

# EVV Program

## Training Registration Process

Created for:

**NCDHHS**

DECEMBER 2, 2020



**VERSION 1.2**

Sandata Technologies  
26 Harbor Park Drive  
Port Washington, NY 11050  
800-544-7263  
info@sandata.com

# Revision History

Date	Version	Author	Description
10/26/2020	1	Sandata	Initial creation of Registration Process
11/13/2020	1	Sandata	Updated for NC process change
11/18/2020	1.1	Sandata	Updated program acronym
12/2/2020	1.2	Sandata	Updated NPI note for admin training registration

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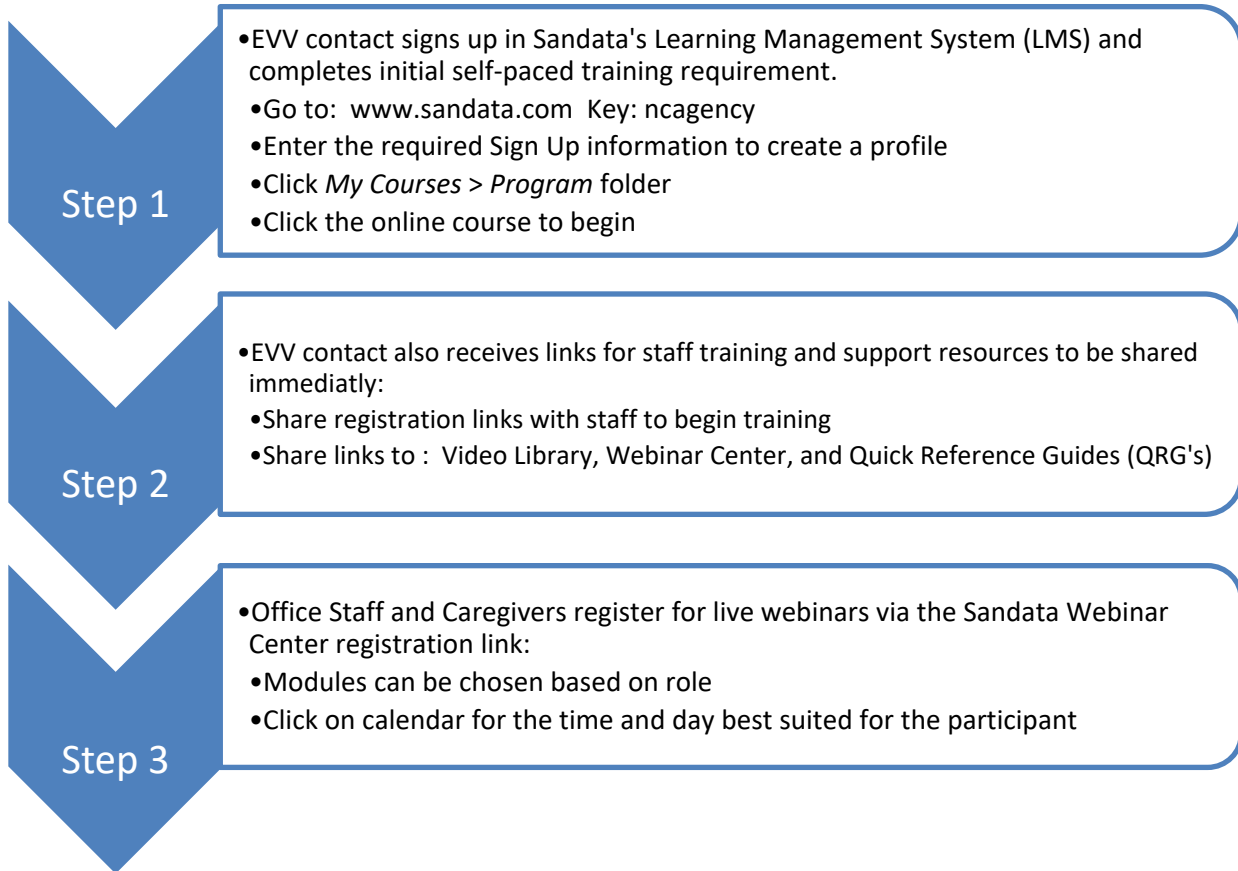
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# Overview

The Registration Overview outlined in this section is a high-level flow chart that walks through the registration process for the Sandata Electronic Visit Verification (“EVV”) Program. In the pages to follow, we will outline in detail the registration steps for the various training modalities. This document is based on the current registration process for Sandata training to all relevant user groups for the Program (i.e., Administration, Office Staff, and Caregivers), and will outline the process and procedure for each group.



