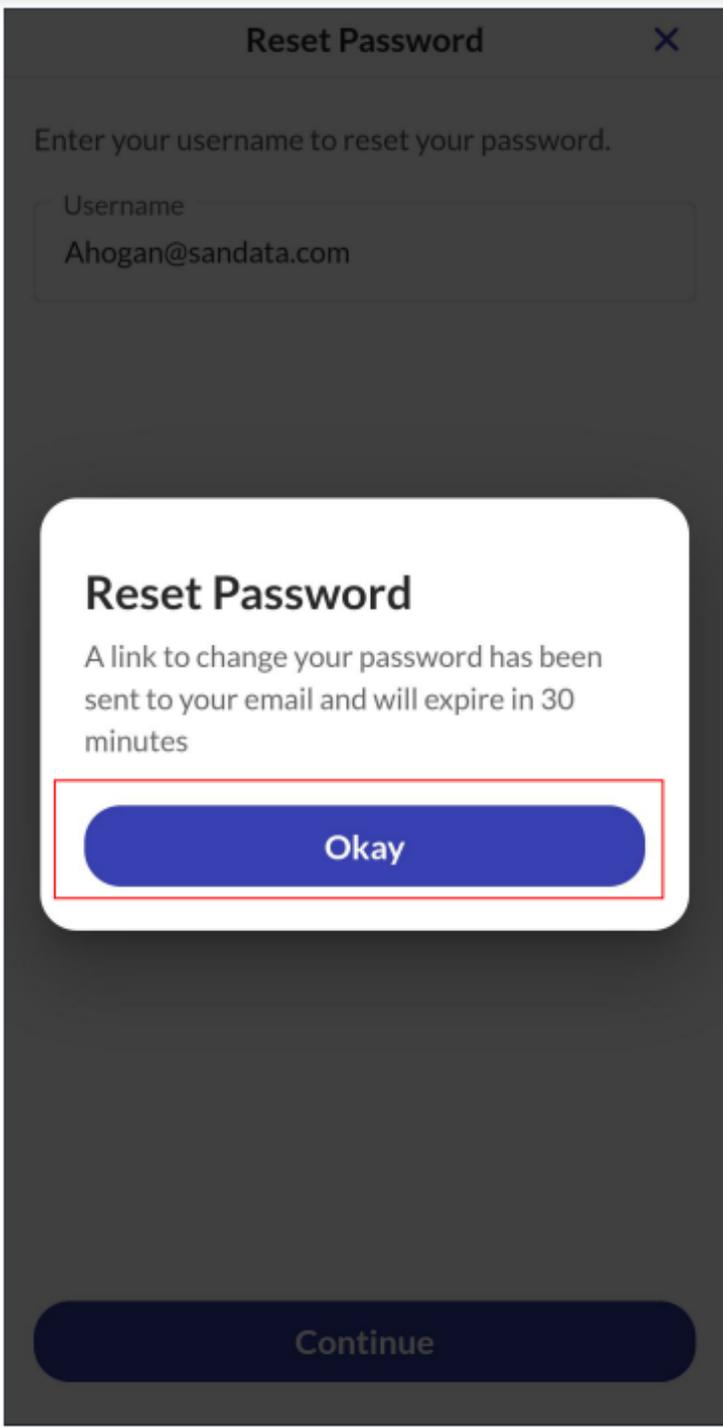
A link to change your password has been sent to your email we have on file.

Step ③

Tap **Okay**.

