



Electronic Visit Verification (EVV) Supplemental Training Guide

December 2025
V4.3



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			<ul style="list-style-type: none"> Scheduled Reports In-App Messaging 	
3.2	5/6/22	B. Parker	Added: Service Code Update	10-11
	5/6/22	B. Parker	Added: Armenian Language	11
	5/6/22	B. Parker	Deletion of Reason Codes 140 and 220	14
	5/6/22	B. Parker	Renaming of Reason Codes 150, 160, 170	14
3.3	5/26/22	A. Lowry	Updated with Department Edits	
3.4	7/1/22	A. Lowry	Change Request: Hide Client and Employee SSN Address from Data Entry Screen, unauthorized service exception	4-6, 7, 12
	7/1/22	A. Lowry	Change Request: Additional Payer/Program/Services to PCS (DHCS / MCPs)	4-6
	7/1/22	A. Lowry	Employee ID vs. Employee Other ID	4-6
	7/22/22	Sam/Training	Edits applied throughout	
3.5	8/1/22	A. Lowry	HHCS version: Edits throughout and updated service list for HHCS, added DDS additional Services, and helpful hints for required payer field.	8-9, 13
3.6	8/23/22	Angie Lowry	Updated Service List description 600-605	10-11
3.7	11/4/22	M. Cavallo	Updated Service List Home and Community Based Alternative/Waiver and Personal Care Services	10-11
3.8	1/9/23	M. Cavallo	Updated Service List for In-Home Supportive Services (IHSS)	10-11
3.9	2/9/23	M. Cavallo	Updated Payer List for Community-Based Adult Services (CBAS)	5-7
4.0	4/6/23	M. Cavallo	Covered Services and Visit Service Selection (Telephonic)	10-13
4.0	4/6/23	M. Cavallo	Updated Helpful Hints When Using the CalEVV Portal	4-5
4.1	10/26/23	M. Cavallo		

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4.2	07/18/25	C. White	Edited Visit Capture Using the Mobile App 2 link and removed duplicate	18
4.3	12/12/25	D. Le	Formatting updates applied throughout guide to support state and federal ADA requirements.	All

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Purpose/Overview

The Sandata EVV (Electronic Visit Verification) portal, Sandata Mobile Connect (SMC) mobile application, and Sandata Telephonic Visit Verification (TVV) applications have been configured to be unique for California. These collective components as configured for California, along with the configured Sandata Aggregator, are referred to as “CalEVV”. This Supplemental Guide provides specific information describing these CalEVV unique configurations as they pertain the users of these applications.

Terminology & Helpful Hints

CalEVV System Term	Definition	California Term
Client	<p>The recipient of care from a caregiver.</p> <p>Client data is manually entered in the CalEVV portal Data Entry module, Clients tab. Alternatively, Client data can be uploaded to the CalEVV portal using the Open EVV bulk upload process.</p>	Consumer, Recipient, Member, Participant, and Beneficiary
User	<p>An individual who has access to one of the CalEVV components (CalEVV portal, SMC, or TVV).</p> <p>In the CalEVV portal, portal users are added and maintained by an administrator through the Security module, Manage Users tab. Portal users are assigned to roles that determine their permissions and the features available to them, e.g., administrator, coordinator, assistant coordinator.</p> <p>Users of the SMC and TVV applications are identified by portal users in the role of Coordinators (office staff) through the Data Entry module, Employees tab.</p> <p>Creating an employee in the portal will result in an email sent to the employee with instructions for using the SMC or TVV to record visits. SMC and TVV users generally do not have access to the CalEVV portal.</p> <p>An exception is when an Individual Provider serves both functions of caregiver and office staff and will thus be both a user of the CalEVV portal as well as the SMC and/or TVV.</p>	Office staff