# Administration

## EVV Contact/Provider Administrator

The EVV Contact/Provider Administrator is the resource that NCDHHS sends to Sandata in the provider file. In Sandata's experience, this resource is often not a day-to-day user of the EVV system so the training for these resources focus on:

- An introduction to the EVV system and all the included modules
- The Security/user roles and privileges defined for the NCDHHS program
- How to create other agency personnel as users in the EVV system

The EVV Contact/Provider Administrator's training is provided via pre-defined courses in Sandata's LMS ( [www.sandatalearn.com](http://www.sandatalearn.com) ). The EVV Contact/Provider Administrator receives an email that provides the following:

- <https://www.sandatalearn.com?KeyName=ncagency> (direct link)
- The URL link to the Video Library
- The URL link to the Webinar Center for staff registration

## Sandatlearn.com

- **For EVV Contacts/Agency Administrators only: Independent on-line courses delivered via a Learning Management System, "LMS"** – This modality is used for Agency Administrators to take an initial Overview and Security Module course. Agency Administrators can access the LMS 24 x 7 and take this course whenever it is convenient.
- **Key: ncagency**

LMS Course	Short Description
EVV System Overview (1 hour)	Overview of the all the modules of the Sandata EVV system, how to login, and how to navigate
Security Module (20 minutes)	This course provides an understanding of the functionality of the Security module, including how to search for, create, modify, and delete user records. Reset user passwords. Manage security roles and privileges.

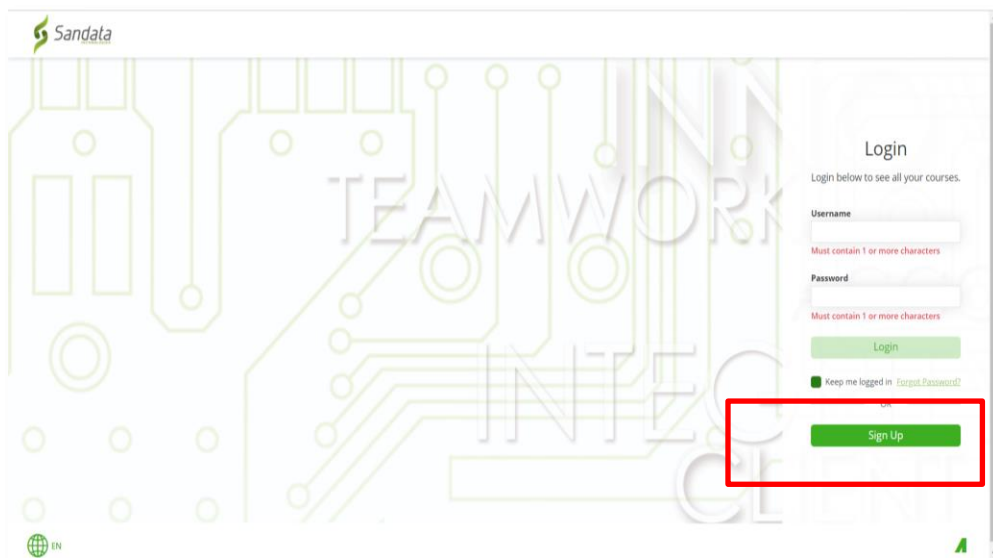
# Sandatalearn.com Registration

The Steps for registration are as follows:

## SIGNING UP FOR A Self-Paced LMS:

### STEP 1

- The EVV Contact/Agency Administrator will go to [www.sandatalearn.com](http://www.sandatalearn.com) and arrive at the login page.
- A first-time user will **CLICK “Sign Up”** at the bottom of the login box

