Personal Care & Home Health Care Service Providers – DDS
Step-by-Step On-Boarding for CalEVV

Providers of personal care and home health care services are required to complete self-registration, to go through training and to record and submit electronic visit verification (EVV) data.

For more information about which regional center services and codes are subject to EVV requirements, review the guidance document linked here. [link]

The person at the provider agency who registers and enters their email address during self-registration is the contact person for subsequent onboarding activities detailed below. The contact person is called the 'administrator' of the CalEVV account. More administrators and account users can be added to a CalEVV account after onboarding is complete.

1. **Determine** if you'll use the CalEVV state-provided system or an Alternate EVV system to collect your EVV data.
    - Providers who are not already using a timekeeping or case management system collecting EVV visit data should register and use the state-provided system, CalEVV.
    - This choice can be changed later, if needed.
2. **Self-register** as a provider of personal care services (PCS) and/or home health care services (HHCS) in the CalEVV provider self-registration portal.
    - All providers will self-register regardless of which system used to collect EVV visit data.
    - Complete self-registration using the quick reference guide linked here. [link]
3. **Receive** self-registration confirmation and **save** your CalEVV Identifier Number.
    - If you're using an Alternate EVV system, go to step 4.
    - If you're using the CalEVV system, go to step 5.
4. **If you are using an Alternate EVV system to collect your EVV visit data**:
    - Work with your Alternate EVV vendor, as needed, so that they successfully complete testing with Sandata to send your provider agency's EVV visit data to the CalEVV Aggregator.
    - Once testing between your Alternate EVV vendor and Sandata are complete, the provider agency's administrator will receive a link to required training regarding the CalEVV Aggregator.
    - Once the administrator completes training, the administrator will receive information on how to access your provider agency's CalEVV Aggregator account.
        - Your CalEVV Aggregator account allows provider agencies to see the EVV visit data that was sent to the state from their Alternate EVV vendor on their behalf. Provider agencies should use the CalEVV Aggregator to assure the data being sent is accurate and complete.

- For technical questions or issues regarding the *Alternate EVV certification or onboarding process*, email the Sandata Alternate EVV customer support team at CAAltEVV@Sandata.com.

5. **If you are using CalEVV to collect your EVV visit data:**
    - About 48 hours after you've completed self-registration, the provider administrator will receive an email with a link to access the required overview and security training to complete.
        - After completing the overview and security trainings, you will be able to view and download a certificate from the training page verifying your completion. Download and save this certificate.
    - About 48 hours after you have access to that certificate, the administrator will receive another email with additional trainings for you and your office staff as well as your Welcome Kit.
        - Additional Training: Office staff using the CalEVV system can register for and attend live webinar trainings and/or access recorded videos on various topics. Additional trainings will help you to take the next steps of:
            - Setting up additional office staff as administrators or other roles in the CalEVV system
            - Adding consumers/clients and employees/staff/DSP records to the system
            - Recording EVV data during service visits
        - Welcome Kit: Includes information on how to access your CalEVV account including system log-in information. Also included is helpful information for caregiving staff/DSPs to record EVV visits for your provider agency.
    - For technical questions regarding the onboarding process, or if things are not progressing as explained above, email the Sandata EVV customer support team at CACustomerCare@sandata.com

Additionally, questions can be emailed to the DDS EVV team at EVV@dds.ca.gov.