
CalEVR

Quick Reference Guide (QRG)

Step-by-Step Onboarding Process from Registration to Account Access



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Step 1: Provider Self-Registration

Personal Care Service (PCS) and Home Health Care Service (HHCS) providers are required to register in the California Electronic Visit Verification (CalEVV) Provider Self-Registration portal. ***Only one representative should register on behalf of the provider agency.**

For additional guidance on how to register, please click the following link: [Step-by-step instructional video on how to register in CalEVV](#)

To register in the Provider Self-Registration Portal as a CalEVV Provider (Vendor):

1. Click the link below to navigate to the CalEVV Self Registration Portal:
<https://vendorregistration.calevv.com>
 - a. Note: Self-registration must be completed whether the provider/agency are using the state CalEVV or an Alternate Electronic Visit Verification (AltEVV) system.
2. Enter your **Provider Agency Name** in the required field.

California Electronic Visit Verification - CalEVV Provider Self-Registration Form

This CalEVV self-registration form must be completed by California providers who are required to comply with the 21st Century Cures Act. If you are a provider of personal care services (PCS) or home health care services (HHCS) for programs and services listed on the *Provider Types and Codes* document located on the [Department of Health Care Services EVV website](#), you are required to self-register.

The information gathered on this form is required for CalEVV implementation and to create your CalEVV account. This includes how you intend to collect your EVV visit data, using the state supplied EVV system (known as CalEVV) or an alternate EVV system of your choosing that meets state requirements.

Please note that you will not be able to save the form unless all required fields are completed. Additional information about each field on the form is available in the [Help](#) section on the navigation pane to the left.

Basic Information ^

PROVIDER AGENCY NAME *

3. In the Provider Identifier section, click the **ADD** button to add your Provider Identifier(s).
 - You must add at least one Provider Identifier. A Provider Identifier is used when you bill for services. It is generally how the state or a jurisdictional entity (county, waiver agency, regional center, managed care plan, etc.) recognizes

you. Please provide **all possible** identifiers for each contracted service you provide.

- If there are more than one identifier associated with the provider, please repeat this process by selecting the **ADD** button until all the departments, jurisdictional entities, and provider identifiers you have that are subject to EVV are listed. Providers can add multiple entries and have an ability to add/edit provider identifier(s) once you have access to your account.
- For more information on Provider Identifiers, please visit the [Help](#) page.

Provider Identifiers ^

The Provider Identifiers section of this form will collect all your unique identifiers for each California Department. For more information on provider identifiers, please visit the Help Page. You are required to enter at least one identifier. Please provide identifiers for each contracted service you provide. If there are more than one associated with the provider, please repeat this process by selecting the 'ADD' button until all the departments, jurisdictional entities, and provider identifiers you have that are subject to EVV are listed. Providers can add multiple entries and have an ability to add/edit provider identifier(s) once you have access to your account.

Department	Jurisdictional Entity / Jurisdiction	Identifier Type	Identifier
			<div style="border: 2px solid red; display: inline-block; padding: 5px 15px; background-color: #0056b3; color: white; border-radius: 5px;">ADD</div>

NOTE: DHCS Fee For Service (FFS) providers and Individual Nurse Providers (INP) (who do not associate with HCBA waiver and/or CCS program) will register under DHCS via MCP as their Department, DHCS as their Jurisdictional Entity/Jurisdiction, and add their NPI number used for billing.

Note: Fee-for-Service (FFS) and Individual Nurse Provider (INP) Self-Registration Process

- Please complete the required fields below if you are registering as a FFS provider OR an INP that does not associate with the California Children's Services (CCS) program and/or the Home and Community-Based Alternatives (HCBA) Waiver program.

For **Provider Identifier** section, submit the following information:

- **DEPARTMENT** – FFS or INP provider will select “DHCS via MCP”
- **JURISDICTIONAL ENTITY / JURISDICTION** – FFS or INP provider will select “DHCS”
- **IDENTIFIER TYPE** – DHCS providers will select National Provider Identifier (NPI) for each provider
- **IDENTIFIER** – NPI is 10 digits in length

Add Provider Identifier

DEPARTMENT *

JURISDICTIONAL ENTITY / JURISDICTION *

IDENTIFIER TYPE *

NPI

IDENTIFIER *

#####

SUBMIT

CANCEL

4. Enter your Agency's **address** and **contact information**. (Note: This should be the person who is responsible for ensuring that your agency is EVV compliant.)