CalEVV System Term	Definition	California Term
Employee	<p>The individual (caregiver) who is directly in contact with the recipient of care and is providing the services to that recipient at the point of care. Employees do not generally have access to the CalEVV portal unless they are an Individual Provider.</p> <p>Employee data is manually entered in the CalEVV portal Data Entry module, Employees tab. Alternatively, Employee data can be uploaded to the CalEVV portal using the Open EVV bulk upload process.</p>	Caregiver, Direct Care Worker
Authorization	<p>Documentation for a provider that authorizes them to supply a specific amount of a documented service (or services) to a client over a defined period. Authorization of service is provided by the payer and is needed for a provider to be able to bill for that service. In California, authorization processes and documents are unique to the particular program.</p> <p>In CalEVV, authorizations are manually entered in the CalEVV portal Data Entry module, Client's tab, Client Payer segment. Alternatively, authorization data can be uploaded to the CalEVV portal using the Open EVV bulk upload process.</p>	e.g., Purchase of Service
Department	<p>Each Medi-Cal program in California is managed by one of the following departments:</p> <ul style="list-style-type: none"> • DDS – Department of Developmental Services • DHCS – Department of Health Care Services* • CDA – Department of Aging • CDSS – Department of Social Services • CDPH – Department of Public Health <p>* DHCS serves as the State Medicaid Agency and provides oversight for all Medi-Cal programs.</p>	Department
Payer	The term "Payer" refers to the organizational entity that pays the claim. In California Medi-Cal programs, claim	Department, Program

CalEVV System Term	Definition	California Term
	<p>adjudication and payment is often decentralized to local organizations referred to as “jurisdictional entities”. See “Jurisdiction” below.</p> <p>In CalEVV, the “Payer” is the program that defines the set of services and is managed at the state level and administered locally. The following Medi-Cal Payers or programs are subject to EVV requirements:</p> <p>CADDs California Department of Developmental Services programs</p> <p>CAHHA California Home Health programs delivered through Fee for Service or Managed Care</p> <p>CAHCBA California Home and Community Based Alternatives (HCBA) program</p> <p>CACCS California Children’s Services (CCS)</p> <p>CAMCWP California Medi-Cal Waiver Program (MCWP)</p> <p>CAMSSP California Multipurpose Senior Services Program (MSSP)</p> <p>CAIHSS California In-Home Supportive Services (IHSS)</p> <p>CACBAS California Community-Based Adult Services (CBAS)</p>	
Jurisdiction	<p>Jurisdiction refers to the organization or entity that manages, contracts, authorizes and/or pays for services to consumers and beneficiaries on behalf of a state department. Jurisdictions in CalEVV include Regional Centers, Managed Care Plans & DHCS, HCBA Waiver Agencies, Medi-Cal Waiver Agencies, MSSP sites, CCS Counties and IHSS County Offices:</p> <ul style="list-style-type: none"> CADDs – Regional Centers 	Jurisdictional Entity

CalEVV System Term	Definition	California Term
	<ul style="list-style-type: none"> • CAHHA – Managed Care Plans & DHCS¹ • CAHCBA – HCBA Waiver Agencies • CAMCWP – Medi-Cal Waiver Agencies • CAMSSP – MSSP sites • CACCS – CCS Counties • CAIHSS – IHSS County Offices • CACBAS – Managed Care Plans & DHCS¹ <p>In CalEVV, the Jurisdiction field will provide the Payer-specific list of jurisdictional entity organizations as a drop-down list for user selection. E.g., “Contra Costa County”.</p>	

¹ DHCS serves as the jurisdictional entity for fee for service claims.

Helpful Hints When Using the CalEVV Portal

The CalEVV portal has been configured specifically for the state of California. This section contains information to help you use CalEVV effectively. Please Note: Only fields with an asterisk are required for data entry in the CalEVV portal.

Security – Manage Provider Identifiers

- Provider agencies must be associated with each and every department and jurisdictional entity for whom they are providing services subject to EVV requirements.
- Use the following guidelines for Identifier Type and Identifier Number fields.
 - DDS Identifier: Type = Vendor ID
 - This is the same Vendor ID provided by the Regional Center.
 - It is one or two alpha characters followed by four or five numerals (six characters total).
 - If you do not know your Vendor ID, contact your regional center.
 - DHCS/CDA/CDPH Identifier: NPI (National Provider Identifier)
 - This is a 10-digit number issued by CMS.
 - For CDA/CDPH, if you do not have an NPI, please select and enter your EIN (TaxID)
 - EIN consists of 2 digits before the dash then 7 digits after the dash.
 - CDSS – Provider Identifier Type = Other, value = “1”.

