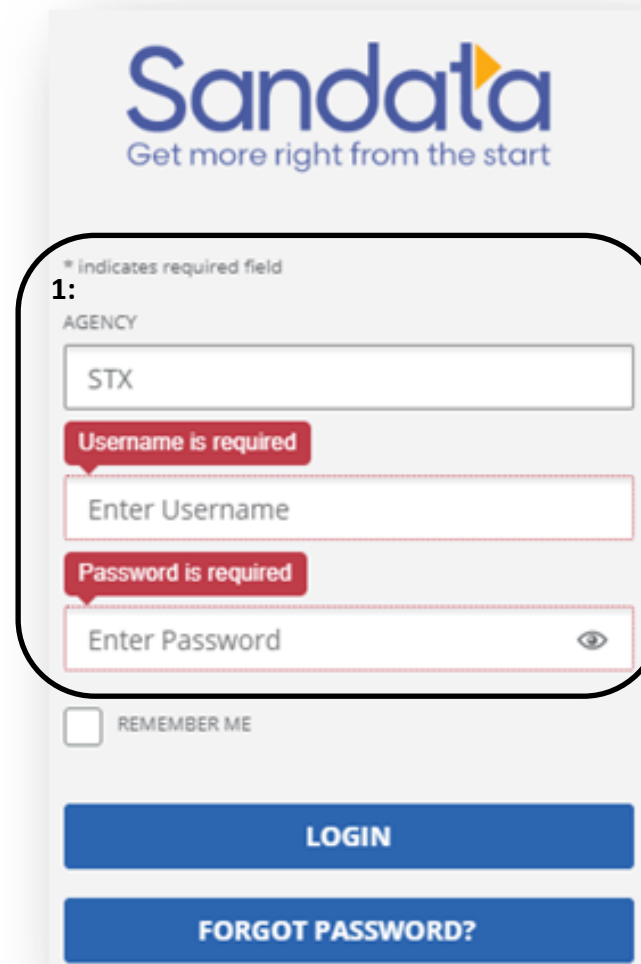


## Adding Tasks to a visit

**1:** Log into the EVV portal on *EVV.Sandata.com* with the proper STX code



The image shows the Sandata login page. At the top, the Sandata logo is displayed with the tagline "Get more right from the start". Below the logo, there is a note: "\* indicates required field". A red box highlights the login form, which includes the following elements:

- A label "1:" followed by "AGENCY".
- A text input field containing "STX".
- A red error message: "Username is required".
- A text input field with the placeholder "Enter Username".
- A red error message: "Password is required".
- A text input field with the placeholder "Enter Password" and an eye icon for toggling password visibility.
- A checkbox labeled "REMEMBER ME".
- A blue "LOGIN" button.
- A blue "FORGOT PASSWORD?" button.

**2:** Click the 2nd tab down on your left to get to the “Visit Maintenance” screen to your left side.

Select a Visit CREATE CALL

\* indicates required field

DATE RANGE \* MM/DD/YYYY

02/22/2024 to 02/22/2024

CLIENT Enter Client

EMPLOYEE Enter Employee

PAYER Select Payer

PROGRAM Select Program

SERVICE Select Service

CATEGORY Select Category

VISIT STATUS Select Visit Status

CLIENT MEDICAID ID Enter Client Medicaid ID



FILTER VISITS BY All Visits

[Show advanced filter options](#)

SEARCH CLEAR

**3:** Select the “Date Range” where adjustment is needed.

**3:** DATE RANGE \* MM/DD/YYYY

11/13/2023  to 11/13/2023 

PAYER: Select Payer ▼

PROGRAM: Select Program ▼

SERVICE: Select Service ▼

CATEGORY: Select Category ▼

CLIENT: Enter Client

EMPLOYEE: Enter Employee

VISIT STATUS: Select Visit Status ▼

CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Exceptions ▼

[Show advanced filter options ▼](#)

**Q SEARCH** **CLEAR**

## 4: Find the “Filter Visits By”

5: Choose the dropdown and select “All Visits.” Then “Search”.

\* indicates required field

DATE RANGE \* MM/DD/YYYY

02/22/2024  to 02/22/2024 

CLIENT

Enter Client

EMPLOYEE

Enter Employee

PAYER

Select Payer ▼

PROGRAM

Select Program ▼

SERVICE

Select Service ▼

CATEGORY

Select Category ▼

VISIT STATUS

Select Visit Status ▼

CLIENT MEDICAID ID

Enter Client Medicaid ID

**4:** FILTER VISITS BY


- All Visits ▲
- All Exceptions
- Exception Types
- All Visits

Show advanced filter options ▼

**5:**

 SEARCH CLEAR

**6:** Click on the visit that you wish to view in EVV by selecting the pencil icon under “Actions”.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	Approved	6: Actions
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	02/11/2024	03:00 PM			03:00 PM	07:00 PM	04:00	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	

7: A new screen will open. Click the “Tasks” tab.