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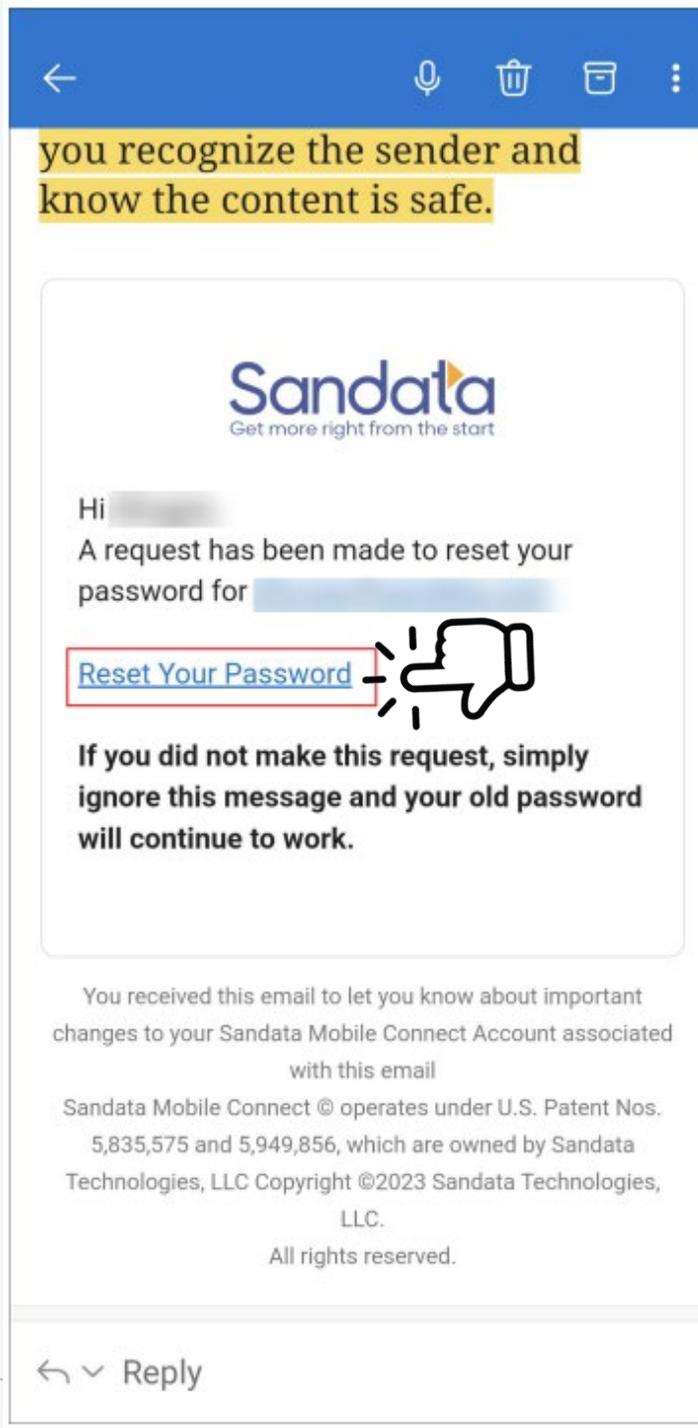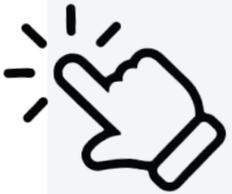
you recognize the sender and know the content is safe.

Sandata
Get more right from the start

Hi

A request has been made to reset your password for

Reset Your Password

If you did not make this request, simply ignore this message and your old password will continue to work.

You received this email to let you know about important changes to your Sandata Mobile Connect Account associated with this email

Sandata Mobile Connect © operates under U.S. Patent Nos. 5,835,575 and 5,949,856, which are owned by Sandata Technologies, LLC Copyright ©2023 Sandata Technologies, LLC.

All rights reserved.

↩ ⌄ Reply

Step ④

Check your email with the subject "Sandata Mobile Connect Reset Password".

Tap Reset Your Password link in the email.

Remember, you **cannot** use old passwords and your new password must meet the following criteria:

    A. 12 or more characters
    B. One upper case letter
    C. One lower case letter
    D. At least one number
    E. At least one special character (i.e. !@#$%&*,.?)

One small change will count as a brand new password!

Example:

Old password: **Sandatarox1!**

New password: **Sandatarox2!**   **OR**   **Sandatarox1$**

That simple change in the number or special character will count as a new password.