Data Entry – Clients

- Client records are required and should be created prior to recording any visits.
- Use the following guidelines for what to enter in the Medicaid ID field:
 - If the services being provided are for programs managed by DHCS, CDA, CDSS, or CDPH, then enter the Client Identification Number (CIN). Format = 8-digit number + 1 letter (capitalized).
 - If the services being provided are for programs managed by DDS, then enter the Unique Client Identifier (UCI). Format = 7-digit number.
- Client Payer section is required.
 - Clients must be associated with the correct payer and jurisdictional entity in the Client Payer section of the client record for each service they receive.
 - This will link each client for which EVV data is being captured to the jurisdictional entity authorizing the service and will allow the jurisdictional entity to have access to that client’s visit data for the associated services.
 - As an added benefit, having updated authorizations in the client record will enable caregivers to quickly select an active service when using the SMC and prevent Unauthorized Service exceptions (please see definition below).

Data Entry – Employees

- Employee records are required and must be created prior to recording any visits.
- Employee Other ID field: agencies can choose to use an employee ID number in your agency management system (if you are using an agency management system).
 - If your agency management system does not have an employee ID number, you can use an alternate ID such as an employee payroll ID.
- It is recommended not to enter any part of an employee's social security number in this field.
- Social Security Number is not an allowable field

Schedule

- If a schedule has been created for a visit in the CalEVV portal, then the caregiver can easily start a visit with the correct service.

Visit Maintenance

- Visit Details screen – Memo field: inputting information here will permanently remain in the visit record and cannot be edited or deleted.
- Unauthorized Service exception – This exception occurs when the service does not match an active authorization from the client record. This exception can be cleared by either changing the service to one reflected in the Client Payer segment, or by adding a client Payer segment that reflects the authorized service. ***Please note, it can take up to 15 minutes to resolve this exception in visit maintenance.**
 - We recommend you enter your clients, payers, and services before entering the visits in the system.
- Services reflected in the EVV visit record must be the same as those billed. If services reflected in the EVV record do not match those billed, claims will not match on the back end and may trigger an audit.
- Hide Robo Calls – Calls with no client or employee will be hidden from visibility to providers in the Visit Maintenance screen.
 - The provider will no longer need to mark these types of calls as Omit because they are completely removed from the system.
 - The system will automatically do this when the call is recognized as a 'robo call'.

Covered Services and Visit Service Selection (Telephonic)

The table below lists the codes an employee enters during a telephone (TVV) call to identify the service. It also lists the service description displayed for selection in the Sandata Mobile Connect (SMC) app for a mobile visit check-in.

Service ID	Description	Service ID	Description
Community Based Adult Services			
901	S5136-CBAS-ERS PCS in the home; per diem	902	Q5001-CBAS-ERS HHCS in the home; per diem
California Children's Services			
600	G0156-CCS-Home health aide svcs, ea 15 min	607	S9124-CCS-INP-LVN nursing svcs, per hour
601	G0162-CCS-RN svcs eval/manage, ea 15 min	604	T1002-CCS-RN svcs, up to 15 min
602	G0299-CCS-RN svcs, ea 15 min	605	T1003-CCS-LVN svcs, up to 15 min
603	G0300-CCS-LVN svcs, ea 15 min	608	T1030-CCS-INP-RN nursing svcs, per diem
606	S9123-CCS-INP-RN nursing svcs, per hour	609	T1031-CCS-INP-LVN nursing svcs, per diem
Home And Community Based Alternative Services			
400	S9122-HCBA Home health aide	404	T2017-HCBA Habilitation in the home
401	S9123-HCBA Nursing care in the home RN	104	T1019-HCBA WPCS in the home
402	S9124-HCBA Nursing care in the home LVN	565	S5111-HCBA-Home care training, family, per hour
403	T1005-HCBA Respite care in the home		
In-Home Supportive Services			
900	IHSS Provider Personal Care Services		
Medi-Cal Care Waiver Program			
101	S5130-MCWP-Homemaker services	112	G0299-MCWP-Skilled nursing/RN, ea 15
111	G0156-MCWP-Home health aide	113	G0300-MCWP-Skilled nursing/LVN, ea 15 min