8: Check off the tasks performed during the shift.

7: **TASKS**

Task ID	Description	Reading	Manually Added	Status	Select Task
0167	Accompany client to medical appointments, if necessary.	<input type="text"/>			<input checked="" type="checkbox"/>
0160	Administer medications+treatments prescribed by licensed phys	<input type="text"/>			<input checked="" type="checkbox"/>
0162	Administer skilled services as ordered by the physician.	<input type="text"/>			<input checked="" type="checkbox"/>
0249	Ambulation assist	<input type="text"/>			<input checked="" type="checkbox"/>
0235	Bathe or groom or hygiene	<input type="text"/>			<input checked="" type="checkbox"/>

Showing 1 to 5 of 53 entries

« < 1 2 3 4 5 > »

9: Select the “Reason Code. Enter a reason note and click “Save”.

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- TASKS**
- EXCEPTIONS
- GPS
- MEMO
- HISTORY

Task ID	Description	Reading	Manually Added	Status	Select Task
0160	Administer medications+treatments prescribed by licensed phys	<input type="text"/>	Yes	Completed	<input checked="" type="checkbox"/>
0162	Administer skilled services as ordered by the physician.	<input type="text"/>	Yes	Completed	<input checked="" type="checkbox"/>
0235	Bathe or groom or hygiene	<input type="text"/>	Yes	Completed	<input type="checkbox"/>
0249	Ambulation assist	<input type="text"/>	Yes	Completed	<input checked="" type="checkbox"/>
0167	Accompany client to medical appointments, if necessary.	<input type="text"/>			<input type="checkbox"/>

Showing 1 to 5 of 53 entries

« < 1 2 3 4 5 > »

\* indicates required field

9: REASON CODE \*      RESOLUTION CODE      REASON NOTE

Select Reason ...      Resolution Code      Reason Note      **SAVE**

10: Now you must return to the visit maintenance screen to find and select the shift and approve it

11: Check the box under "Approved".

**10:**

Visit Maintenance

\* Indicates required field

DATE RANGE \* MM/DD/YYYY: 01/01/2024 to 01/31/2024

CLIENT: hamill

EMPLOYEE: Enter Employee

PAYER: Select Payer

PROGRAM: Select Program

SERVICE: Select Service

CATEGORY: Select Category

VISIT STATUS: Select Visit Status

CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Visits

Show advanced filter options

SEARCH CLEAR

EXPORT

APPROVE ALL DISAPPROVE ALL

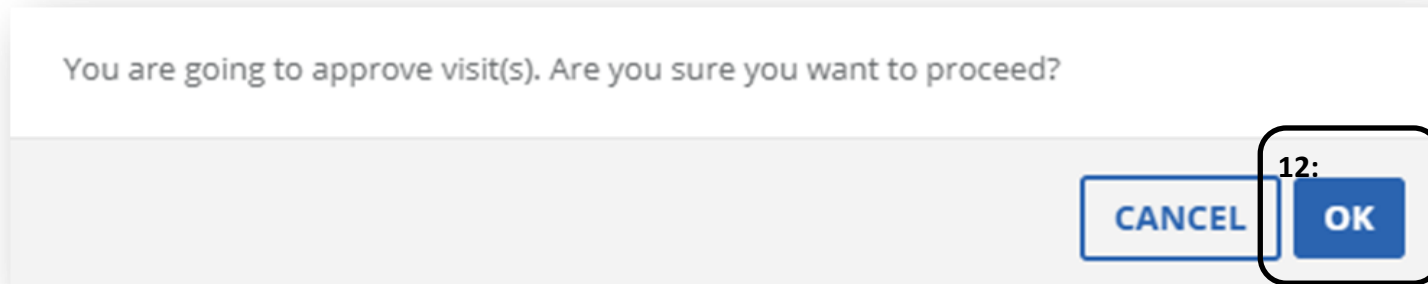
ROWS PER PAGE: 50 Show Display Options

Show Legend

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	11: Approved	Actions
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/24/2024	08:00 AM			08:00 AM	10:00 AM	02:00	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/24/2024	08:00 AM			08:00 AM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	



**12:** A message will pop up “You are going to approve visit(s). Are you sure you want to proceed?” Select “Ok”.



**13:** Another message will pop up “Success, visit is successfully updated”.

**You are now done!**

