

The background features a hand in a white lab coat pointing at a futuristic digital interface. The interface consists of various icons and data visualizations, including a large circular gauge, a gear, a first aid kit, a person with a mask, a syringe, a magnifying glass, a pill, and a network diagram. The overall theme is healthcare and technology.

# Sandata

Get more right from the start

Connecticut Department of Mental Health and  
Addiction Services

Electronic Visit Verification (EVV) Provider Training  
Getting Started / System Overview



# Agenda

- System Functionality
- System Requirements
- Account Access
- Logging In
- Online Documentation
- Common Elements
- Demonstration

# System Functionality

The Connecticut EVV functionality includes:

- ▶ Electronic Visit Verification - Tracks Time and Tasks
- ▶ Provider EVV Web System - View and manage Home Care services
  - Provider Scheduling Module - Schedule visits based on authorized services
  - Provider Billing Module - Validates Home Care claims prior to submission

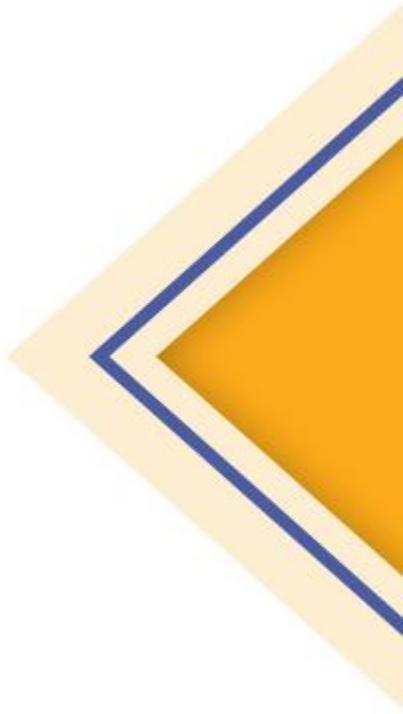
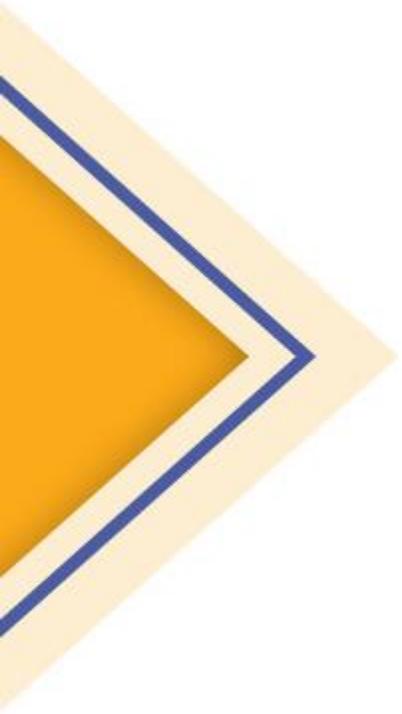


# System Requirements

- ▶ Sandata Agency Management
  - Web-based application accessed using a web browser
  - Supported browser are: Google Chrome, Mozilla Firefox, Microsoft Edge
- ▶ Acrobat Reader or other PDF Viewer to view reports
- ▶ Hard Drive and Internet Requirements
  - Internet connection — High Speed Broadband (T1, cable, FIOS)
  - Display Resolution: 1024 x 768 or higher
  - At least 2 GB RAM
  - At least 1 GB free space on the hard drive
- ▶ Sandata Agency Management is designed for use on desktops and laptops only



