SANDATA ELECTRONIC VISIT VERIFICATION (EVV): EMPLOYEE DATA ENTRY
OBJECTIVES

After completing this lesson, you will be able to:

- Search for an employee
- Add an employee record
- Update an employee record
- Delete/close an employee record
## KEY TERMINOLOGY

<table>
<thead>
<tr>
<th>Term/Acronym</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Client</td>
<td>A person who receives services through the Medicaid program</td>
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<tr>
<td>Employee</td>
<td>A person who is employed by an agency provider to provide care to one or more clients</td>
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</tbody>
</table>
ACCESSING DATA ENTRY

- The Data Entry module allows system users to maintain client and employee records.
- A system user with the appropriate permissions will see the Data Entry link listed in the Navigation panel on the left side of the screen.
- Clicking on the link will expand the section to show Client and Employee options.
SEARCH FOR AN EMPLOYEE
1. Click **Data Entry > Employees** from the Navigation panel. The **Data Entry / Employees** search screen displays.
2. Enter values either in the **EMPLOYEE ID**, **EMPLOYEE FIRST NAME** or **EMPLOYEE LAST NAME** field, or a combination of the three (3).

3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.

If multiple search values are entered, Sandata EVV attempts to match against all exact values entered. Searching with no criteria selected displays a complete list of all active clients.
CREATE NEW EMPLOYEE(S)
1. Click CREATE EMPLOYEE. The Create Employee screen opens.
2. Enter **FIRST NAME, LAST NAME, SOCIAL SECURITY #** and **EMAIL ADDRESS** (Required).

The Santrax ID is automatically created by the system upon saving the employee record. The SANTRAX ID is entered by the employee as their unique ID for EVV Telephony calls.
3. Enter employee’s Primary Address (Optional).

Primary Address

ADDRESS LINE 1
Enter Address Line 1

ADDRESS LINE 2
Enter Address Line 2

CITY
Enter City

STATE
Select

ZIP CODE 00000-0000
Enter Zip Code
CREATE NEW EMPLOYEE(S)

4. Enter employee’s PHONE NUMBER (Optional).

![Phone Number input field]

Phone Number

PHONE NUMBER (000) 000-0000

Enter Phone Number
5. Enter the Employment information. The **MOBILE USER** checkbox must be checked in order for the system to create a temporary password for the employee to use the device to call-in/call-out.
6. Click **SAVE**. The Save Confirmation dialog box displays.

7. Click **OK**.

If the MOBILE USER checkbox is not selected, Sandata EVV displays a reminder.
MODIFY/DELETE/REACTIVATE EMPLOYEE
MODIFYING EMPLOYEE DATA

- Modifying a client’s data allows updates to the information, as necessary.
DELETING EMPLOYEES

- Terminating an employee makes the record inactive. Employees cannot be terminated with a future date.
- Any activity already captured will continue to reference the employee’s previous information. Once an employee is terminated, no activity will be allowed on that employee record, including call-in and call-outs or employee record modifications.

Terminating an employee is not retroactive.
DELETING EMPLOYEES

1. Search for the employee.
2. Click Terminate (🗑️) to the right of the selected employees name. The Terminate Confirmation dialog box displays.
3. Click TERMINATE. A successful confirmation displays.
1. Search for a client with the status of Inactive.

2. Click Reactivate to the right of the selected client’s name. The Reactivate Client confirmation dialog box displays.

3. Select a **REACTIVATE DATE**. The date defaults to the current day’s date. A client can be reactivated up to the date they were originally deleted.

4. Click **SAVE**. A successful confirmation dialog box displays.
QUESTIONS...