



Rhode Island EOHHS Electronic Visit Verification (EVV) Program Provider Training – Phase I Reporting

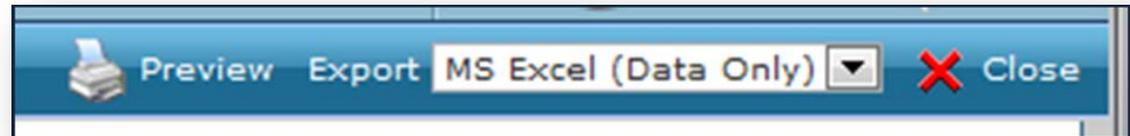


Agenda

- ⚡ How to Run a Report
- ⚡ Useful Reports

How to Run a Report

1. Click **Reporting** from the menu bar.
2. Select a report from Navigation panel
3. Edit Report Filters
 - ⚡ Each report will have different filter and sort options.
4. View Report
 - ⚡ Click **Preview** to view a PDF version.
 - ⚡ Or choose an export format and click **Export**.



Sample Report



Clients List - with last scheduled date

Name	Chart ID	ROC	SOC	Last Scheduled	Status	Perm Schedule
A, Sandra	M0000009057-HH	3/31/2011	3/23/2011	6/29/2012	03-Hold	
B, Leo	M0000006275-HH	9/28/2011	9/17/2011	7/21/2012	02-Active	
C, Michael	M0000006379-HH	3/11/2011	3/3/2011	6/26/2012	02-Active	
D, Mary	M0000008411-HH	6/27/2010	7/1/2010	6/7/2012	02-Active	
D, Marie	M0000003077-HH	5/16/2011	5/6/2011	7/3/2012	02-Active	
L, Elizabeth	M0000002849-HH	6/14/2010	7/1/2010	7/12/2012	02-Active	
M, Peter	M0000002567-HH	5/23/2011	5/14/2011	7/4/2012	02-Active	
P, Charles	M0000008071-HH	3/16/2011	2/24/2011	6/23/2012	02-Active	
P, Fred	M0000003869-HH	6/8/2010	7/1/2010	6/28/2012	02-Active	
R, Henry	M0000001391-HH	9/8/2011	8/26/2011	12/25/2011	02-Active	
S, Marvin	M0000009381-HH	8/10/2010	7/29/2010	7/22/2012	02-Active	
S, Carol	M0000003945-HH	7/6/2010	7/1/2010	8/11/2012	02-Active	
W, Ruth	M0000003293-HH	6/12/2010	7/1/2010	6/31/2012	02-Active	

Total: 13

Clients List - with last scheduled date

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Useful Reports



- ⚡ Scheduling → Calendar by Client
 - Individual Schedule Calendars by Client
- ⚡ Scheduling → Calendar by Staff
 - Individual Schedule Calendars for each caregiver.
- ⚡ Clients → Expiring Authorizations
 - Show all authorizations expiring within a given date range.
- ⚡ Clients → Client List with Last Scheduled Date
 - Helps agency identify clients who should be discharged.

What You Have Learned



- ⚡ How to Access the Reports Tab and Run Reports
- ⚡ Useful Reports
 - Calendar by Client
 - Calendar by Staff
 - Expiring Authorizations
 - Client List with Last Scheduled Date



Next Steps



- 📌 Look for your Welcome Kit containing account details will be sent via email
 - Prepare and train field staff on the EVV call process
 - Enter staff data into your system
 - Enroll your field staff in Speaker Verification
 - Verify Client data in your system
 - Create and maintain schedules for recipients

- 📌 Contact Sandata Customer Care for assistance if needed
 - 855-781-2079
 - ricustomercare@sandata.com

THANK YOU FOR YOUR TIME!



We look forward to working with you.

Please do not hesitate to reach out with questions, comments or suggestions as we move forward.