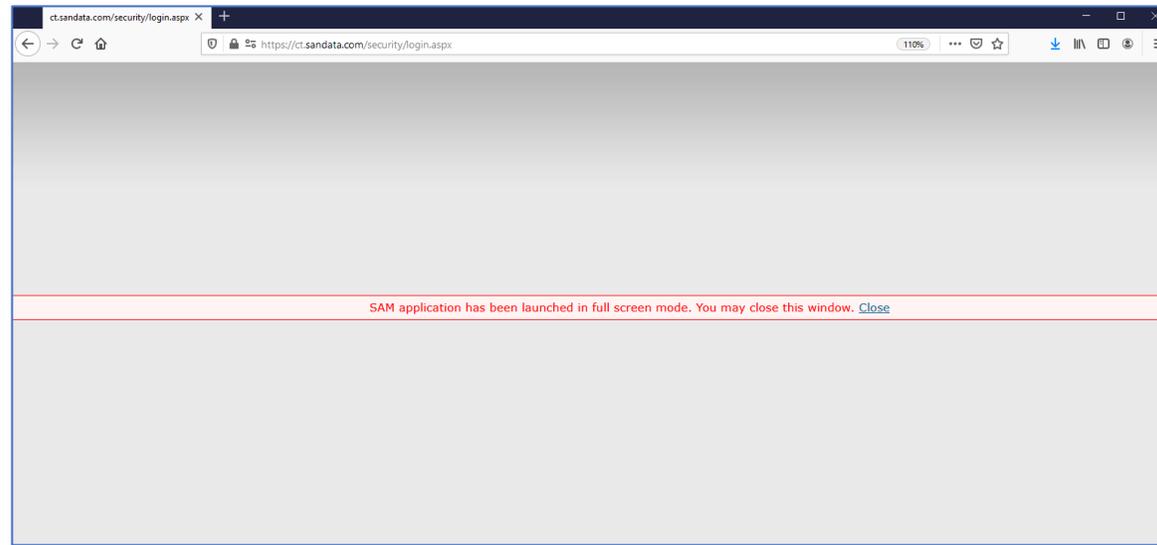
LOGGING IN



# Logging In

Once a user enters the database URL, two browser windows open

- The first window is the launch window and is used to launch the application

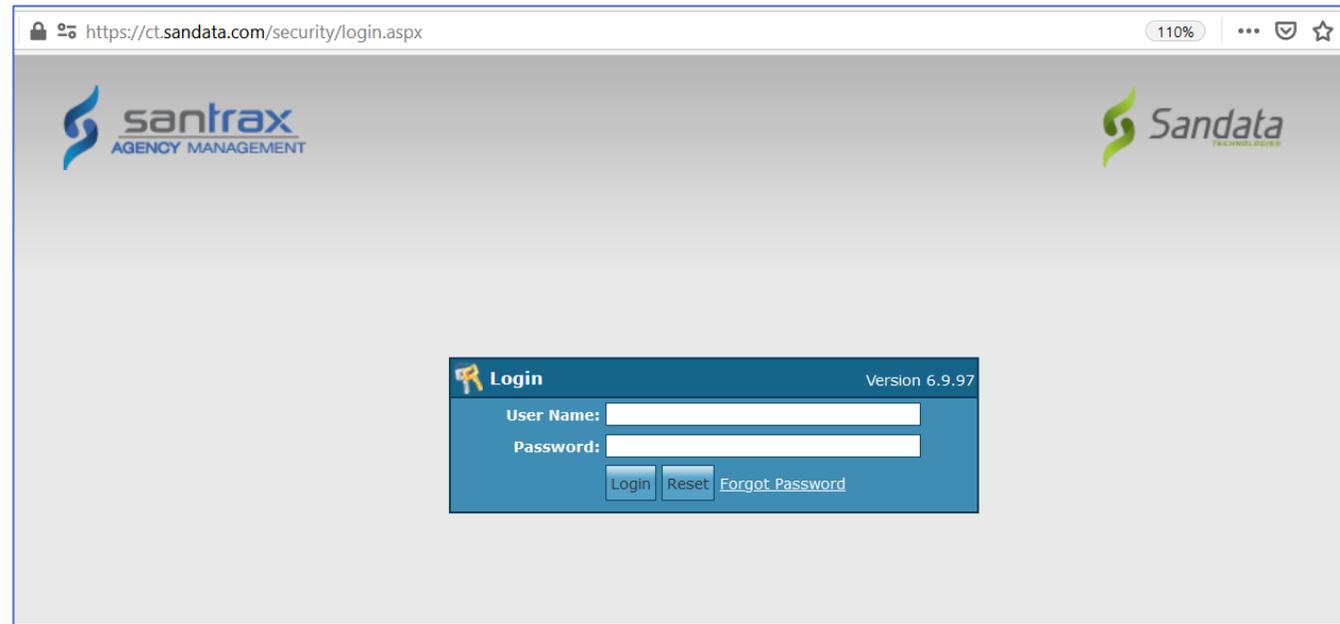


- Use the launch window as the URL to set a Bookmark (Firefox) or Favorite (Internet Explorer)
- This window can be closed once the login screen opens.



# Logging In

- ▶ The second is the dedicated Santrax Payor Management application login window



The screenshot shows a web browser window with the URL <https://ct.sandata.com/security/login.aspx>. The page features the Santrax Agency Management logo on the left and the Sandata logo on the right. In the center, there is a blue login form titled "Login" with "Version 6.9.97" in the top right corner. The form contains two input fields: "User Name:" and "Password:". Below the fields are three buttons: "Login", "Reset", and "Forgot Password".

- ▶ Passwords are case sensitive:
  - Passwords must be at least 8 characters in length and contain a capital letter, number and special character



# Pop Up Blockers

If the application login window does not open, check to confirm that pop-ups are allowed for the URL: `.sandata.com`



# Home Page

The screenshot displays a software interface for a training account. At the top, a navigation bar includes menu items: Client, Staff, Scheduling, Billing, Payroll, Reports, and Help. The user is logged in as 'Wonka, Will' with a 'Logout' option. The main header identifies the user as 'Training Account 8450' and shows the date 'Activities For Wednesday, Mar 24'.

The interface is divided into several sections:

- My Schedules:** A table showing activities for Wednesday, Mar 24. The table has columns for Client, Service, IN, Hrs, Miles, and Status.
- Messages and Notifications:** A section containing a 'Message of the day' and a 'Notifications' area.
- My Documents:** A section with tabs for 'Authorization' and 'My Notes', and a table with columns for Document, Owner, V, and Status.