Address ^

ADDRESS LINE 1

ADDRESS LINE 2

CITY

STATE

CA

ZIP CODE

#####-#### OR #####

COUNTY

select one

5. If you are an Individual Provider, list your contact information:

Agency Contact Information ^

The agency contact is the initial point of contact and is the individual who will be responsible for the completion of the on-boarding process. For more information about the agency contact, please see the Help section on the navigation pane to your left.

PROVIDER AGENCY PHONE * ###-###-####	PROVIDER AGENCY ADMINISTRATOR EMAIL * jDoe@example.com
PROVIDER AGENCY ADMINISTRATOR FIRST NAME *	PROVIDER AGENCY ADMINISTRATOR LAST NAME *

6. In the **Additional Information** section towards the bottom of page, click the applicable button to confirm if your provider agency is going to use the CalEVV system which is the state solution or an AltEVV system to electronically collect visit data.

7. Click **Submit**.

Additional Information ^

Providers have the option to use CalEVV (the free of cost state supplied EVV system) or an alternate EVV system of your choosing which meet state requirements.

Providers using the CalEVV system will have access to training on how to use the system including how to enter data into the system, how caregiving staff record EVV visit information and how to assure the EVV visit information is accurate.

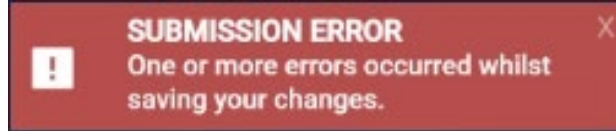
Providers wishing to use an alternate EVV system, please select "NO" and specify the Software Vendor who will be collecting and transmitting your visit data.

WILL YOUR AGENCY BE USING CALEVV TO ELECTRONICALLY COLLECT VISIT DATA? *

YES NO UNKNOWN

SUBMIT

- If you receive a **submission error**, please review the information you have entered for self-registration and resubmit.



- If you have questions regarding the CalEVV Provider (Vendor) Self-Registration Portal form or the CalEVV program, you can find assistance by clicking on the [Help](#) section located on the left-side menu of the portal.

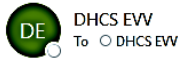
Step 2: Confirmation Email

- Once you click **Submit**, your system generated CalEVV Identifier will display on the screen. The CalEVV Identifier will also be emailed to you.

NOTE: Keep your CalEVV Identifier in a place where you will find it later. It is the ID that uniquely identifies you as a provider in the CalEVV system. You will need this CalEVV Identifier to register for the Sandata Learning Management System (LMS) training and to retrieve your Welcome Kit.

Below is an example of how the initial email appears:

CalEVV Provider Registration Confirmation



*****IMPORTANT - This email contains important information that you need to get started with CalEVV. Please save this email for your reference.*****

Dear Administrator,

Thank you for registering for the California Electronic Visit Verification (CalEVV) system! The following is your CalEVV Identifier and your next steps.

CalEVV Identifier: 111111

You will need your CalEVV Identifier to:

- Register for Sandata Learn Overview Course using the links below.
- For you and your office staff to register for live webinars, which will run from September 28th to December 12th.
 - The webinar registration links will be provided upon completing your Sandata Learn Overview Course.

Next Steps

Click on the link below to sign up for the Sandata Learn Overview Course that applies to You:

- Provider agencies with employees or other staff using the CalEVV system: [CalEVV Provider Agency Admin](#)
- Providers who do not have other staff using the CalEVV system: [CalEVV Independent Providers](#)
- All providers using an Alternate EVV (Alt EVV) system: [CalEVV Alt EVV Providers](#)

Requirements

- This training is **required** to receive your credentials to access the CalEVV system.
- This training is **required** to receive registration links for live webinars for you and your staff, which will run from September 28th to December 12th.
- As a reminder, you and your staff will need your **CalEVV Identifier** to complete all training registrations.

For technical assistance, please contact the Customer Support team at 1-855-943-6070 or CACustomerCare@sandata.com.

Thank you.

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2. The **CalEVV Identification Number** is a six-digit number that provider agency administrators will use to access the [SandataLearn](#) LMS to complete the initial training.
- **CalEVV Identifier number for provider using CalEVV** – Providers using CalEVV to collect their EVV visit data will use their CalEVV Identification Number to access LMS. Providers will go through CalEVV Independent Provider Overview and CalEVV Vendor Administration Overview training through LMS.
 - **CalEVV Identifier number for provider using AltEVV** – AltEVV providers can go through the CA Aggregator Self-Paced Training once the vendor has passed the validation process.