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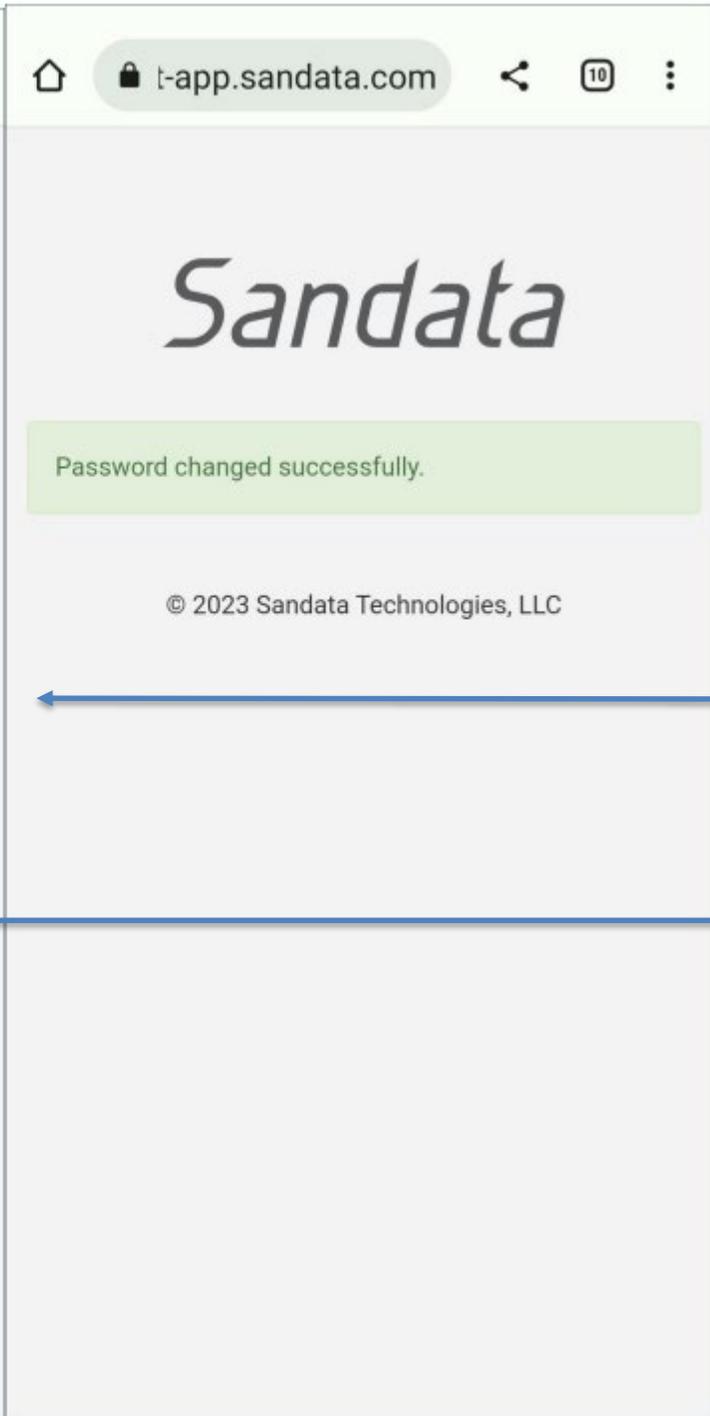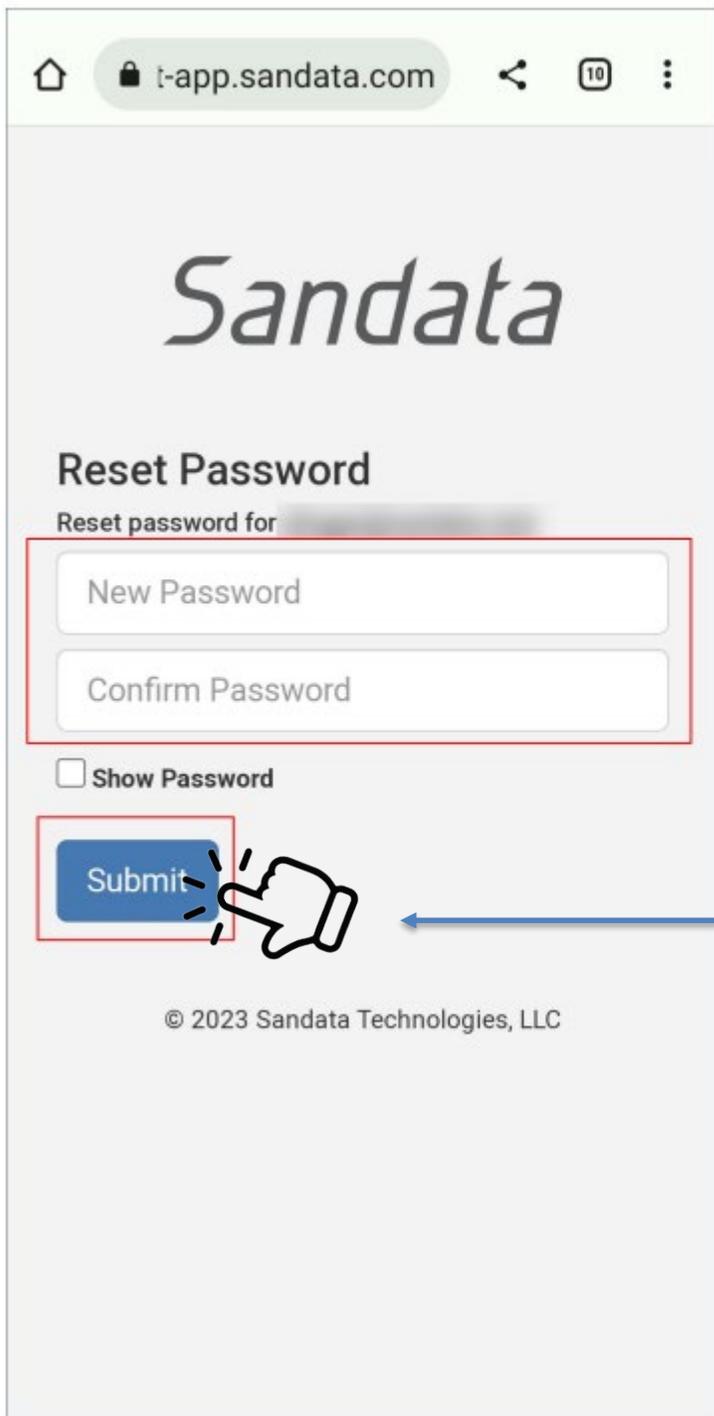
Step ⑤

Enter and re-enter your new password. Click "show password" to make sure everything looks correct.

Click **Submit**. A message will display that you've changed your password successfully.