Client	Service	IN	Hrs	Miles	Status
Bartlett, Jed	HHA	10:36	1.00	0.00	09-Hold
Bartlett, Jed		12:32	0.00	0.00	09-Hold
Brady, Wayne	HHA	10:00	3.00	0.00	09-Hold
		11:04	1.00	0.00	09-Hold
		11:20	1.00	0.00	09-Hold
		12:50	1.10	0.00	09-Hold
		12:05	1.08	0.00	09-Hold
		13:53	0.95	0.00	09-Hold
		13:18	0.87	0.00	09-Hold
		14:42	1.00	0.00	09-Hold
		09:45	1.08	0.00	09-Hold

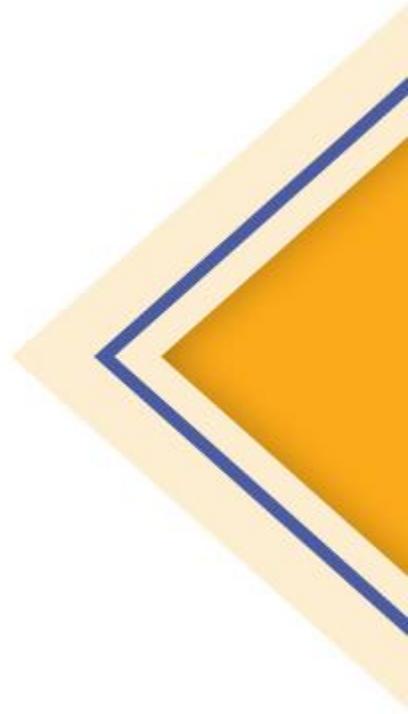
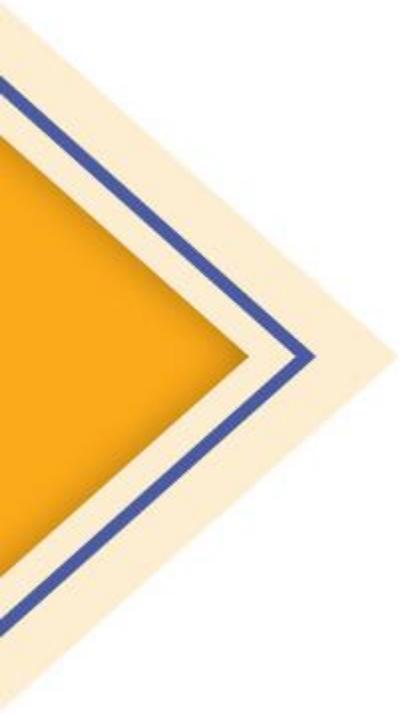
**Message of the day.**  
Welcome to Training! We hope everyone has a great time learning.

**Notifications**

Document	Owner	V	Status
----------	-------	---	--------



# ONLINE DOCUMENTATION



# Documentation Library

- ▶ Help Menu opens the Sandata Universal Documentation Library
- ▶ Provides application documentation, not program specific documentation
- ▶ The first time you access the Help menu for the day, the system will prompt for a username and password
  - Username: samtraining
  - Password: radiant26



# Using the Documentation Library

- ▶ The Library contains PDF documents organized by module
- ▶ Documents can be printed or saved to local computer if needed

The screenshot displays the Sandata SAM Universal Documentation Library. At the top left is the Sandata SAM logo. To the right is a search bar labeled 'ON PAGE SEARCH'. Below the header is the title 'Universal Documentation Library' with a green plus icon. A green bar labeled 'HELPFUL HINTS' is followed by a grey bar labeled 'SECTION FILTER'. A dropdown menu is visible below the filter. The main content area lists several PDF documents: 'RELEASE NOTES', 'GLOSSARY', '2019 PREVIOUS RELEASES', '2019 RELEASE SCHEDULE', 'SYSTEM REQUIREMENTS', 'QUICK TAB REFERENCE GUIDE', and 'FREQUENTLY ASKED QUESTIONS AND ANSWERS'. At the bottom, a green bar labeled 'NAVIGATION/GENERAL DOCUMENTS' contains a 'Login INSTRUCTIONS' section with a 'Login' button and the text 'LOGGING INTO THE APPLICATION', and a 'MANUAL' link with a PDF icon.



# Connecticut EVV Page

As documentation specific to Connecticut EVV Program is created, it will be available on the Connecticut DSS website:

[www.ctdssmap.com](http://www.ctdssmap.com)

**Important Messages**

[Hospital Monthly Important Message \(Posted 11/12/18\)](#)

[Electronic Visit Verification Implementation Important Message \(Updated 11/9/18\)](#)

[Revised Provider Manual Chapters \(Updated 11/2/18\)](#)

[Reporting NDC Reminder \(Posted 10/24/18\)](#)

[Attention Behavioral Health FQHC Providers: Elimination of Co-payments for Behavioral Health Services Rendered to HUSKY B Members \(Posted 10/10/18\)](#)