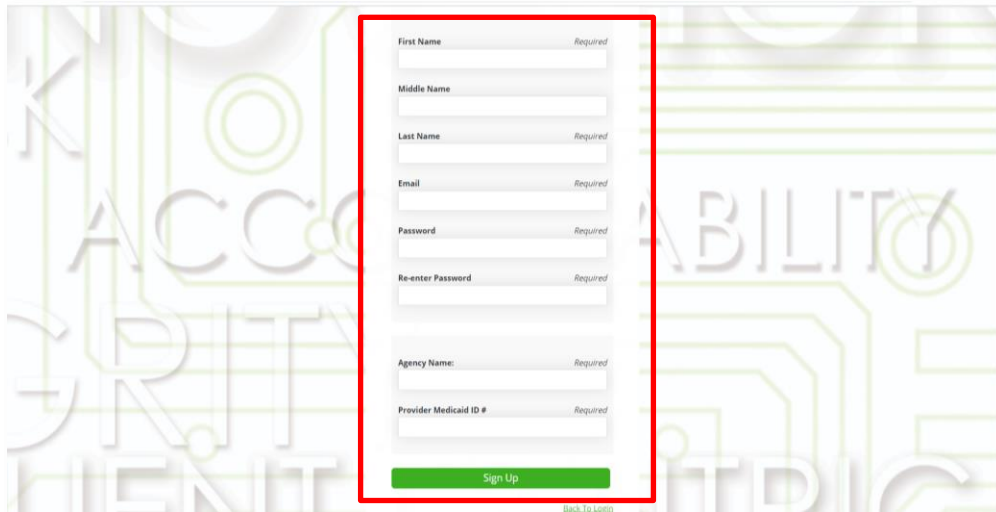


- The user will then enter an enrollment key: **ncagency** and **CLICK “sign up”**



## Step 2

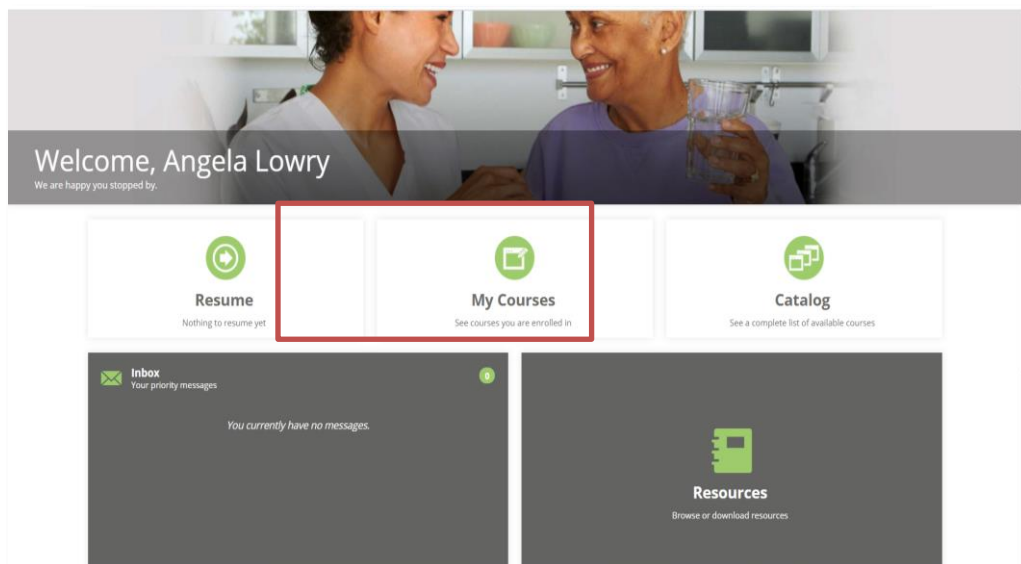
- The user will then see a box to enter the following information:
  - Name
  - Email
  - Password
  - Re-enter Password
  - Agency Name
  - Provider Medicaid ID **(Enter your NPI number in this field)**
- and **CLICK “Sign Up”**



A screenshot of a sign-up form with a red border around the input fields. The form contains the following fields: First Name (Required), Middle Name, Last Name (Required), Email (Required), Password (Required), Re-enter Password (Required), Agency Name (Required), and Provider Medicaid ID # (Required). A green "Sign Up" button is located at the bottom of the form. The background features a grid pattern and the word "ABILITY" in large letters.

