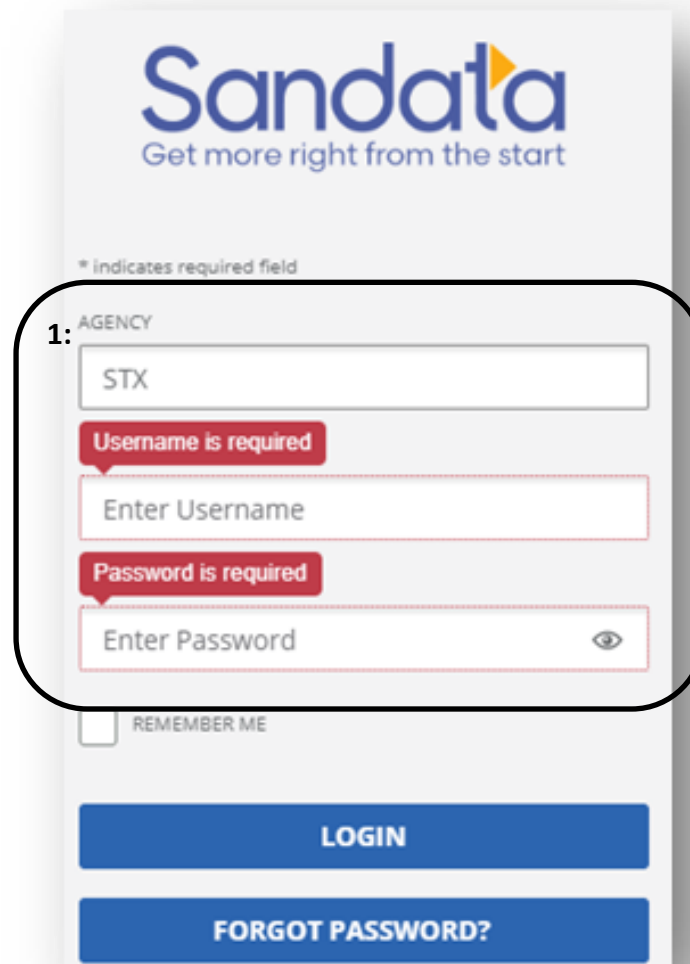


## Approving and Viewing existing shifts in EVV

**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, a note states "\* indicates required field". The login form is highlighted with a rounded black border and contains the following elements:

- A label "1: AGENCY" next to a text input field containing "STX".
- A red error message "Username is required" pointing to a text input field with the placeholder "Enter Username".
- A red error message "Password is required" pointing to a text input field with the placeholder "Enter Password" and a toggle icon.
- A checkbox labeled "REMEMBER ME" below the password field.
- 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

SEARCH CLEAR

[Show advanced filter options](#)

**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:

Q SEARCH

CLEAR

**6:** You will now see the existing shifts for the date range entered.

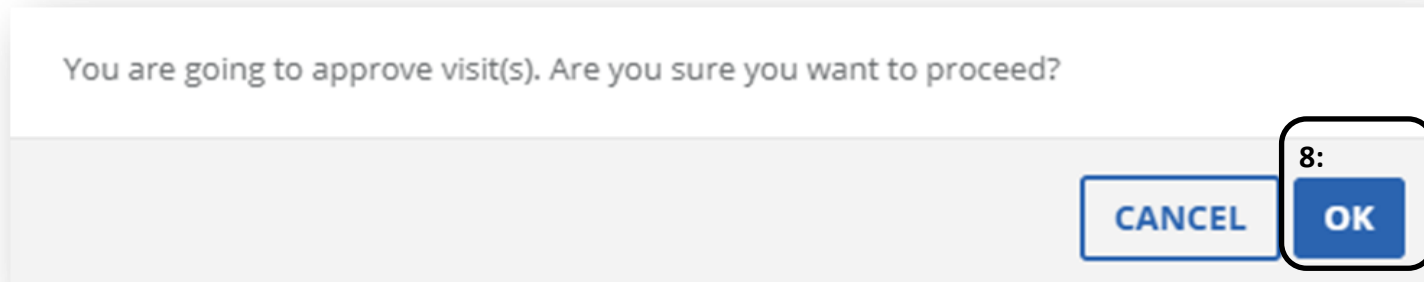
**Note -** Only shifts in the “Verified” visit status can be approved.

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	Actions
<b>6:</b> Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/25/2024	08:00 AM	04:00 PM	08:00	08:00 AM	04:00 PM		Verified	<input type="checkbox"/>	<input type="checkbox"/>	
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/24/2024	08:00 AM	04:33 PM	08:33	08:00 AM	04:33 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/24/2024	08:00 AM			08:00 AM	10:00 AM	02:00	Omit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

7: Now to approve a shift you must check the box under “Approved”.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	7: Approved	Actions
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/25/2024	08:00 AM	04:00 PM	08:00	08:00 AM	04:00 PM		Verified	<input type="checkbox"/>	<input type="checkbox"/>	
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/24/2024	08:00 AM	04:33 PM	08:33	08:00 AM	04:33 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
Hamill, Julio	Lockman, Quentin	LAH Personal Care-SD	01/24/2024	08:00 AM			08:00 AM	10:00 AM	02:00	Omit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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



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

**You are now done!**