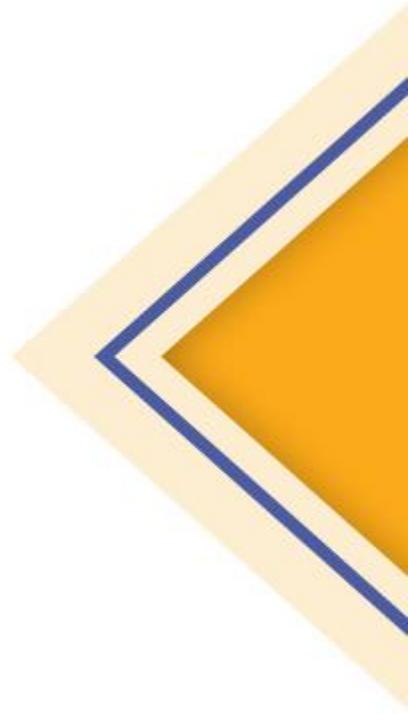
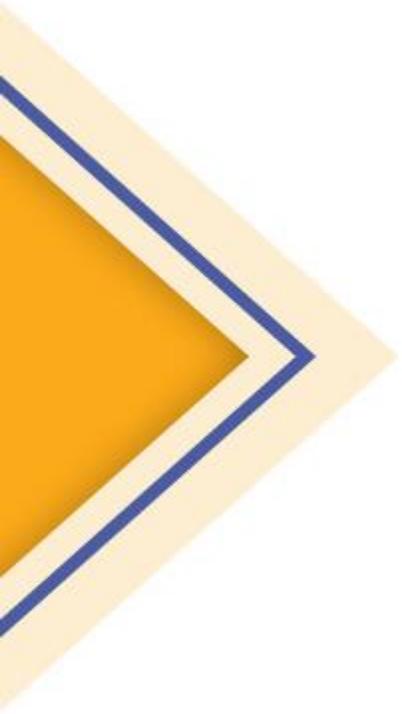
[EHR Incentive Program Name Change \(Posted 9/17/18\)](#)

[HUSKY Health Primary Care Payment Program Extension Notification \(Posted 11/30/17\)](#)

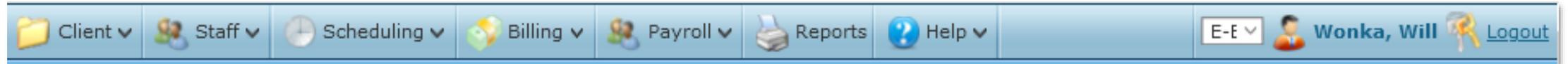
[Click here for Archived Messages](#)



# Common Elements



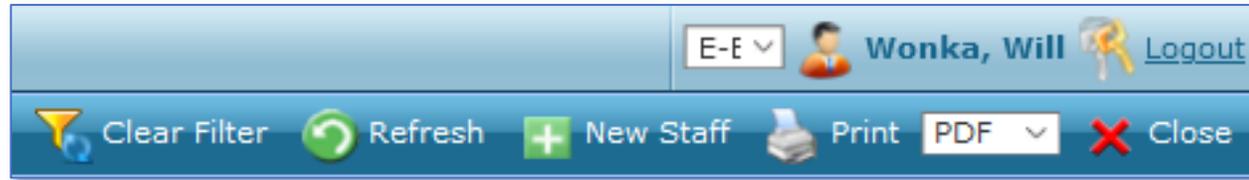
# Menu Bar



- ▶ Allows access to the major system modules and is displayed throughout the application
- ▶ Only display's functions the user has permission to access
- ▶ The current time zone setting and username of the current user is displayed on the right
- ▶ Clicking the username opens the user profile, allowing the user to change their password



# Tool Bar



- ▶ The Toolbar is the blue bar located at the top of the screen below the Menu Bar
- ▶ Appears to the right of the Screen Title, once a menu (Client, Staff, Scheduling, etc.) is selected
- ▶ Actions available are specific to the module screen



# “Breadcrumbs”



- ▶ Appears at the bottom of every screen
- ▶ Listing of all open screens accessed by user
- ▶ Quick navigation to previously viewed information
- ▶ Home screen always appears as the first item on the **Go To** bar as a shortcut back to the homepage



# Search Functionality

Search is consistent throughout the application and is divided into 3 parts:

For Agency Management screens:

- ▶ *Staff*
- ▶ *Client*
- ▶ *Scheduling*
- ▶ *Billing Review*
- ▶ *Invoice*
- ▶ *Billing Export*
- ▶ *Payroll Review*

**Search Filters: Specify Criteria**

**Summary Bar: Count Items in the Results**

**Results List: Details of Items**



# Example – Client Search

Client Search
Clear Filter Refresh New Client Print PDF Close

**Search Filters**

Company: <input type="text"/>	First Name: <input type="text"/>	Clinical Manager: <input type="text"/>	Service: <input type="text"/>
Location: <input type="text"/>	Last Name: <input type="text"/>	Staff Manager: <input type="text"/>	Address: <input type="text"/>
Admit Type: <input type="text"/>	Language: <input type="text"/>	Marketer: <input type="text"/>	City: <input type="text"/> State: <input type="text"/>
Team: <input type="text"/>	ID: <input type="text"/>	Coordinator: <input type="text"/>	ZIP: <input type="text"/>
Status: <input type="text" value="02- Active"/>	SSN: <input type="text"/>	Payor: <input type="text"/>	<input type="text" value="03/24/2021"/>
Reason: <input type="text"/>	MRN #: <input type="text"/>	Payor No: <input type="text"/>	

Mutual Clients:

