

# Manually adding a shift 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 portal. At the top, the Sandata logo is displayed with the tagline "Get more right from the start". Below the logo, a small asterisk indicates that certain fields are required. The login form includes an "AGENCY" label, a text input field containing "STX", and a red error message "Username is required". Below this is another text input field labeled "Enter Username". A second red error message "Password is required" is shown above a text input field labeled "Enter Password", which also features a toggle icon for password visibility. At the bottom of the form, there is a "REMEMBER ME" checkbox and two blue buttons labeled "LOGIN" and "FORGOT PASSWORD?". A red rounded rectangle highlights the "AGENCY" field, the "Username is required" message, the "Enter Username" field, the "Password is required" message, and the "Enter Password" field. A "1:" label is positioned to the left of the "AGENCY" field.

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:** Once you are on the “Visit Maintenance” screen select “Create Call” on your top right in blue.

Select a Visit

\* 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 ▾

Q SEARCH CLEAR

3: CREATE CALL

4: Type client name, then search.

5: Select the client in reference and click “Next”.

Create New Call

1. Find Client    2. Find Employee    3. Set Date and Time

Select Client

4: CLIENT FIRST NAME: julio    CLIENT LAST NAME: Enter Client Last Name    CLIENT MEDICAID ID: Enter Client Medicaid ID    CATEGORY: Select Category

SUPERVISOR: All    PAYER: Select Payer     LAST ACTIVE DATE

4: Q SEARCH    CLEAR

Client ID	Client Name	Client Medicaid ID	Supervisor	5: Select
10090	Hamill, Julio	0277158757000		<input type="radio"/>

« < 1 > »

PREVIOUS    5: NEXT    CANCEL

**6:** Next type employee name, then search.

**7:** Select the employee in reference and click “Next”.

The screenshot shows a 'Create New Call' form with a left-hand navigation menu. The main form area has three steps: '1. Find Client', '2. Find Employee', and '3. Set Date and Time'. The '2. Find Employee' step is active. It contains a 'Select Employee' section with three input fields: 'EMPLOYEE FIRST NAME' (containing 'Quentin'), 'EMPLOYEE LAST NAME' (containing 'Enter Employee Last Name'), and 'LAST ACTIVE DATE'. Below these fields are 'Q SEARCH' and 'CLEAR' buttons. A table below shows search results with columns 'Employee ID' and 'Employee Name'. The first row contains '30898' and 'Lockman, Quentin'. A 'Select' button with a radio button is next to the name. At the bottom right, there are 'PREVIOUS', 'NEXT', and 'CANCEL' buttons. Annotations with numbers 6 and 7 are placed over the search and selection elements.

6: [EMPLOYEE FIRST NAME: Quentin] [EMPLOYEE LAST NAME: Enter Employee Last Name] [LAST ACTIVE DATE]

6: [Q SEARCH] [CLEAR]

Employee ID	Employee Name
30898	Lockman, Quentin

7: [Select]

7: [NEXT]

**8:** Select call date and in time for the shift.

**9:** Select location as “home” or “community” .

**10:** Choose the authorized service and click “Finish”.

The screenshot shows the 'Create New Call' interface. On the left is a navigation sidebar with options: 'Navigate Modules', 'Visit Maintenance', 'Reports', 'Data Entry', 'XREF', 'Security', and 'Online Manual'. The main content area is titled 'Create New Call' and contains a progress bar with three steps: '1. Find Client', '2. Find Employee', and '3. Set Date and Time'. The '3. Set Date and Time' step is active. Below the progress bar is the 'Set Date and Time' form. It includes a note '\* indicates required field'. The form has the following fields: 'CALL DATE \* MM/DD/YYYY' with the value '01/24/2024' and a calendar icon; 'CALL TIME \* HH:MM AM/PM' with the value '08:00 AM' and a clock icon; 'TIME ZONE' with the value 'US/Central'; 'LOCATION \*' with a dropdown menu showing 'Home'; and 'SERVICE' with a dropdown menu showing 'LAH Personal Care-SD'. At the bottom right are three buttons: 'PREVIOUS', 'FINISH', and 'CANCEL'. Annotations with black boxes and numbers point to the 'CALL DATE' field (8), the 'LOCATION \*' dropdown (9), and the 'SERVICE' dropdown and 'FINISH' button (10).