Service ID	Description	Service ID	Description
Managed Care Plan/Fee for Service			
200	S9125-MCP-CS Respite; home, per diem	524	X3910-MCP/FFS-PT Mod/Proc,1+ area, ea addl 15
201	S5130-MCP-CS Homemaker services, ea 15 min	525	X3912-MCP/FFS-Hubbard tank, 1st 30 min
202	T1019-MCP-CS Personal Care svcs, ea 15 min	526	X3914-MCP/FFS-Hubbard tank, ea addl 15 min
203	T2020-MCP-CS Day Habilitation, per diem	527	X3916-MCP/FFS-Tank/pool thera/exer,1st 30 min
204	H2014-MCP-CS Day Habilitation, ea 15 min	528	X3918-MCP/FFS-Tank/pool thera/exer,add 15 min
500	99501-MCP/FFS-Postnatal Assessment & FU	529	X3936-MCP/FFS-PT Unlisted svcs
501	99502-MCP/FFS-Newborn Care & Assessment	530	X4110-MCP/FFS-OT treatment, 1st 30 min
502	99600-MCP/FFS-Unlisted Home Visit svcs/proc	531	X4112-MCP/FFS-OT treatment, ea addl 15 min
503	G0151-MCP/FFS-HHCS for PT, ea 15 min	532	X4118-MCP/FFS-OT Unlisted svcs
504	G0152-MCP/FFS-HHCS for OT, ea 15 min	533	X4302-MCP/FFS-S/I therapy (grp), ea pt
505	G0153-MCP/FFS-HHCS for SLP, ea 15mn	534	X4302-MCP/FFS-S/I therapy (grp), ea pt
507	G0155-MCP/FFS-HHCS for CSW, ea 15 min	535	X4304-MCP/FFS-S/I therapy, ind, per 30 min
508	G0156-MCP/FFS-HH aide svcs, ea 15 min	536	X4306-MCP/FFS-S/I OOO call, 1st pt at loc
509	G0162-MCP/FFS-RN svcs eval/manage, ea 15 min	537	X4320-MCP/FFS-Unlisted speech therapy svcs
511	G0299-MCP/FFS-RN svcs, ea 15 min	538	G0088-MCP/FFS-Admin IV drug, 1st home visit
512	G0300-MCP/FFS-LVN svcs, ea 15 min	539	G0089-MCP/FFS-Admin SQ drug, 1st home visit

Service ID	Description	Service ID	Description
Managed Care Plan/Fee for Service			
513	S9123-MCP/FFS-RN nursing svcs, per hour	557	S9122-MCP/FFS-Home health aide
514	S9124-MCP/FFS-LVN nursing svcs, per hour	558	G0493-MCP/FFS-Skilled svcs RN for obs/assessment ea 15 min
515	T1002-MCP/FFS-RN svcs, up to 15 min	559	G0494-MCP/FFS-Skilled svcs LVN for obs/assessment ea 15 min
516	T1003-MCP/FFS-LVN svcs, up to 15 min	560	G0495-MCP/FFS-Skilled svcs RN for Edu/training ea 15 min
517	T1030-MCP/FFS-INP-RN nursing svcs, per diem	561	G0496-MCP/FFS-Skilled svcs LVN for Edu/training ea 15 min
518	T1031-MCP/FFS-INP-LVN nursing svcs, per diem	562	S9128-MCP/FFS-Speech therapy, in the home, per diem
519	X3900-MCP/FFS-PT 1 mod, 1 area, 1st 30 min	563	S9129-MCP/FFS-Occupational therapy, in the home, per diem
520	X3902-MCP/FFS-PT 1 mod, 1 area, ea addl 15 min	564	S9131-MCP/FFS-Physical therapy, in the home, per diem
521	X3904-MCP/FFS-PT 1 proc, 1 area, 1st 30 min	566	V5008-MCP/FFS-Audiometry screening, per visit
522	X3906-MCP/FFS-PT 1 proc, 1 area, ea addl 15 min	567	X4535-MCP/FFS-Unlisted audiological svcs
523	X3908-MCP/FFS-PT Mod/Proc, 1+ area, 1st 30 min	568	X4526-MCP/FFS- Hearing therapy, individual, per hour

Service ID	Description	Service ID	Description
Multipurpose Senior Services Program			
540	S5130-MSSP-3.1 Homemaker services ea 15 min	549	S5125-MSSP-3.7 Attendant care service ea 15 min
541	S5131-MSSP-3.1 Homemaker services per diem	550	S5126-MSSP-3.7 Attendant care service per diem
542	T1019-MSSP-3.2 Personal care services ea 15 min	551	S9125-MSSP-5.1 Respite care, in the home per diem
543	T1020-MSSP-3.2 Personal care services per diem	552	S5150-MSSP-5.1 Unskilled respite care ea 15 min