Active with Active Authorizations  
 Active with No Active Authorizations Past Selected Date  
 Invalid Address - No GPS Coordinates Available  
 Non-Compliant Clients

Summary

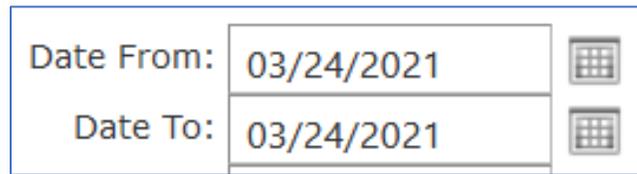
Total Shown: 295 As Of: 01:42 PM

Name	Coordinator	Chart ID	Status	As Of	SOC	EOC	Other ID	Compliant Through	Referrer	Last Scheduled Visit Date	Last Authorization End Date	Services
A, Client	Green, Mary	NYC-0201556-COM	02	08/13/2018	08/13/2018			12/31/2055		04/09/2021	12/31/2020	
Abduleta, Paula		NYC-0201523-MCD	02	11/27/2017	11/27/2017			12/31/2055		04/08/2021	09/30/2021	, 11HC, 17C
Acadia, Morgan	Brown, Jenny	NYC-0201596-COM	02	12/01/2019	12/01/2019			12/31/2055		04/09/2021	12/31/2020	11HC, HHA
Aranda, Ned		DAL-0201482-SCB	02	08/18/2014	08/01/2014		201482	12/31/2055		11/25/2019	07/25/2020	11HC, 17C,
B, Client	TestUser, Rosanna	NYC-0201557-OXF	02	08/20/2018	08/20/2018			12/31/2055		04/09/2021	12/31/2018	
Barker, Kyle		NYC-0201623-MCD	02	03/31/2020	03/31/2020			12/31/2055		04/09/2021	06/30/2020	HHA
Bartlett, Jed	Wonka, Will	NYC-0201540-MCD	02	05/01/2018	05/01/2018			12/31/2055		04/09/2021	03/31/2021	, 11HC, HH,
Bates, Jimmy		NYC-0201615-MCD	02	02/24/2020	10/08/2018			12/31/2055		04/10/2021	03/31/2021	11HC, HHA
Bates, Monica		DAL-0201428-SCB	02	08/18/2014	08/01/2014		201428	12/31/2055				11HC, 17C,
beard, James		NYC-0201663-MCD	02	09/18/2020	09/18/2020			12/31/2055		04/09/2021	02/28/2021	HHA
Bedna, David		DAL-0201449-SCB	02	04/26/2017	04/26/2017		201449	12/31/2055		04/09/2021	07/27/2018	11HC, 17C,
Bednar, Larry		DAL-0201460-SCB	02	08/18/2014	08/01/2014		201460	12/31/2055				11HC, 17C,

Results

# Entering Dates

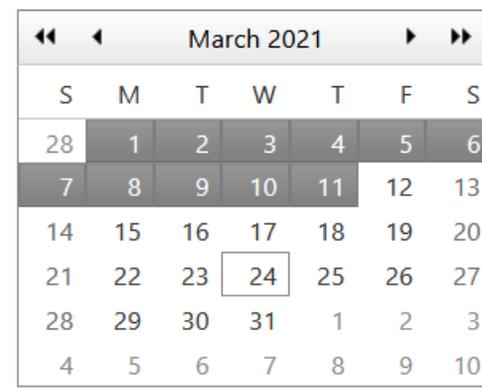
- ▶ Enter the date directly into the **From** and **To** fields
  - Format must be in mm/dd/yyyy
- ▶ Use the calendar icon next to the Date field to choose the date



Date From: 03/24/2021

Date To: 03/24/2021

- ▶ Use the larger Calendar to select a date or enter a date range
  - Select the 'Date From'
  - Hold Shift Key + click the 'Date To'

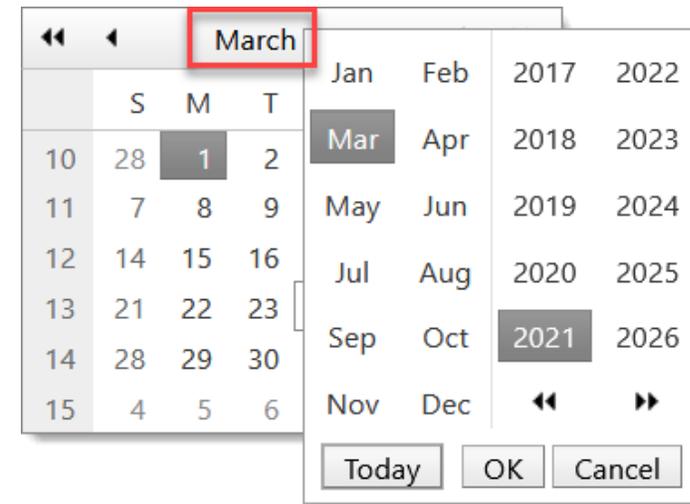
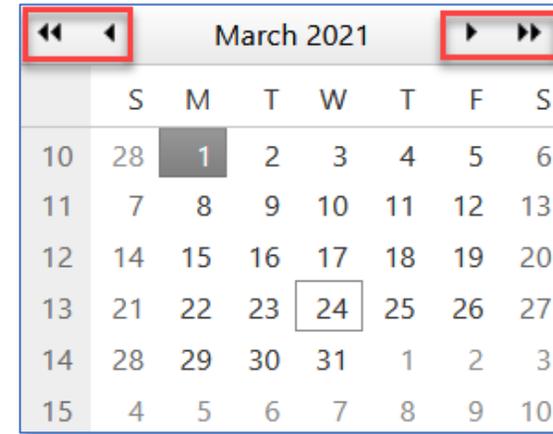