## Step 3

- Once “Sign Up” is complete, the user will be welcomed into the landing page where they will **Click** on “My Courses”. The Overview and Security Modules are pre-assigned to the Administrators.



# Office Staff and Caregivers

## Office Staff

Home care provider agencies have staff with a variety of roles and responsibilities. EVV system training is structured as role-based, allowing agency resources to customize their training to their role at the agency. In smaller agencies where a single staff resource may fill several different roles, staff may need to take training on more than one area of functionality.

Training for the EVV Program will be delivered in a variety of modalities to accommodate various adult learning styles. The training modalities for the agency staff in the NCDHHS program include:

- ***Instructor-led Web-based Training (Webinar)*** – These are live webinars conducted using Zoom video communications software. Agency staff independently sign up for webinars via Sandata’s Webinar Center for days and times that are convenient for them. Webinars are also offered on some weekend and after-hours schedules to maximize choice for the provider agencies. Webinars can accommodate up to 100 participants per session and will have 2 trainers in attendance. Based on Sandata’s experience, it is highly recommended that a NCDHHS program resource attend all instructor-led webinar sessions to answer program and policy questions.
- ***Independent Web-based training (Self-Paced via Video Library)*** – This training modality allows a learner to independently access online role-based educational content. Video Library content has two formats: Videos that cover all aspects of EVV system functionality and webinar/zoom recordings of the instructor-led webinars. Self-paced learning allows a learner the flexibility of learning at their convenience. Content is available 24 x 7 via the Video Library, giving the learner control of when to train.

## Caregivers

Since caregivers will only be using the mobile application (Sandata Mobile Connect/ SMC), Telephonic Visit Verification/TVV, or Fixed Visit Verification/FVV they would only need to attend a Visit Capture webinar and/or a Group Visit webinar (if applicable). Caregivers may be given access to the Video Library for education and on-going information on the various visit capture technologies.



# Sandata Webinar Center

Sandata's agency staff webinar curriculum is as follows:

Topic	Audience	Short Description
EVV System Overview (1 hour)	Agency Office Staff	Overview of the all the modules of the Sandata EVV system, how to login, and how to navigate
Client/Employee /Authorization (45 min)	Agency Office Staff	How to search for, create, edit, and inactivate Client and/or Employee records.
Scheduling (45 min)	Agency Office Staff	How to create, edit and cancel schedules in the Sandata EVV system. It also explains the difference between individual schedules and recurring schedules.
Visit Capture (1 hour, 15 min)	Agency Office Staff, Caregivers	How a caregiver starts and completes a visit using the mobile app, telephony, and fixed visit verification methods. In addition, participants see how visits show in the Sandata EVV system.
Visit Maintenance (1 hour, 30 min)	Agency Office Staff	How to use the available filters to review visit data, understand the various visit exceptions, and how to clear/resolve each one. The user also learns how to manually create visits and adjust visits.
Group Visits (Agency) (45 min)	Agency Office Staff	How group visit information is viewed in Sandata EVV and how to perform visit maintenance on group visits.
Group Visits (Caregiver) (30 min)	Caregivers	How a caregiver starts and completes a group visit using mobile and telephonic visit verification methods.

