



## EVV Phase 3 Agency Training Information

Training Registration will open on **September 15, 2020** for Phase 3 of the Ohio Department of Medicaid (ODM) Electronic Visit Verification (EVV) initiative. Phase 3 training will begin on October 5, 2020. Today we are sending you an overview of Phase 3 training. Please review the [ODM webpage](#) for a description of phases, services, timelines and other resources.

### **Phase 1 and Phase 2 Providers**

If you are currently using Sandata EVV or have taken Sandata EVV training already, there will be a bridge training for providers to understand the EVV system changes for Phase 3. These changes will be made to the system on September 1, 2020. Bridge training will be offered as both an instructor-led webinar and a self-paced training course.

**Note:** Bridge Training Registration (for P1 and P2 providers) is August 10, 2020. Phase 3 Training is September 15, 2020.

Providers who have already taken training in a previous phase may log into their existing Sandata Learning Management System (LMS) account as of August 10, 2020 to register for the instructor-led bridge training webinars. Both instructor-led webinars and self-paced bridge training will be available on August 24, 2020. More information regarding the bridge training has been sent to you through a separate email.

If you have not taken EVV training for Phase 1 or Phase 2, you must take the full EVV training.

### **Phase 3 New Provider Training**

ODM is taking a new approach to EVV training in Phase 3 based on feedback from providers in prior phases. In Phase 3, you can access the EVV system after one agency representative completes the initial modules. After one agency representative takes two short required courses in the Sandata LMS, you will receive a link to your Welcome Kit with your initial EVV login credentials. The required courses are:

Course	Duration	Content Overview	Intended Audience
Overview	60 mins	This course supplies an overview of the modules in the Sandata EVV system. The course covers login requirements, common elements, and functionality available throughout the system, an explanation of the different modules, and a description of the information available within each module. It also includes an introduction to finding and running standard reports available in the Sandata EVV system.	Designated Agency representative/Security Administrator
Security	40 mins	This course covers how users are added, managed, and deleted from an Agency's EVV account. Agency providers need this course to set up administrative users who will manage the Agency's EVV portal account.	Designated Agency representative/Security Administrator

After taking these initial courses in Sandata's LMS, you will also receive weblinks that you and other agency staff can use to take additional EVV system training. ODM recognizes that agency providers may have different people in distinct roles of their organization who will use the EVV system.

Phase 3 EVV training is role-based. Training topics are broken into shorter courses that can be taken separately by agency staff members who need each course. All Phase 3 EVV training will be conducted remotely. Training options that will be available for registration by agency staff include:

**Independent Web-Based Training:**

This online, self-paced training method allows participants to access training materials independently. These self-paced courses cover each module of the EVV system and are available 24-hours a day, 7 days a week for the life of the program. Independent Web-Based Training can be a great resource as a refresher or a way to train new staff.

**Instructor-Led Web-Based Training:**

Also known as webinars, these courses cover each module of the EVV system. Participants will register for the desired webinar courses and attend from a remote location, using their own computer with internet access. Participants can listen to the webinars either by calling in by phone or through computer audio.

The courses offered include:

Courses Available	Duration	Content Overview	Intended Audience
Overview	60 mins	This course supplies an overview of the modules in the Sandata EVV system. The course covers login requirements, common elements, and functionality available throughout the system, an explanation of the different modules, and a description of the information available within each module. It also includes an introduction to finding and running standard reports available in the Sandata EVV system.	Office staff
Security	40 mins	This course covers how users are added, managed, and deleted from an Agency's EVV account. Agency providers will need this course to set up administrative users who will manage the Agency's EVV portal account.	Designated Agency representative/Security Administrator
Data Entry	60 mins	This course explains how to search for, create, edit, and deactivate client and employee (caregiver) records in the Sandata EVV system.	Office staff
Visit Capture (SMC, TVV)	30 mins	The course walks through the process a caregiver uses to start and complete a visit using mobile and telephony visit verification methods.	Office staff and caregivers
Visit Maintenance	90 mins	This course provides a detailed review of the Visit Maintenance module. It explains how to use the available filters to review visit data, the visit exceptions, and how to clear or resolve each exception. The user also learns how to perform	Office staff

		visit maintenance and how to manually create and edit visits.	
Group Visits	45 mins	This course explains how a caregiver starts and completes a group visit using mobile and telephony visit verification methods. The course also explains how group visit information is viewed in Sandata EVV.	Office staff and caregivers

**NOTE:** If agency providers would like their caregivers to be able to view the Visit Capture or Group Visit webinars, an agency administrative user must register for the webinar and then provide the webinar information to the caregiver(s).

You will receive more information including registration links when **registration opens on September 15, 2020**. If you have any questions on registering for training, or regarding any of the other actions to be ready for go-live, call the EVV Provider Hotline at (855) 805-3505. If you have general EVV questions, email the EVV Unit at [EVV@medicaid.ohio.gov](mailto:EVV@medicaid.ohio.gov).

Thank you for your participation in the EVV program.