March 2021						
S	M	T	W	T	F	S
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10



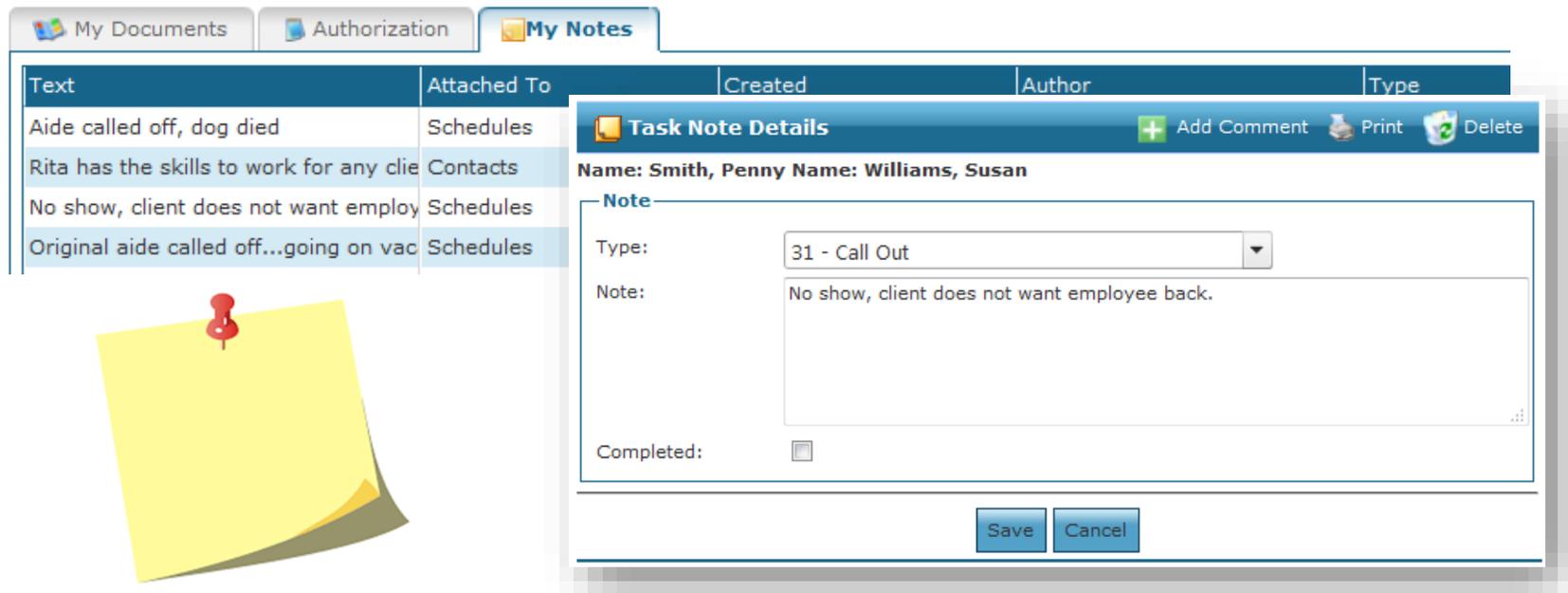
# Calendar Controls

1. On either side of the month are single and double arrows
  - ▶ Single arrows advance one month at a time
  - ▶ Double arrows advance one year at a time
2. Clicking the month name allows the user to type in the year and select the month



# Notes

- ▶ Notes can be created in Staff, Client and Schedule records
  - Can be marked completed or left open for follow up
- ▶ From the bottom panel on the **Home Screen > My Notes** tab, a user will see their 'open' notes



The screenshot displays a software interface with a 'My Notes' tab. A table lists notes with columns for Text, Attached To, Created, Author, and Type. A 'Task Note Details' dialog box is open, showing a note with Type '31 - Call Out' and text 'No show, client does not want employee back.' The dialog includes a 'Completed' checkbox and 'Save' and 'Cancel' buttons. A yellow sticky note icon is also visible.

Text	Attached To	Created	Author	Type
Aide called off, dog died	Schedules			
Rita has the skills to work for any clie	Contacts			
No show, client does not want employ	Schedules			
Original aide called off...going on vac	Schedules			

**Task Note Details** + Add Comment Print Delete

Name: Smith, Penny Name: Williams, Susan

**Note**

Type: 31 - Call Out

Note: No show, client does not want employee back.