# Sandata Webinar Center Registration

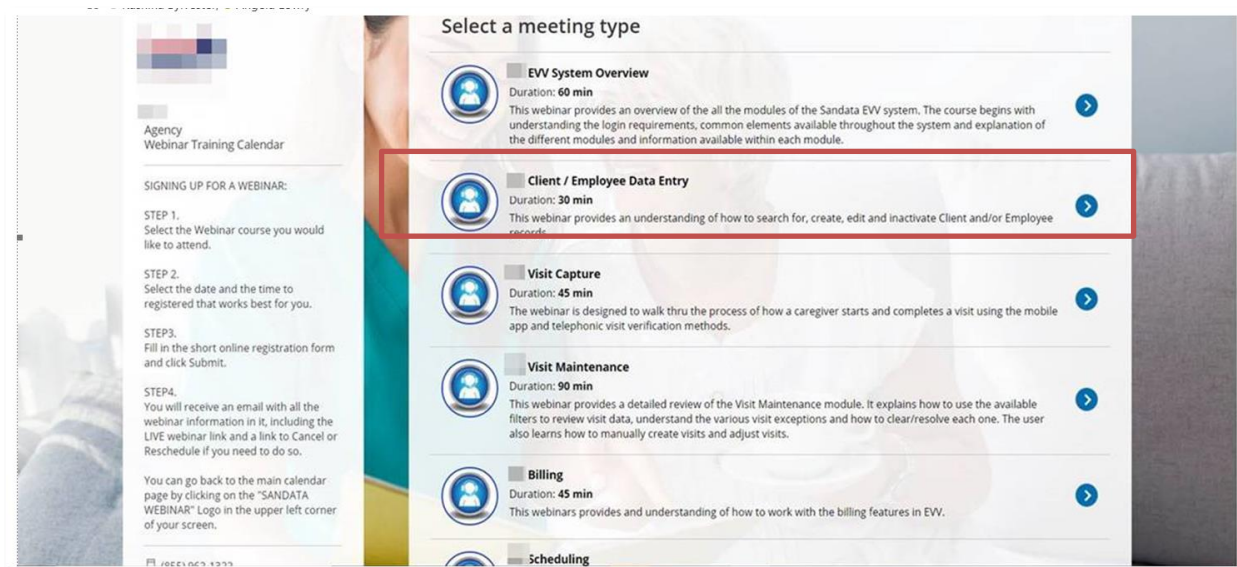
Office Staff and Caregivers will be provided links to the Sandata Webinar Center which will be tailored for NCDHHS' EVV program.

The Steps for registration are as follows:

## SIGNING UP FOR A WEBINAR:

### STEP 1.

- Select the Webinar course you would like to attend.



## STEP 2.

- Select the date and the time that works best for you.

The screenshot displays the 'Agency Webinar Training Calendar' interface. On the left, there are instructions for signing up for a webinar, including steps 1 through 4 and contact information. The main area shows a calendar for November 2020. The date '5' (Thursday) is circled in red. To the right of the calendar, a dropdown menu shows 'Available starting times for Thu, Nov 5, 2020' with '11:00 AM' selected and circled in red. The time zone is set to 'United States: Eastern time (GMT-4:00) [DST] (Change)'. Below the calendar, there are navigation arrows for 'October' and 'December'.

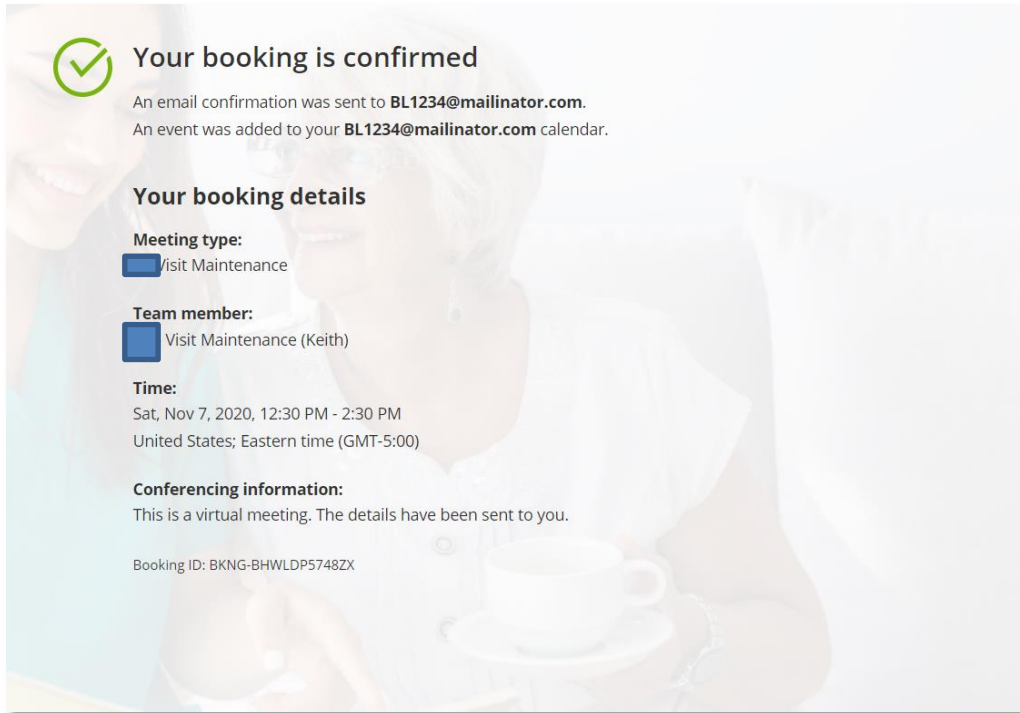
## STEP 3.