Q Navigate Modules

Visit Maintenance

Reports

Data Entry

XREF

Security

Online Manual

Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

\* indicates required field

**8:** CALL DATE \* MM/DD/YYYY 01/24/2024

CALL TIME \* HH:MM AM/PM 08:00 AM

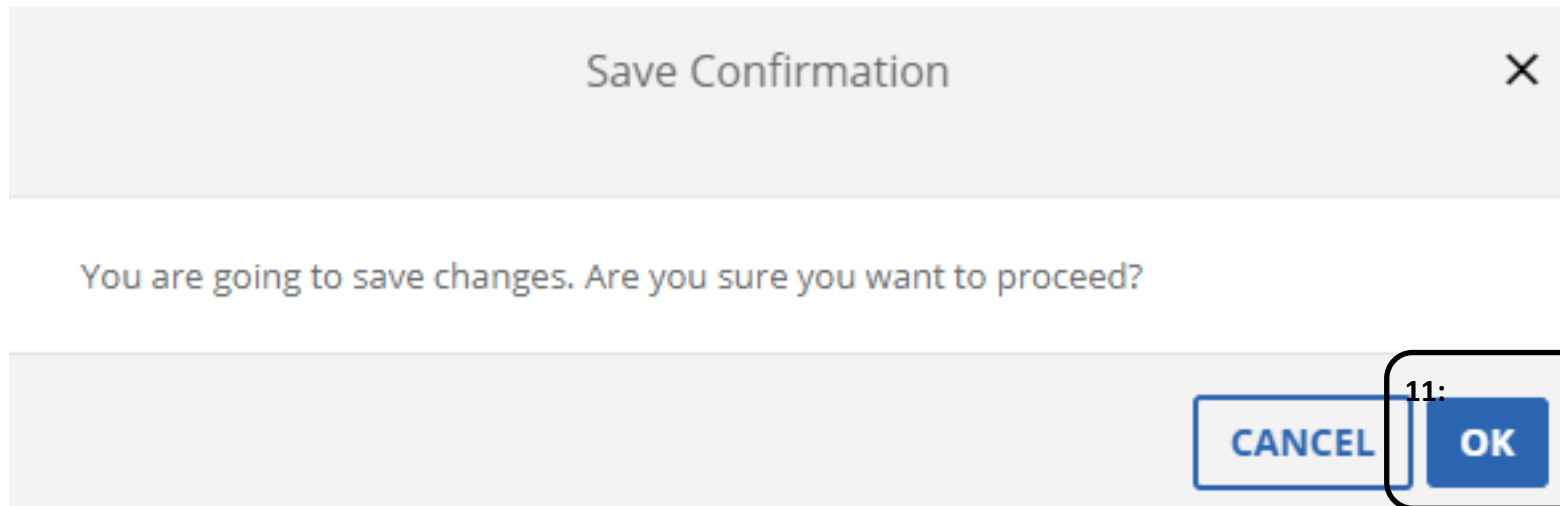
TIME ZONE US/Central

**9:** LOCATION \* Home

**10:** SERVICE LAH Personal Care-SD

PREVIOUS **10:** FINISH CANCEL

**11:** Next it will ask if you'd like to save your changes. Hit "Ok".



**12:** Now you must return to the visit maintenance screen to find and select the shift to add your out time.

**13:** Click the pencil icon on the shift in reference.

**12:** 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	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"/>	

**13:**



14: Next you must click the general tab to add the out time in the 3rd row down.

15: Select the reason code and reason note and click “save”.

**GENERAL**

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

HISTORY

VISIT FROM DATE: 01/24/2024

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: 01/24/2024

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

**14:** ADJUSTED OUT DATE: 01/24/2024

ADJUSTED OUT HH:MM AM/PM: 01:00 PM

AGENCY ID: 400500

AGENCY NAME: Allied ADMH Training

PAYER: ALMH

PROGRAM: LAH

SERVICE: LAH Personal C...

CLIENT VERIFIED TIME: No

CLIENT VERIFIED SERVICE: No

CLIENT SIGNATURE: No

VISIT SOURCE: ALLIED AL

DO NOT BILL  APPROVED

\* indicates required field

**15:** REASON CODE \*: 03 Update to T...

RESOLUTION CODE: Select Resoluti...