Step 3: Training

In the above email example, provider agency administrators will sign up and take two initial required trainings in LMS.

Depending on the Provider Type, the following trainings will be available in the Sandata Learning Overview Course:

- Provider agencies with employees or other staff using the CalEVV to record EVV visit data – **CalEVV Provider Agency Admin.**
 - Providers who do not have other staff using the CalEVV and are recording their own EVV visit data (e.g., an individual nurse provider) – **CalEVV Independent Providers.**
 - All providers using an AltEVV system – **CalEVV AltEVV Providers.**
1. Complete the fields in the **Sign-Up** section of the screen:
 - a. First Name
 - b. Last Name
 - c. Email address
 - d. Password (must be at least 8 characters long and include at least one number)
 - e. Agency Name
 - f. CalEVV Identifier (received via email just after self-registration)

Sign Up

To use the key CAvendoradmin, please sign up for a new account or login to an existing one.

First Name *Required*

Last Name *Required*

Email *Required*

Password *Required*

Re-enter Password *Required*

Agency Name: *Required*

CalEVV Identifier (Self Registration assigned n... *Required*

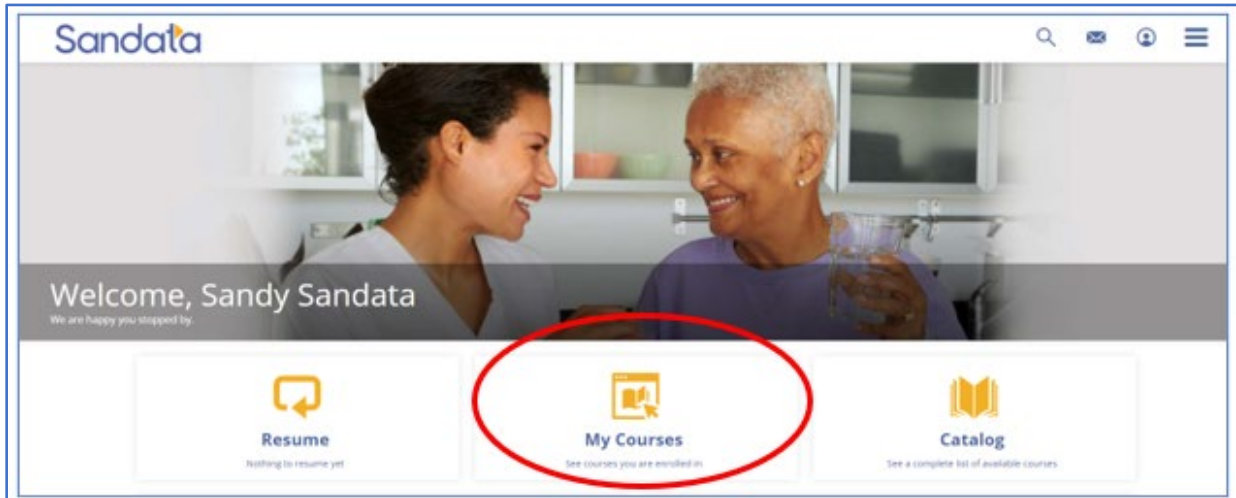
Sign Up

[Back To Login](#)

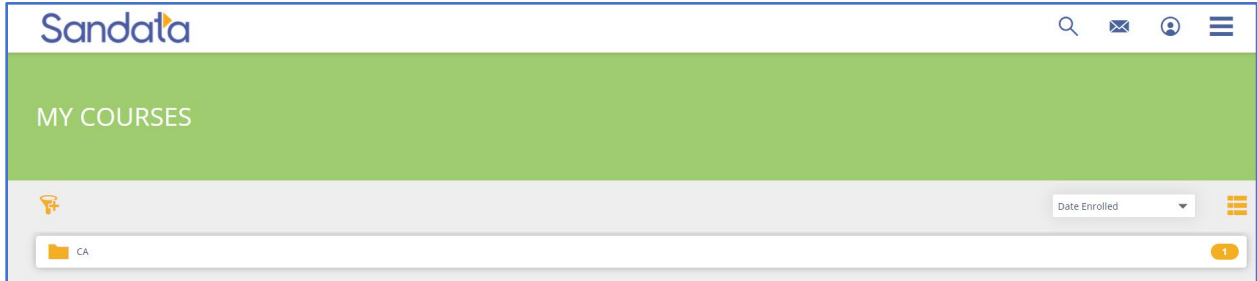
CalEVV identifier is the six-digit number from email when first registering.