Service ID	Description	Service ID	Description
544	G0159-MSSP-3.3 Physical therapy, in the home ea 15 min	553	S5135-MSSP-8.3 Companion care, adult ea 15 min
545	S9131-MSSP-3.3 Physical therapy, in the home per diem	554	S5136-MSSP-8.3 Companion care, adult per diem
546	H2032-MSSP-3.3 Activity therapy ea 15 min	555	T2040-MSSP-8.5 Financial management waiver ea 15 min
547	S8990-MSSP-3.3 PT maintenance therapy, per visit	548	S0390-MSSP-3.3 Foot care preventive maintenance, per visit

Service ID	Description	Service ID	Description
Regional Center			
062	RC Personal Assistance 062	742	RC Licensed Vocational Nurse 742
310	RC SDP Respite 310	744	RC Registered Nurse 744
313	RC SDP Homemaker 313	772	RC Physical Therapy 772
320	RC SDP Community Living Supports 320	773	RC Occupational Therapy 773
359	RC SDP Home Health Aide 359	854	RC Home Health Agency 854
361	RC SDP Skilled Nursing 361	856	RC Home Health Aide 856
372	RC SDP Speech/Hearing/Language 372	858	RC Homemaker 858
375	RC SDP Occupational Therapy 375	860	RC Homemaker Service 860
376	RC SDP Physical Therapy 376	862	RC In-Home Respite Service Agency 862
460	RC Participant Directed Nursing 460	864	RC In-Home Respite Worker 864
465	RC Participant Directed Respite 465	896	RC Supported Living Services 896
707	RC Speech Pathology 707		

Supported Languages

For Sandata Mobile Connect (SMC) and Telephone:

Supported Languages	Presentation Order
English	1
Spanish	2
Mandarin	3
Cantonese	4
Vietnamese	5
Tagalog	6
Korean	7
Arabic	8
Armenian	9

Security Settings

This section contains the requirements specified for logins and passwords.

For CalEVV:

- Username: the email address entered during user account creation.
- Password:
 - Minimum length of 12 characters
 - Must contain at least one upper case letter
 - Must contain at least one lower case letter
 - Must contain at least one number
 - Must contain at least one special character
- Password is valid for 60 days.
- The last 12 passwords are stored in the system and cannot be re-used.
- Portal timeout warning message appears after 5 minutes.
 - Timeout warning will display for 5 minutes. If the portal remains idle after 2 minutes, the user is logged out.
- Portal Lock Out: 5 unsuccessful sequential login attempts within 15 minutes.
 - Contact administrator or Customer Care to unlock

For the Sandata Mobile Connect (SMC) Application:

- Username: the email address entered during account creation for the staff/caregiver.
- Password:
 - Minimum length of 12 characters
 - Must contain at least one upper case letter
 - Must contain at least one lower case letter
 - Must contain at least one number
 - Must contain at least one special character
- Password is valid for 90 days.
 - Password expiration warning message begins appearing: 10 days before expiration.
- Application timeout warning message appears after 5 minutes.
 - Timeout warning will display for 5 minutes. If the app remains idle after 2 minutes, the user is logged out.
- Application Lock Out: 3 unsuccessful sequential login attempts within 15 minutes.
 - Contact administrator or Customer Care to unlock
- Security Questions: 3 security questions must be set up and answered when resetting a forgotten password.

Visit Exceptions

Visit exceptions occur when the CalEVV system identifies that information from a visit is either missing or is incorrect. When this occurs, an agency user who has access to correct or modify visits can fix any information within a visit. These exceptions are indicated by a red dot and must be fixed for a visit to be verified.

More than one exception can apply to a single visit and fixing one issue within Visit Maintenance may also fix other exceptions. A visit with one or more exceptions has an 'incomplete' status. Resolving all exceptions on an incomplete visit, updates the visit status to 'verified'. A visit with the status of verified means there are no exceptions. All changes and updates are tracked within the History tab of the visit.

Exception	Description
Visits Without Any Calls	This exception occurs when a scheduled visit does not occur.
Missing Service	This exception occurs when the service provided during a visit is not recorded or present in the system.
Unknown Client	This exception occurs for a visit that was performed for a client that is not yet entered or not found in the EVV system.
Unknown Employee	(Telephony only) This exception occurs for a visit that was performed by a caregiver who was not yet entered or not found in the EVV system (At the time the visit was recorded).
Visits Without In-Calls	This exception occurs when a visit is recorded without an "in" call that began the visit.
Visits Without Out Calls	This exception occurs when a visit is recorded without an "out" call that completed the visit.
Unauthorized Service Exception	This exception occurs when the service recorded during a visit does not match an active service in the client-payer section of the client record.

