



EVV Steps

Advisor Version 2021.5

This is a guide to assist the customer to navigate the many requirements for EVV compliance. It is written in a form that may be sent to a provider as a checklist or utilized by the implementation staff as a checklist.

List of Topics

- Request Alternate EVV Vendor/Obtain Production Credentials
- Consumer/Employee Setup
- Final EVV Setup
- List of Reports

Request Alternate EVV Vendor/Obtain Production Credentials

In order to begin using the Anywhere system for EVV tracking, users must notify Sandata that they wish to use an alternate EVV vendor, and obtain production credentials. Below are the steps:

- _____ Connect with Primary Solutions to inform of the choice of 'EVV Alternate Provider.
- _____ Confirm your email, Medicaid Provider Number and Tax ID in MITS – this could cause delays if this step is skipped!
- _____ Provider emails Sandata at OHALTEVV@sandata.com to notify them of intent to use Primary Solutions/Advisor Anywhere as their alternate EVV vendor.
- _____ Sandata will supply the agency with a user name and password for sandatalearn.com.
- _____ Sandata will require an aggregator training. It is a scheduled 45 minute training.
- _____ Once the training is completed, providers will be given access to Etraonline.net and the aggregator.
- _____ Lastly, the provider is issued production credentials.

Consumer/Employee Setup

While waiting for production credentials, users may update Advisor and assure that all information that is required to transfer is completed.

- Edit Consumers window for individuals that are EVV-eligible should have:
 - Full name (General 1)
 - Billing Number (General 1)
 - Full Address information (General 2) Address, City, State, Zip Code



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- Click on the 'GeoCode' button to pull latitude/longitude required information.
- Edit Employees window should have:
 - First/Last Name
 - Social Security number
 - Email: Per ODM, this must be a unique email.
- _____When Sandata issues the Production Credentials, they should be sent to Primary Solutions staff who will walk the administrator through the final set up. The agency may also complete these steps on their own. (see Final Set up section).

Final EVV Set Up

- _____In Advisor, go to Administration/Vendors and enter the following based on the Production Credentials paperwork:
 - EVV # - copied/pasted from the Business Entity ID on the form
 - Provider # - copied/pasted from the Business Entity Medicaid Identifier # on the form
 - Send EVV Data checkbox – must be checked
 - EVV Login
 - User ID – copied/pasted from the Production Credential form
 - Password – copied/pasted from the Production Credential form
 - Email – general email of administrator or person responsible for billing



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- _____ In Advisor, go to Edit Consumers/General 1 and enter the following for every consumer that receives HPC services in EVV locations (ones that are not considered 'group' settings).
 - Open the EVV Eligibility History button
 - Insert the Start Date of when you plan to begin transmitting EVV data.

- The EVV Client application must be installed. The Primary Solutions Implementation Lead will enter a Service ticket for the EVV Client application to be installed on your server prior to the Go Live Date. PSI's IT staff will coordinate with agency's IT staff to install.
 - Primary Solutions will also install the application, Always Up.



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- This ensures that the visit information goes to Sandata regularly without interruption.
- Sometimes server backs up or reboots will cause the EVV Client to close down. By installing Always Up, it reboots the EVV Client for non-interrupted transmissions.
- _____ Production/live data will begin to flow at 2am following the above installation. The provider will need to check the Sandata Aggregator account the following day to verify the data is being received as expected.
- _____ The Provider **MUST** inform Sandata that they have verified the data is transmitting correctly.

CONGRATULATIONS! This agency is now ready to transmit information to Sandata and have met the requirements of set up based on the Ohio Department of Medicaid.



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List of Reports

- EVV Events Status report
 - This report will list the current status of each visit based on the filters in the report.
 - Filters include:
 - Create Date/Time
 - Description
 - Event Error
 - Process Date/Time
 - Process Date/Time
 - Record Type
 - Response Status

Create Date/Time	Record Type	Description	Processed Date/Time	Response Status	Event Error
3/23/2020 18:23:31	Consumers	EWConsumer, Four, EVVCON4			
3/25/2020 16:29:57	Consumers	Orange, Tangee, oragnce			
3/25/2020 16:07:01	Consumers	O'Malley, Tally, PARSMVA			

- EVV Events Unable to Send report
 - This report will list the records that were not transmitted to Sandata.
 - Filters include:
 - Process Date/Time
 - Event Error
 - Record Type
 - Description



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Event Object	Processed Date/Time	Event Error	ID Description
Persons	9/5/2019 00:00:00	Missing eligibility date	52 Rheinfrank (NC), Michelle (NC) RHEINM

- EVV Sandata Errors report
 - This report will list the records that resulted in an error at Sandata.
 - Filters include:
 - Process Date/Time
 - Response Status
 - Record Type
 - Description

Record Type	Description	Processed Date/Time	Response Status
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- EVV Successfully Sent report
 - This report will list the records that were received by Sandata during transmission process.
 - Filters include:
 - Process Date/Time
 - Record Type



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Record Type	Description	Processed Date/Time	Response Status
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This document was written with the assumption that the security for this module/function is already in place. For additional information, please see the related set-up guide or contact your systems administrator.