2. Click the **Sign-Up** button.

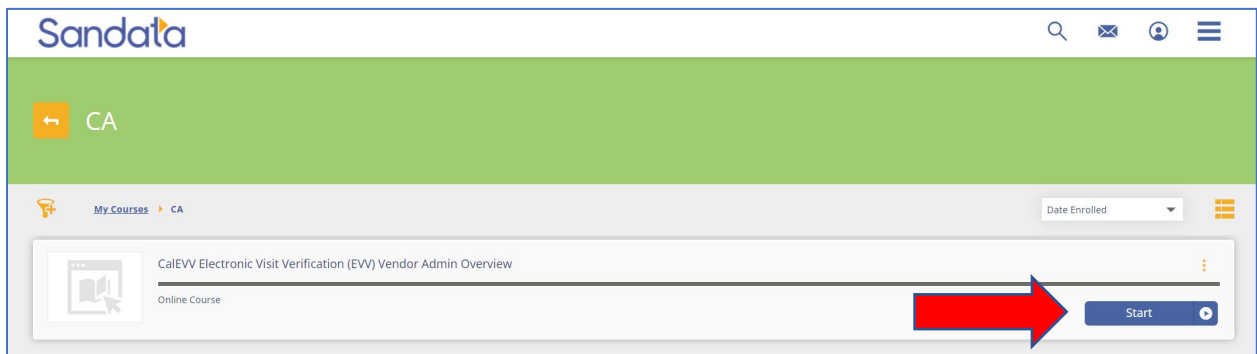
3. On the **SandataLearn** homepage, click on **My Courses**.



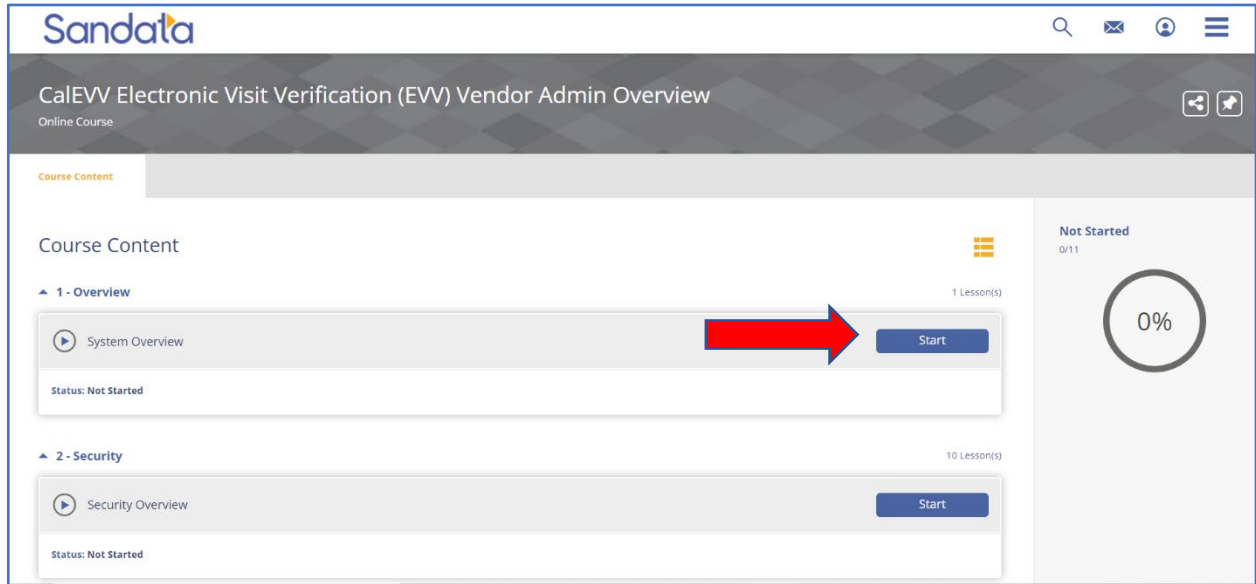
4. Next, click on the **CA** folder to view all available CalEVB training courses.