- Fill in the short online registration form and click *DONE*.

The screenshot shows the 'Provide information' registration form. The form is highlighted with a red border. It includes the following fields: 'Meeting type' (DC Client / Employee Data Entry), 'Time' (Thu, Nov 5, 2020, 11:00 AM - 11:30 AM), 'Team member' (DC), 'Agency Name\*', 'Provider Medicaid ID Number\*', 'Your Full Name\*', 'Your email\*', 'Office Phone', and 'Your Mobile Phone'. A 'Done' button is located at the bottom right of the form. The background shows a person holding a cup of coffee.

- As part of the registration process, you may choose to receive reminders about the upcoming webinar. You may choose to receive reminders via email, cell phone text or both. Reminders are sent 24 hours and 1-hour prior to the scheduled webinar start

## Booking Confirmation

A screenshot of a booking confirmation email. At the top left, there is a green checkmark icon. The main heading is "Your booking is confirmed". Below this, it states: "An email confirmation was sent to BL1234@mailinator.com. An event was added to your BL1234@mailinator.com calendar." The section "Your booking details" includes: "Meeting type: Visit Maintenance", "Team member: Visit Maintenance (Keith)", "Time: Sat, Nov 7, 2020, 12:30 PM - 2:30 PM, United States; Eastern time (GMT-5:00)", and "Conferencing information: This is a virtual meeting. The details have been sent to you." At the bottom, the "Booking ID: BKNG-BHWLDP5748ZX" is listed. The background of the email is a faded image of a woman smiling and holding a white coffee cup on a saucer.

 **Your booking is confirmed**

An email confirmation was sent to **BL1234@mailinator.com**.  
An event was added to your **BL1234@mailinator.com** calendar.

**Your booking details**

**Meeting type:**  
 Visit Maintenance

**Team member:**  
 Visit Maintenance (Keith)

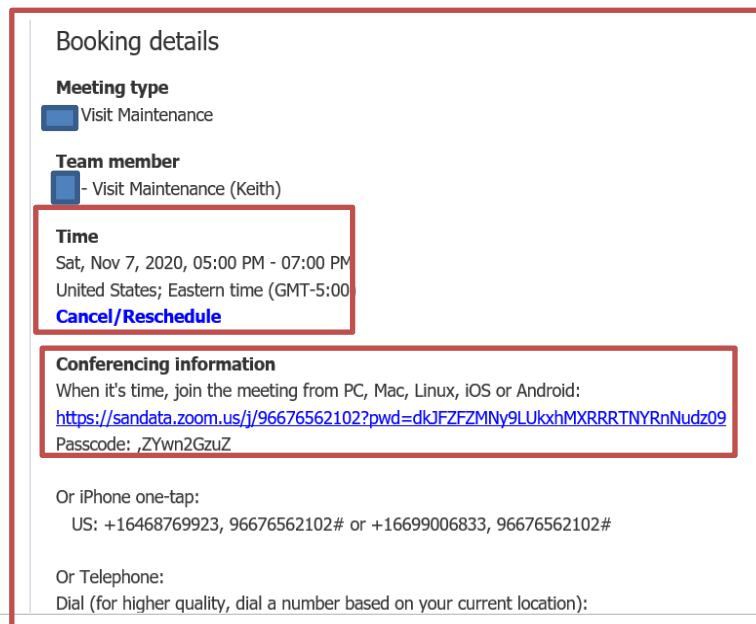
**Time:**  
Sat, Nov 7, 2020, 12:30 PM - 2:30 PM  
United States; Eastern time (GMT-5:00)

**Conferencing information:**  
This is a virtual meeting. The details have been sent to you.

Booking ID: BKNG-BHWLDP5748ZX

### STEP 4.

You will receive an email with all the webinar information in it, including the LIVE webinar link and a link to Cancel or Reschedule if you need to do so.

