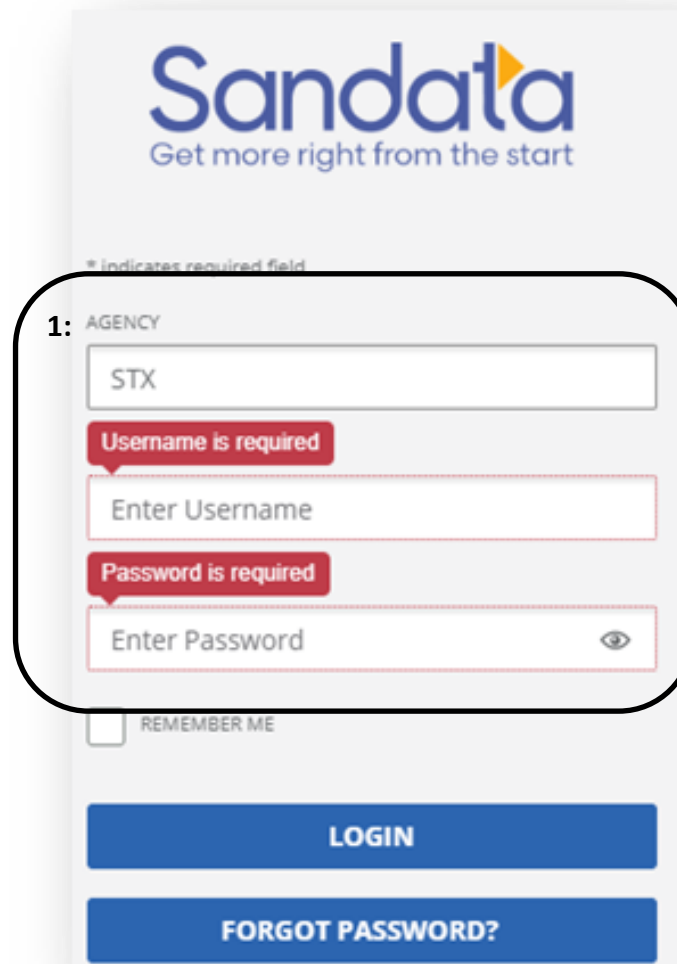


Changing a service in EVV

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



The image shows a screenshot of the Sandata login page. The Sandata logo is at the top with the tagline "Get more right from the start". Below the logo, there is a small note: "* indicates required field". The login form is highlighted with a black rounded rectangle. It 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 the text input field.
- A text input field with the placeholder text "Enter Username".
- A red error message "Password is required" pointing to the password input field.
- A text input field with the placeholder text "Enter Password" and an eye icon for toggling visibility.
- 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 to CLIENT EMPLOYEE



PAYER PROGRAM SERVICE CATEGORY

VISIT STATUS CLIENT MEDICAID ID FILTER VISITS BY

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: 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 “General” tab.

8: In the 5th row down select “Service” and adjust to the authorized service performed.

7: GENERAL

CLIENT

EMPLOYEE

CALL LOG

TASKS

EXCEPTIONS

GPS

MEMO

HISTORY

VISIT FROM DATE: 02/11/2024

VISIT TO DATE: None

VISIT TIME ZONE: US/Central

VISIT STATUS: Incomplete

CALL IN: 08:00 AM

CALL OUT: None

CALL HOURS: None

ADJUSTED IN DATE: 02/11/2024

ADJUSTED IN HH:MM AM/PM: 08:00 AM

ADJUSTED OUT DATE: 02/11/2024

ADJUSTED OUT HH:MM AM/PM: 08:30 AM

AGENCY ID: 400500

AGENCY NAME: Allied ADMH Training

PAYER: ALMH

PROGRAM: ID

8: SERVICE: ID Adult Comp...

CLIENT VERIFIED TIME: No

CLIENT VERIFIED SERVICE: No

CLIENT SIGNATURE: No

VISIT SOURCE: ALLIED AL

DO NOT BILL

APPROVED

* indicates required field

REASON CODE *: Select Reason ...

RESOLUTION CODE: Select Resoluti...

REASON NOTE: Reason Note

SAVE

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

GENERAL	VISIT FROM DATE 02/11/2024	VISIT TO DATE None	VISIT TIME ZONE US/Central	VISIT STATUS Incomplete
CLIENT	CALL IN 08:00 AM	CALL OUT None	CALL HOURS None	
EMPLOYEE	ADJUSTED IN DATE 02/11/2024	ADJUSTED IN HH:MM AM/PM 08:00 AM	ADJUSTED OUT DATE 02/11/2024	ADJUSTED OUT HH:MM AM/PM 08:30 AM
CALL LOG	AGENCY ID 400500	AGENCY NAME Allied ADMH Training		
TASKS	PAYER ALMH	PROGRAM ID	SERVICE ID Adult Comp...	
EXCEPTIONS	CLIENT VERIFIED TIME No	CLIENT VERIFIED SERVICE No	CLIENT SIGNATURE No	
GPS	VISIT SOURCE ALLIED AL			
MEMO	<input type="checkbox"/> DO NOT BILL	<input type="checkbox"/> APPROVED		
HISTORY	* indicates required field			
9: REASON CODE * Select Reason ...				RESOLUTION CODE Select Resoluti...
REASON NOTE 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

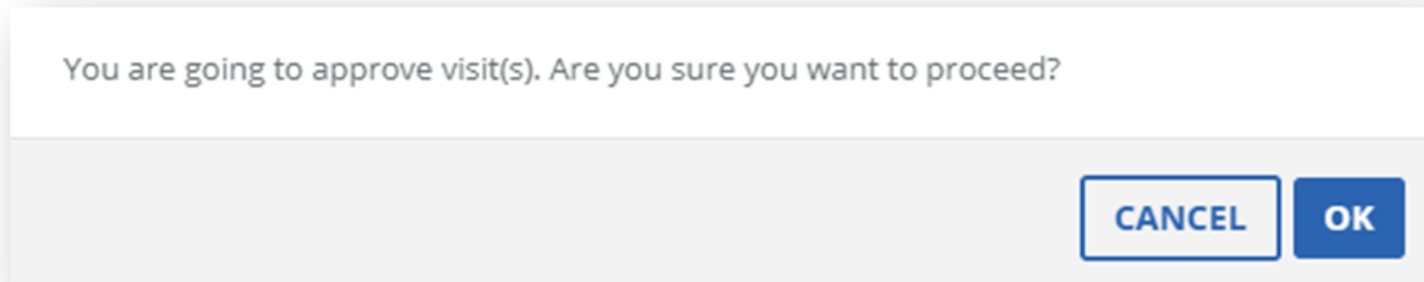
APPROVE ALL DISAPPROVE ALL

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!