Completed:

Save Cancel



# Action Buttons



▶ Clear Filters – removes previously entered filter criteria



▶ Refresh – run search/refresh the screen



▶ Add – add information to that area of the screen



▶ Delete – delete selected information

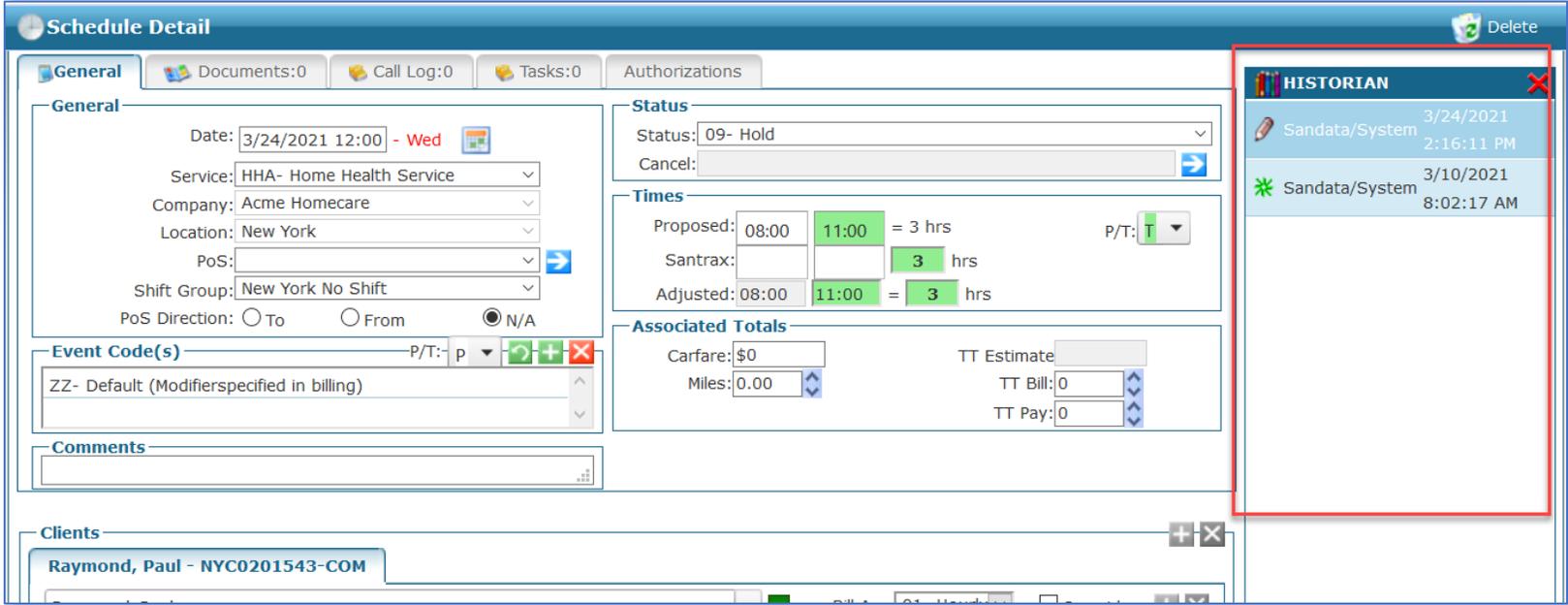


▶ See All Options – view all choices for the field



# Historian

- ▶ Audit Trail of changes made by: user, date & timestamp
- ▶ Clicking a historian entry will highlight the values saved in that instance
- ▶ Call times are logged as: Santrax interface

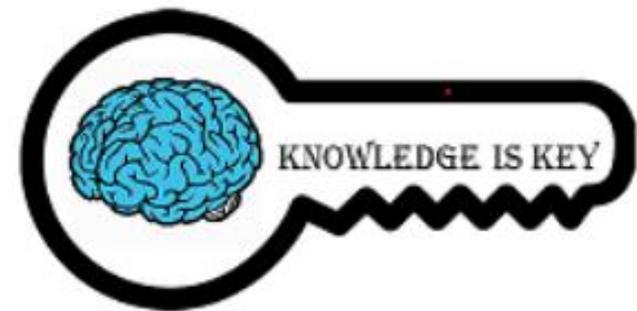


The screenshot displays the 'Schedule Detail' window in the Sandata system. The main window is divided into several sections: 'General' (containing date, service, company, location, PoS, and shift group), 'Status' (with a dropdown menu), 'Times' (showing proposed and adjusted call times), 'Associated Totals' (with fields for carfare, miles, and estimates), 'Event Code(s)', 'Comments', and 'Clients'. A 'Delete' button is visible in the top right corner. A 'HISTORIAN' window is open on the right side, listing two entries: one from 3/24/2021 at 2:16:11 PM and another from 3/10/2021 at 8:02:17 AM, both attributed to 'Sandata/System'. The 'HISTORIAN' window has a red border and a close button in the top right corner.



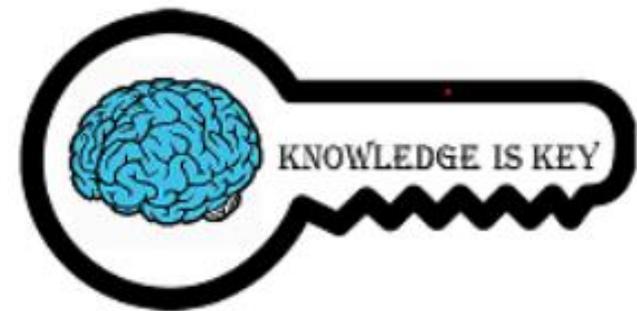
# What have we learned?