A screenshot of a Zoom meeting booking confirmation page. The page is titled "Booking details". It lists the "Meeting type" as "Visit Maintenance", the "Team member" as "Visit Maintenance (Keith)", and the "Time" as "Sat, Nov 7, 2020, 05:00 PM - 07:00 PM, United States; Eastern time (GMT-5:00)". There is a blue link for "Cancel/Reschedule". Below this is the "Conferencing information" section, which includes instructions to join from PC, Mac, Linux, iOS or Android, a Zoom link: "https://sandata.zoom.us/j/96676562102?pwd=dkJFZFZMNy9LUkxhMXRRRTNYRnNudz09", and a passcode: ",ZYwn2GzuZ". At the bottom, there are instructions for iPhone one-tap and telephone dialing. The entire content area is enclosed in a red border.

**Booking details**

**Meeting type**  
 Visit Maintenance

**Team member**  
 - Visit Maintenance (Keith)

**Time**  
Sat, Nov 7, 2020, 05:00 PM - 07:00 PM  
United States; Eastern time (GMT-5:00)  
[Cancel/Reschedule](#)

**Conferencing information**  
When it's time, join the meeting from PC, Mac, Linux, iOS or Android:  
<https://sandata.zoom.us/j/96676562102?pwd=dkJFZFZMNy9LUkxhMXRRRTNYRnNudz09>  
Passcode: ,ZYwn2GzuZ

Or iPhone one-tap:  
US: +16468769923, 96676562102# or +16699006833, 96676562102#

Or Telephone:  
Dial (for higher quality, dial a number based on your current location):

## Add to your calendar

### Calendar event

If the event is not already in your calendar, you may add it from here:

 [Add to Outlook Calendar](#)

 [Add to Google Calendar](#)

 [Add to Apple Calendar](#)

 [Mobile and other calendars](#)



### Your information

**Your Full Name**

Beatrice Leanne

**Agency Name**

BL HomeCare

**Provider Medicaid ID Number**

12345

Sandata wants to offer a seamless and easy process throughout the entire training cycle and we strive to offer the adult learner a meaningful experience. Offering flexibility and role-based training is one way we achieve our mission, and it starts at the registration process.

# Video Library

Administration and Office Staff will receive links that will take them directly to the Video Library. There is no registration process to access these training tools and they will be accessible throughout the life of the program and updated accordingly.

The screenshot displays the NCDHHS Provider Agency Training Video Library interface. At the top left is the NC Department of Health and Human Services logo. Below it, the text "NCDHHS Provider Agency Training" is visible. Two buttons are present: a green "Play" button and a dark grey "Subscribe for updates" button. The content is organized into three sections:

- SYSTEM OVERVIEW**: Contains two video thumbnails. The first is titled "Initial Log In Process" with a 4 MIN duration. The second is titled "Navigation" with a 6 MIN duration.
- SECURITY**: Contains four video thumbnails. The first is "Security Overview" (1 MIN), the second is "Manage Users Screen" (1 MIN), the third is "Create User" (4 MIN), and the fourth is "Modify" (2 MIN). A right-pointing arrow button is located to the right of the "Modify" thumbnail.
- ADDING CLIENTS AND CLIENT MAINTENANCE**: Contains four video thumbnails. The first is "Searching for a Client" (1 MIN), the second is "Creating a Client" (7 MIN), the third is "Modifying a Client's Record" (2 MIN), and the fourth is "Dischar" (2 MIN).

Each video thumbnail features the Sandata EVV logo and a duration indicator in the bottom left corner.