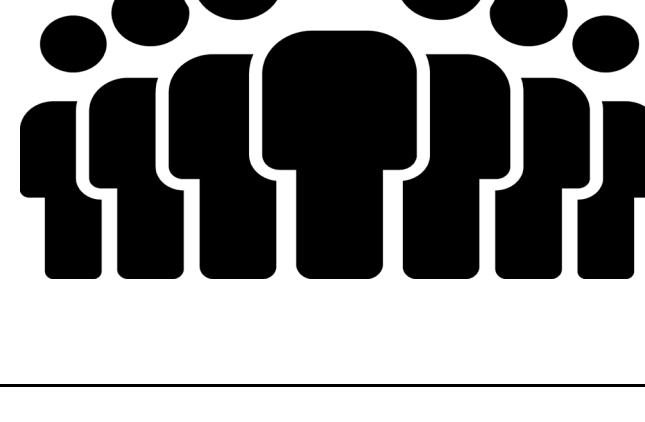


## Creating Group Visits in CalEVV

### What Is A Group Visit?

A group visit is when one or more caregivers provide the same service to multiple clients at the same time and place.

One caregiver will start the group visit, and all other caregivers will then join the group visit.

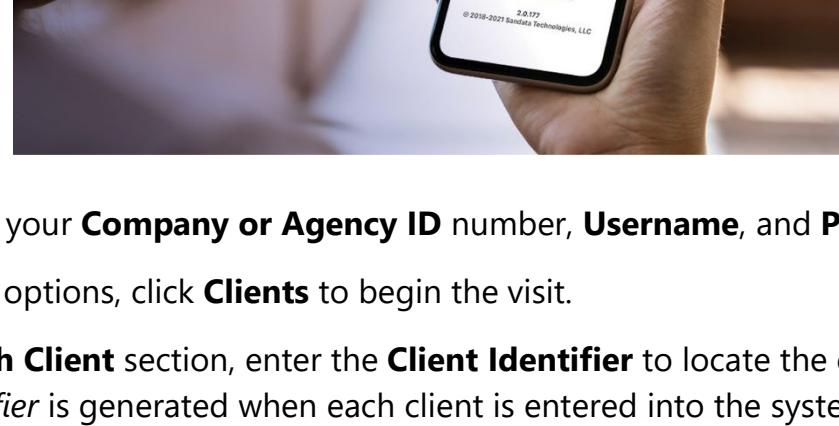


### Ways To Create A Group Visit



- There are **three (3) ways** to create a Group Visit:
  - Mobile Application
  - Telephonic Visit Verification (TVV)
  - Manual Entry
- A group visit does not need to start and end at the same time.
- A group visit can have an unlimited number of clients in a group visit.
- Group visit codes are good for 24 hours.
- Only one (1) group visit code can be used per group visit.

### Sandata Mobile Connect (SMC) 2.0 Application for Group Visits in CalEVV



- 1) Log in using your **Company or Agency ID** number, **Username**, and **Password**.
- 2) In the menu options, click **Clients** to begin the visit.
- 3) In the **Search Client** section, enter the **Client Identifier** to locate the client. (Note: A unique *Client Identifier* is generated when each client is entered into the system).
- 4) Click the **Start Group Visit** button.
- 5) On the **Service Selection** screen, choose the service being performed from the list of options in the client's record, then click **Start Group Visit** again.
- 6) Select the **location** and click next.
- 7) When prompted, "Are you sure you want to start a group visit?" Select **YES** to confirm.
- 8) A **Group Visit Code** will appear on the screen.
  - This code will be needed to assign each client that is part of the group visit.
  - If multiple caregivers were involved in the group visit, share the code with them so they can "join" the same group visit.

See [CalEVV Group Visits - Creating Group Visits with the Mobile App<sup>1</sup>](#) and [CalEVV Group Visits - Joining A Group Visit with the Mobile App<sup>2</sup>](#) training videos to learn more).

### Telephonic Visit Verification (TVV) for Group Visits in CalEVV



## Call Reference Guide:

Agency Account Number: STX

Write your Santrax ID number above for easy reference.

Dial:

Features:  
Call In / Out  
Group Visit - No  
Select Language

Change Service  
Select Service  
Select Location

Your agency account number begins with STX. Following STX is a unique set of numbers for your agency. Unique account numbers have been assigned to each agency.

A Santrax identifier is created when a caregiver is added to an agency's CalEVV system. The caregiver will then use that unique ID number to log visits. If a caregiver works for multiple agencies, then a unique Santrax ID number is needed for each agency.

There will be two numbers for each agency for caregivers to call-in and call-out.

See [CalEVV Group Visits - Creating Group Visits Using TVV<sup>3</sup>](#) training video to learn more.