REASON NOTE: manual shift

SAVE

CANCEL

**16:** Next you must go to the “Exceptions” tab and acknowledge any outstanding exceptions.

**17:** Select the reason code and reason note and click “save”.

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

**EXCEPTIONS**

GPS

MEMO

HISTORY

SELECT ALL

● Visit Verification Exception

● Client Signature Exception

● Missing Tasks

**16:**  ACKNOWLEDGE THIS EXCEPTION

ACKNOWLEDGE THIS EXCEPTION

This exception needs to be fixed

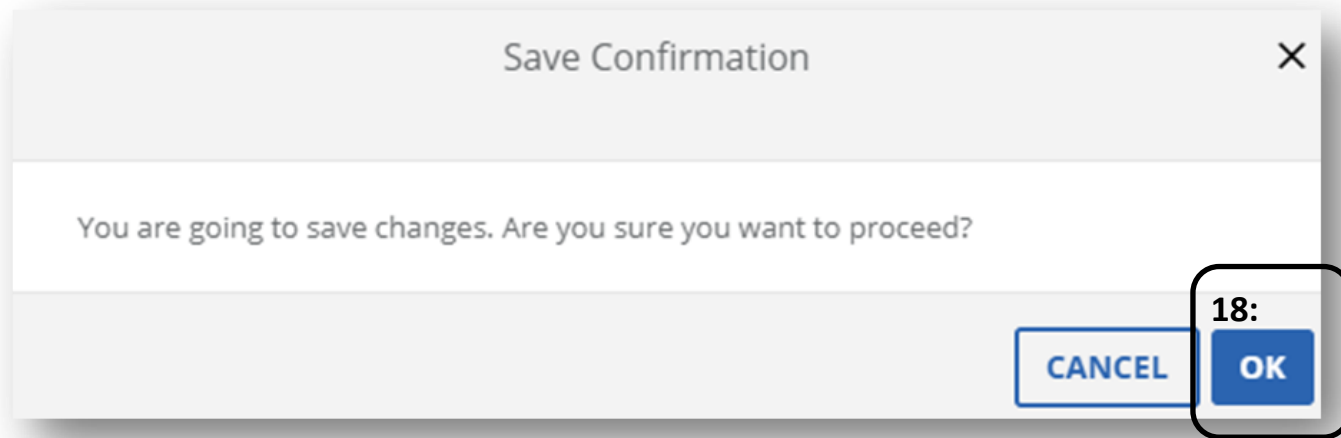
\* indicates required field

**17:** REASON CODE \*      RESOLUTION CODE      REASON NOTE

Select Reason ... ▼      Select Resoluti... ▼      Reason Note

**SAVE**

**18:** A message will pop up “Save Confirmation”. Select “Ok”.



**19:** Next you must go to the “Tasks” tab to add in tasks done during the shift. Check off boxes for tasks that were completed.

**20:** Select the reason code and reason note and click “save”.

The screenshot shows a sidebar on the left with menu items: GENERAL, CLIENT, EMPLOYEE, CALL LOG, TASKS (highlighted), EXCEPTIONS, GPS, MEMO, and HISTORY. The main area contains a table with the following data:

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"/>


Below the table, it says "Showing 1 to 5 of 53 entries" and includes a pagination control with buttons for «, <, 1, 2, 3, 4, 5, >, and ».

**19:** A callout box highlights the "Select Task" column of the table, showing that the checkboxes for the first five tasks are checked.

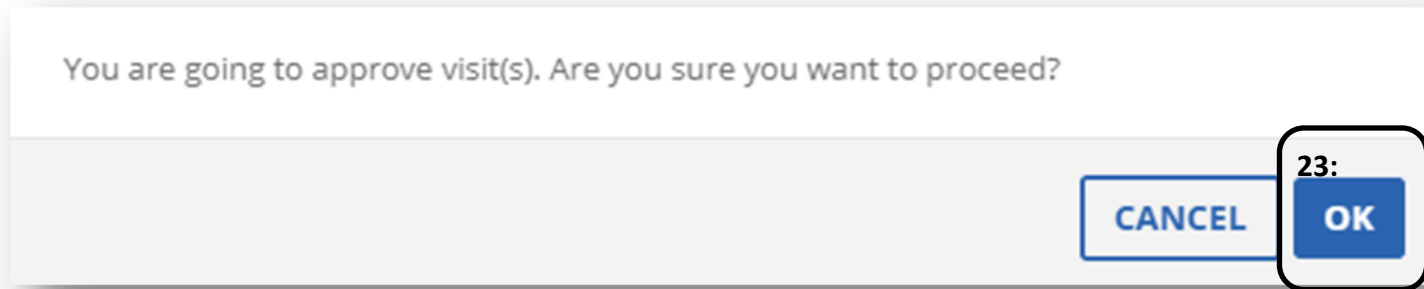
**20:** A callout box highlights the form at the bottom of the page, which includes a note "\* indicates required field", three input fields: "REASON CODE \*" (with a dropdown menu showing "Select Reason ..."), "RESOLUTION CODE" (with a dropdown menu showing "Resolution Code"), and "REASON NOTE" (with a text input field), and a "SAVE" button.

**21:** Now close out of the box your in and you will be back on the visit maintenance screen where the shift in reference should still show.

**22:** Click the box under “Approved” to now approve the shift.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	22: Approved	Actions
Abernathy, Hugh	Ebert, Augustine	ID Personal Care-SD	01/31/2024	08:00 AM	01:51 PM	05:51	08:00 AM	01:51 PM		Verified	<input type="checkbox"/>	<input type="checkbox"/>	

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



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

**You are now done!**