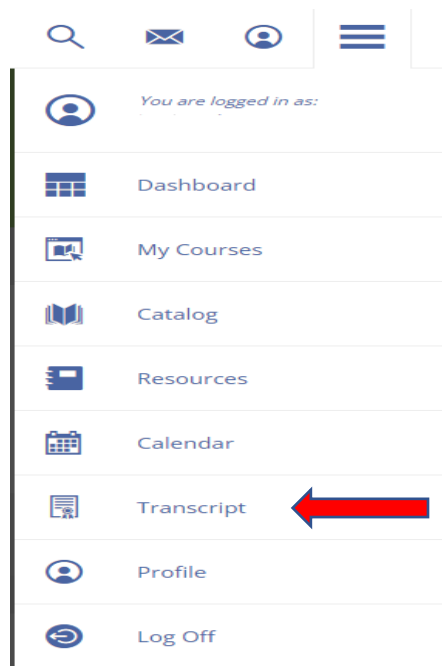
5. Select the course name and click on the **Start** button to access the course contents.



6. Click the **Start** button to start the training session. (Note: Sessions must be completed in sequential order. When one session is complete, the next session will unlock and become accessible.)



7. Upon completion of each training module, the lesson progress will show a status of "COMPLETED". When all initial training is complete, download the *Certificate of Completion* by clicking on **Transcript**.



COMPLETION OF TRAINING (Depending upon the provider type)

- **CalEVB Independent Provider Overview** – Once this training is completed, the provider will receive an email for further steps.
- **CalEVB Vendor Admin Overview** – Once this training is completed, the provider will receive an email for further steps.
- **CA Aggregator Self-Paced** – The training for the Aggregator goes to the provider agency for view-only option and not to the vendor. The provider will receive an email for further steps.

Note: AltEVB provider – This is a self-paced course for provider agencies using an approved AltEVB system.

Step 4: Welcome Kit

About 24-48 hours after you have access to the *Certificate of Completion*, the administrator will receive another email with additional training courses for you and your office staff in addition to your Welcome Kit.

Once certification is complete for, the provider agency will get their Welcome Kit and will use their email as their username and the production credentials. Once the required LMS training is complete, the provider's CalEVB administrator will receive the login information for the CalEVB portal.

The **Welcome Kit** includes:

- Agency STX number
- Username
- Temporary Password

Example:

Dear Provider:

The California Electronic Visit Verification (EVV) Phase II Project would like to welcome you and your staff to CalEVV. Your CalEVV account has been set up and is now available.

To access your Cal EVV account, please go to this web address:
<https://evv.sandata.com/VM/Login>

The credentials and temporary password to access your agency's Cal EVV account are:

▶ Agency:	«###»
▶ Username:	«Username»
▶ Temporary Password:	«EVV_Account_Password»

Please Note: The temporary password is only valid for 60 days. You will be required to change the temporary password the first time your agency accesses the account. After this time, the temporary password will no longer work.

Telephone Number

The following telephone number is for your staff conducting in-home visits to call in and out for their visits. This telephone number is unique to your account:

Your visit phone number for using EVV on the telephone:	1.800.xxx.xxxx
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1. The above information is sent via email to the Provider Administrator. Please use this information to sign into the CalEVV portal. See below:
2. Once you have signed in with the temporary password, please update and confirm your new password. Click **SAVE**.



The screenshot shows the Sandata login portal. At the top is the Sandata logo with the tagline "Get more right from the start". Below the logo is a note: "* indicates required field". There are three input fields: "AGENCY" with the value "STX", "USERNAME *" with the placeholder "Enter Username", and "PASSWORD *" with a masked password ".....". Each field has a red arrow pointing to the right. Below the password field is a checked checkbox labeled "REMEMBER ME". At the bottom is a blue "LOGIN" button.

Sandata
Get more right from the start

Change Password

* indicates required field

OLD PASSWORD *

Enter Old Password

NEW PASSWORD *

Enter New Password

CONFIRM NEW PASSWORD *

Confirm New Password

Note: Password is case sensitive

SAVE

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Technical Support

For technical questions regarding the onboarding process or the information provided above, contact the Sandata Customer Care team at 1-855-943-6070 or CACustomerCare@sandata.com.

Additional Resources

For general information about the EVV program, please visit:

- [Department of Health Care Services EVV Webpage](#)
- [Department of Developmental Services EVV Webpage](#)
- [California Department of Public Health Medi-Cal Waiver Program](#)
- [California Department of Social Services EVV Webpage](#)

For additional questions, please email:

- Department of Health Care Services at: EVV@dhcs.ca.gov
- Department of Developmental Services at: EVV@dds.ca.gov
- California Department of Aging at: EVV@aging.ca.gov
- California Department of Public Health at: CDPHMCWP@cdph.ca.gov
- EVV Self-Direct Model for IHSS and WPCS at: EVV@dss.ca.gov