



## What is Electronic Visit Verification (EVV)?

From the State of Wisconsin EVV website <https://www.dhs.wisconsin.gov/evv/index.htm> “EVV is an electronic system that uses technologies (i.e. Sandata) to verify that authorized services were provided. Workers will be required to send information at the beginning and end of each visit to an EVV system, including:

- Who receives the service
- Who provides the service
- What service is provided
- Where the service is provided
- Date of service
- Time in and out”

**When you go to work**, each employee should only punch in and out on his/her own Sandata (EVV) account using the following information:

- **Company Code 2-91620**
- **Client ID** (should be on their refrigerator; if you cannot find it call the office 414-475-5356 and ask for the Client ID number; have the client add it to their refrigerator for future use)
- Your **username** (email address) and **password**.
- Times punched must reflect active worktime when an employee is starting or ending work. If you are not following the schedule, you must report the schedule change to the office so that the schedule is approved and updated accordingly.
- **GPS locations must be enabled in Sandata (SMC). Disabling of GPS locations in Sandata is not acceptable. Submission of EVV work punches without GPS data is a terminable offense.**

See the Videos on Wisconsin DHS website: <https://www.dhs.wisconsin.gov/evv/index.htm>

*Videos include: Initial Set up and Credentials, Starting a Visit, Completing a Visit with Tasks and Client Verification, Starting a Group Visit*

## How to Download Sandata (EVV) Application

### On iPhone

1. Locate the **App Store**  
Tip: The symbol is a blue A
2. When in App Store, at the bottom right corner there is a *search options*
3. *Search* “**Sandata Mobile Connect**”
  - a. It should be the app with a yellow bar and blue arrow symbol.
4. *Install* Sandata app.
5. Open app and **allow locations services** “while using the app.”

### On Android/Google Phone

1. Locate the **Google Play Store**,  
TIP: If you cannot find it, scroll from bottom to top to find all the apps on your phone. The symbol is a colorful arrow, on the home screen.
2. Once in play store, at the top is a search bar. *Search* for “**Sandata Mobile Connect**”
3. The app has a yellow bar and blue arrow symbol.
4. *Install* Sandata app.
5. Open app and **allow locations services** “while using the app”

## Supportive Homecare Options, Inc.

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Company Code: 291620

Username:

Password:

Client ID:

### Instructions for Starting Electronic Visit Verification (EVV)

1. **You need a smart phone or smart device (such as a tablet that can connect to Wi-Fi).** If using a smart phone, it **MUST** be either an iPhone or an Android in order to be able to run the Sandata Mobile Connect (SMC) app. (See below.)
2. **You need a phone data plan or access to Wi-Fi –**
  - a. When using data plan: the Sandata Mobile Connect (SMC) app will not use significant amounts of your data plan so you need not worry about exceeding your plan limits when using this app. You are free to choose a data plan that fits your personal needs and budget.
  - b. Alternatively, if you rely on Wi-Fi, the SMC app can record your punches with GPS data and upload them next time your device connects to Wi-Fi.
3. **You need an email account –** depending on your smart phone choice there are two simple paths to make email available on your smart phone. If you already have an email account you may use that. You are free to use whatever email account you choose. Here are some simple suggestions if you are new to email:
  - If you have an Android phone use Gmail. **How to Use Gmail: Get Started With Your New Gmail Account:** <https://www.lifewire.com/how-to-use-gmail-1172005>
  - If you have an iPhone use iCloud email. **How to Create an iCloud Email:** <https://www.lifewire.com/how-to-create-an-icloud-email-4584873>
4. **If you haven't already, inform SHO of your email address** - information you need to use the Sandata Mobile Connect (SMC) app is sent to this email address. Your email address is also your username when using SMC. You can easily let the office know your email address in two ways: Update your Paylocity account with your personal email address (preferred) or by sending an email to [SHO@shoinc.com](mailto:SHO@shoinc.com) with subject "EVV". Include your legal first and last name in the email so the office may correctly create your SMC account.
5. **Check periodically for the email from Sandata –** you will need this to create the necessary account and to log on to Sandata Mobile Connect (SMC).

*Once you have your Information for Sandata Login:*

1. **Install the Sandata Mobile Connect (SMC) app on your phone** - the app is available on the Apple App Store for iPhones and the Google Play Store for Android phones. The app can easily be found by searching for "Sandata Mobile Connect".  
For iPhones: <https://www.dhs.wisconsin.gov/non-dhs/dms/downloading-evv-smc-app-ios.pdf>  
For Androids: <https://www.dhs.wisconsin.gov/non-dhs/dms/downloading-evv-smc-app-android.pdf>
3. **Log in to SMC for the first time with the company ID (2-91620), username (your email address) and password you received in the introductory email.** You will be asked to enter some security questions and create a new password. Passwords are case sensitive, must be at least 12 characters long, have at least one upper case letter, one lower case letter, one numeric character and one special character.
3. A short video explaining how to log on the first time is found here.  
<https://livestream.com/dhswebcast/events/9258488/videos/210107814>

**\*\*Disabling GPS Locations in Sandata is not acceptable. Submission of EVV work punches without GPS data is a terminable offense.\*\***

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Note: The Sandata application is sometimes referred to as SMC (Sandata Mobile Connect). Sandata or SMC are the same; they are used for Electronic Visit Verification (EVV) to record worktimes.

## How to Record Worktimes Using Sandata (EVV)

### Instructions for Using Sandata (EVV) App

Note: you have 15 minutes before and after your shift's start time/end time to clock in or out while still being on time. If you need to change your scheduled work time, make sure to call SHO and get it updated prior to working.

#### Starting a Visit / Punching in

Once logged in...

1. Enter your Client's **six digit EVV number** into the search bar and click search.
2. When your Client appears, **Start Visit**
3. Select **Supportive Homecare/15min** by clicking the bubble on the far right side
4. Select **CONTINUE**
5. Select **YES** to start visit

*You are now clocked in.*

#### Completing a Visit / Punching out

Once logged back in...

1. Select **Resume Visit**
2. Choose all tasks that you completed
3. Tap **Complete Visit**
4. Tap **Complete Visit**
5. Tap **Confirm**

Client Verification- Pass Phone to Client

6. Tap **continue** to have your client verify the service complete
7. Select **language**
8. Select **confirm** to confirm the time of clocking in and out and the service you completed.
9. Tap **continue**
10. Tap **confirm** to the confirmation summary
11. Client will use SIGNATURE or VOICE RECORDING, which ever works best.

Pass phone back to Caregiver

12. Tap **submit** to submit the punch
13. Tap **continue** to verify the punches

*You are now clocked out. The Application will return to the Log-in Screen.*

#### Resetting Password:

Password resets are done automatically every couple of months or with too many failed password attempts. Passwords can be reset through the EVV App

1. Passwords can be reset through email or by answering security questions
2. Request password reset via email. Check your email for a message from "Mobile... "
3. Use the temporary password in **BOLD** to log into the EVV app.
4. Once you log in, you will be prompted to change your password.
  - Passwords must be 12 characters
  - Uppercase
  - Lowercase
  - Number and a special character (ex: @ ! # \$ % ? )
  - It cannot have a similar word or phrase that is in your email username.

#### **\*\*IMPORTANT\*\***

- **Missed punches must be reported within 24 hours. They may be reported to 414-475-5356.**
- **Disabling GPS Locations in Sandata is not acceptable. Submission of EVV work punches without GPS data is a terminable offense.**

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