## Manual Entry for Group Visits in CalEVV

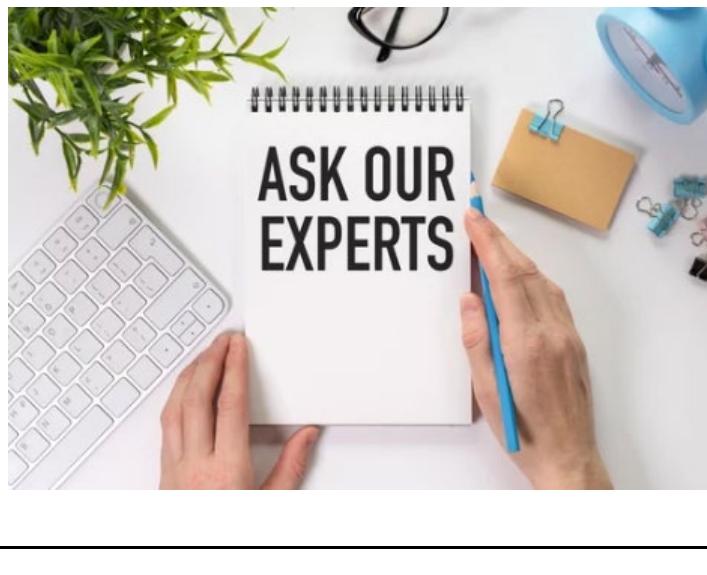
- 1) Log into the CalEVV Portal by entering the **STX (agency number)**, **Username**, and **Password**.
- 2) Click on **Create Call** button in the upper right corner of the **Visit Maintenance** screen.
- 3) Using the required (\*) search fields to filter and select the client.
- 4) Search and select the employee/caregiver who provided the service.
- 5) Select the **date, time, location**, and **type of service** that was performed.
- 6) Click the **Generate Group Visit Code** button to create a group visit code.
- 7) Write down this group visit code. All additional client records associated with this group visit must include this code so they can be correctly linked to the same visit.
  - o **DO NOT** click the *Generate Group Visit Code* button again for each new client added, as only one (1) group visit code can be used per group visit.
- 8) For this first client, click **Finish** to receive a confirmation pop-up that the call was successfully created.
- 9) To add more clients from the same group visit, repeat **Steps 2-5** for each additional client, then click **Finish**.
- 10) After adding all clients to the group visit, use the search fields in **Visit Maintenance** to locate and verify the client(s) for the visit. Check the *Visit Details* for any visit exceptions indicated by a red dot (•), such as missing Call-in and Call-Out times until the visit reaches a **verified** status.
- 11) If any clients are missing the group visit code, input the previously generated code into the **Group Visit Code** field to link the clients to the same group visit.
- 12) Select a **Reason Code** from the available options in the **Select Reason Code** drop-down menu (i.e., 170 Caregiver Failed to Call-In and Out - Verified Services Were Delivered).
- 13) Click **SAVE** to apply the changes to the *Visit Details* and close the window. See [CalEVV Group Visits - CalEVV Group Visits for Agencies - Manually Entering a Group Visit<sup>4</sup>](#) to learn more.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Visit Status	Group Visit Code	Actions
Apple, John	Garcia, Sofia	RC Participant Directed Respite 465	02/24/2022	09:00 AM	12:00 PM	03:00	Verified	914988	/
Morrison, Gerald	Garcia, Sofia	RC Participant Directed Respite 465	02/24/2022	09:00 AM	12:00 PM	03:00	Verified	914988	/
Nichols, Michelle	Garcia, Sofia	RC Participant Directed Respite 465	02/24/2022	09:00 AM	12:00 PM	03:00	Verified	914988	/



For video tutorials on how to create Group Visits using SMC, TVV, and Manual Edits, visit the [CalEVV Training Video Library<sup>5</sup>](#).

For **AltEVV providers**, contact your Alt Vendor or access the [Alternate EVV Resources<sup>6</sup>](#) for information.



## Join us for our

## August Office Hours!

Friday, August 8 | 2pm – 3pm **Q&A Only**

[Register](#)

Monday, August 25 | 2pm – 3pm **Q&A Only**

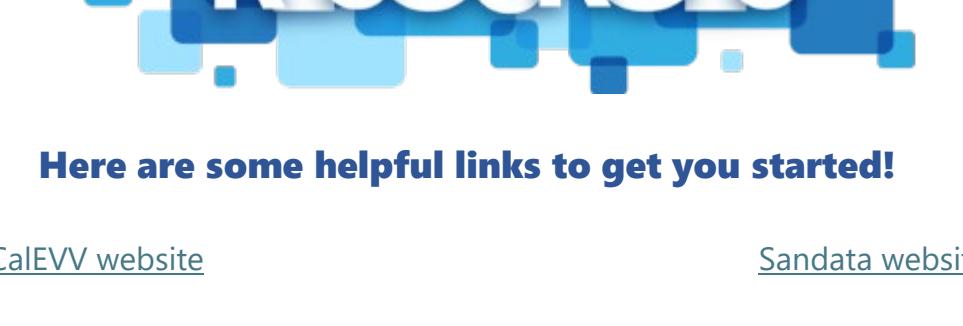
[Register](#)

**SUBSCRIBE**

### CalEVV E-mail Notifications

Stay informed with the latest news and updates. Click [subscribe](#) to join our mailing list.

*(Explore [previous editions of the CalEVV Spotlight](#))*



### Here are some helpful links to get you started!

[DHCS CalEVV website](#)

[Sandata website](#)

[CalEVV Group Visits for Agencies - Introduction & Search](#)

[1CalEVV Group Visits - Creating Group Visits with the Mobile App](#)

[2CalEVV Group Visits - Joining A Group Visit with the Mobile App](#)

[3CalEVV Group Visits - Creating Group Visits Using TVV](#)

[4CalEVV Group Visits for Agencies - Manually Entering a Group Visit](#)

[CA Group Visit Caregivers](#)

[5CalEVV Training Video Library](#)

[6Alternate EVV Resources](#)

### Need Assistance?

For program policy questions, email [EVV@dhcs.ca.gov](mailto:EVV@dhcs.ca.gov).

For CalEVV customer support, call 1-855-943-6070 or email [CACustomerCare@sodata.com](mailto:CACustomerCare@sodata.com).

For EVV assistance with alternate systems, call 1-855-943-6069 or email [CAAltEVV@sodata.com](mailto:CAAltEVV@sodata.com).

To update administrator access to CalEVV, submit a request ticket through [Sandata On-Demand](#).



Questions? E-mail us at: [EVV@dhcs.ca.gov](mailto:EVV@dhcs.ca.gov)