- ▶ Santrax® Agency Management (SAM) minimum system requirements; web based and supported by Chrome, Firefox, Microsoft Edge and Internet Explorer 11
- ▶ Login and Password requirements:
  - Passwords are case sensitive
  - Password minimum length is 8 characters and must contain capital letter, number and special character

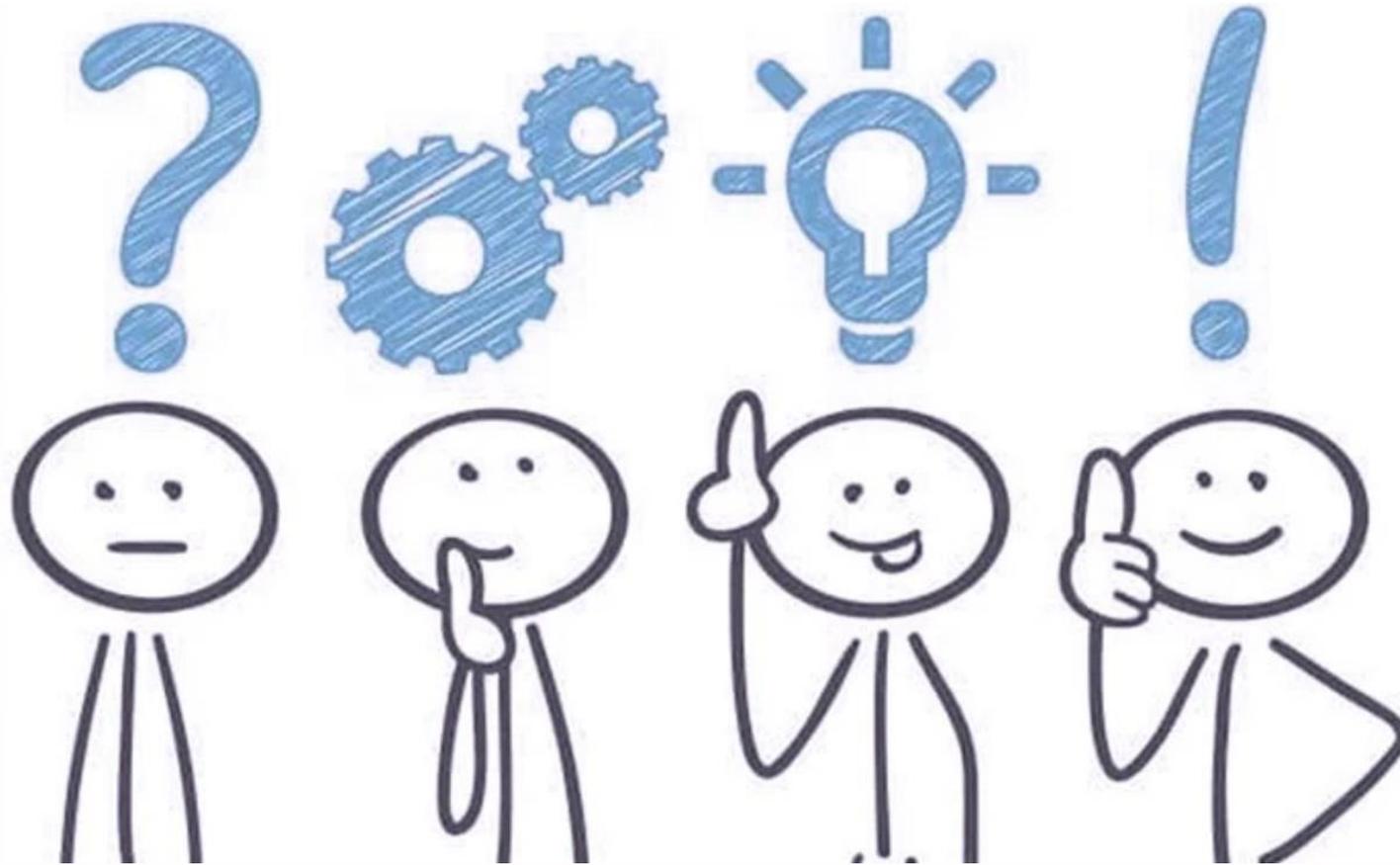


# What You Have Learned

- ▶ How to access the documentation online:
  - Sandata Universal Documentation Library
  - Username & password needed the first time each day to access
- ▶ Common System functionality including:
  - Menu Bar
  - Tool Bar
  - Breadcrumbs
  - Search, Date Entry
  - Calendar controls
  - Notes
  - Action buttons
  - Historian



# Questions...



# How to Stay Connected

We look forward to working with you.

Please do not hesitate to reach out with questions, comments or suggestions.

## Website

[www.ctdssmap.com](http://www.ctdssmap.com)

## Email

[ctcustomer@sandata.com](mailto:ctcustomer@sandata.com)

## Telephone

(855) 399-8050