Reason Codes

Reason codes are used when making all Visit Maintenance changes or updates, including fixing exceptions and when making manual changes to visits. There is also the ability to add a note to provide additional clarification when reason codes are selected. The table below lists the reason codes for CalEVV. Reason code 999 'Other' requires a reason note.

Note that reason code descriptions may be abbreviated for presentation on the CalEVV and CalEVV Aggregator system.

Reason Code	Code Description
100	Member No Show
110	Member Unavailable
130	Member Refused Service
150	Caregiver Failed to Call In - Services Were Delivered
160	Caregiver Failed to Call Out - Services Were Delivered
170	Caregiver Failed to Call In & Out - Services Were Delivered
180	Caregiver Called Using an Alternate Phone
190	Caregiver Change
200	Mobile App Issue/Inoperable
210	Telephony Issue/Inoperable
230	Service Outside the Home
240	Unsafe Environment
999	Other

CalEVV Recorded Webinar Series

These short training videos and recorded webinars are created for agency administrators and are located on Sandata on-Demand and are available 24/7 for reference and education. While most videos are standalone topics, the CalEVV Introduction, System Overview Initial Login Process, and System Overview & Navigation, offer the user a good starting point for the system.

**Note: To access the video links below, you must have your Sandata on Demand login information.*

Webinar Course Name	Link	Date Added
CALEVV Introduction	CA EVV Introduction - California Video Library	4/26/22
System Overview Initial Log-In Process	CA EVV System Overview Initial Log in Process - California Video Library	4/26/22
System Overview & Navigation	CA System Overview and Navigation - California Video Library	4/26/22
Data Entry – Clients	CA EVV Data Entry Clients - California Video Library	4/26/22
Data Entry – Employees	CA EVV Data Entry Employees - California Video Library	4/26/22
Mobile App Initial Log-In	CA Mobile App Initial Login - California Video Library	4/26/22
Visit Capture – Creating Visits with the Mobile App 2	CA Visit Capture Creating Visits with the Mobile App - California Video Library	4/26/22
Visit Capture – Telephonic Visit Verification	CA Visit Capture Telephonic Visit Verification - California Video Library	4/26/22
Visit Maintenance – Introduction	CA EVV Visit Maintenance Introduction - California Video Library	4/26/22
Visit Maintenance – Visit Details	CA EVV Visit Maintenance Visit Details - California Video Library	4/26/22
Visit Maintenance – Exceptions	CA EVV Visit Maintenance Exceptions - California Video Library	4/26/22
Visit Maintenance – Manual Entry	CA EVV Visit Maintenance Manual Entry - California Video Library	4/26/22

Webinar Course Name	Link	Date Added
Group Visit Agency – Introduction & Search	CA Group Visit Agency Introduction & Search - California Video Library	4/26/22
Group Visit Agency – Visit Maintenance for Group Visits	CA Group Visit Agency Visit Maintenance for Group Visits - California Video Library	4/26/22
Group Visit Agency – Manually Entering a Group Visit	CA Group Visit Agency Manually Entering a Group Visit in the CalEVV Portal - California Video Library	4/26/22
Group Visit Caregivers – Creating Group Visits with the Mobile App	CA Group Visit Caregivers Creating Group Visits with the Mobile App - California Video Library	4/26/22
Group Visit Caregivers – Joining a Group Visit with the Mobile App	CA Group Visit Caregivers Joining a Group Visit with the Mobile App - California Video Library	4/26/22
Group Visit Caregivers – Group Visits using TVV	CA Group Visit Caregivers Group Visits using TVV - California Video Library	4/26/22
CA BI JE User Training Video Link	California BI and Aggregator (for JEs) Video Library – Sandata Technologies	4/26/22
Functionality Guidance Training Link Topics Covered: <ul style="list-style-type: none"> • Provider ID Maintenance • Jurisdictional Security • Scheduled Reports • In-App Messaging 	CalEVV Standard English Video Training Recordings – Sandata Technologies	4/26/22
• ASL Video Series	English ASL Videos – Sandata Technologies	5/26/22

Webinar Course Name	Link	Date Added
Spanish Video Series	Spanish Webinars – Sandata Technologies	5/26/22
Bulk Upload	CA EVV Bulk Upload - California Video Library	4/26/22