Sandata Business Intelligence

Standard Card Set

Sandata

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sandata.com

Table of Contents

Introduction

Sandata's Business Intelligence (BI) tool allows a user to view information across payers, programs, services and agencies. As part of each implementation, a standard set of cards is provided by Sandata. The cards provided are broken into two dashboards:

1. Clients & Employees – Includes cards with demographic information about providers, clients and employees
2. Visit Information – The cards in this section provide insights on EVV utilization by the providers in the program. It includes information on the number, type and status of services provided, statistics on the method used to verify the visits (manual or automatic), exceptions, conflicting (overlapping) visits, to name a few.

This document will provide an overview of each of the current, standard cards. For each card, we will document:

- Purpose of the card
- What the card Shows
- Drill path
- Key Attributes
- Quick Filters

Data shown is based on information imported overnight. The exact date and time of the last import shown in the tool. All data from Sandata EVV and received from 3rd Party EVV users (Alt EVV) is available.

Before you continue reading this document, it is important to note:

- Data shown in the screenshots contained in this document belongs to a demonstration dataset and has been utilized for the purpose of providing a sample of the appearance with the cards
- Cards included in this document may have differences to those included in a production dashboard as modifications may have been required in order to better represent the data according to the entity's business rules.
- Table-type cards may limit the number of rows shown depending on the amount of data to be displayed and a warning will be shown at the top of card. The user is encouraged to use the filters or quick filters (if available) to narrow down the data displayed. Exporting to Excel will include all data.
- Cards that contained too many data points or that include sensitive data will be represented in this document with a partial screenshot.
- Provider types are identified as follows
  - Agency – providers using Sandata EVV for visit capture
 - Alt EVV – providers using 3rd party EVV vendors

Client – Employees Dashboard

Provider Demographics

Geographical representation of provider's location based on their primary address.

Purpose

This card depicts provider distribution throughout the country by state, based on the address information received in the Provider Feed. Note that this is at the EVV Account level. Sandata creates a different provider account when the provider's Medicaid ID changes and based on this, the same provider may be listed multiple times.

Provider Demographics Sep 24, 2019 - Feb 2, 2020 ⌄

Total
29,616

14,316
12,726
11,136
9,546
7,956
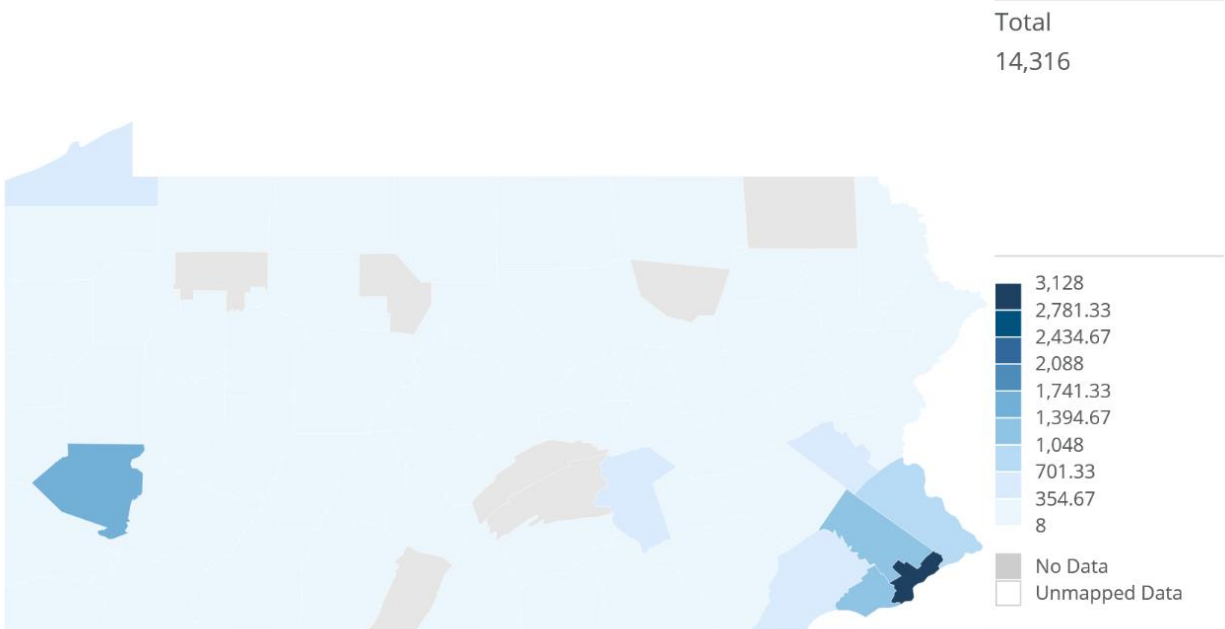6,366
4,776
3,186
1,596
6
No Data
Unmapped Data
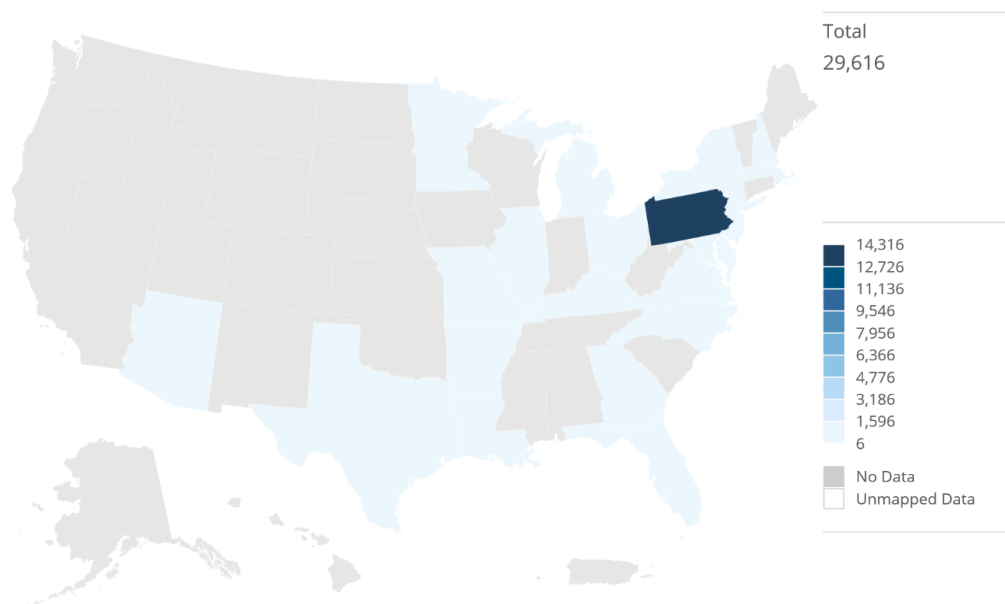
What the card shows

This card can be used to understand where providers are located. The color density represents the number of providers in that particular location.

The user has the ability to drill down through the various state counties to the zip code level by selecting areas from the map. Note that there may be providers shown outside of the state. This may be based on the use of the parent entity's address for the provider or based on a provider actually being outside of the state, perhaps in an adjoining state.

Drill path

Selecting a particular state will drill down and the map will only show counties within that state. Hovering over the color block will show the state name as well as the number of providers.

Total
14,316

3,128
2,781.33
2,434.67
2,088
1,741.33
1,394.67
1,048
701.33
354.67
8

No Data

Unmapped Data

Hovering over the county will show the county name as well as the number of providers in the county. Click on any of the counties to show the map by zip code along with density:

Total
3,128

172
153.56
135.11
116.67
98.22
79.78
61.33
42.89
24.44
6

No Data
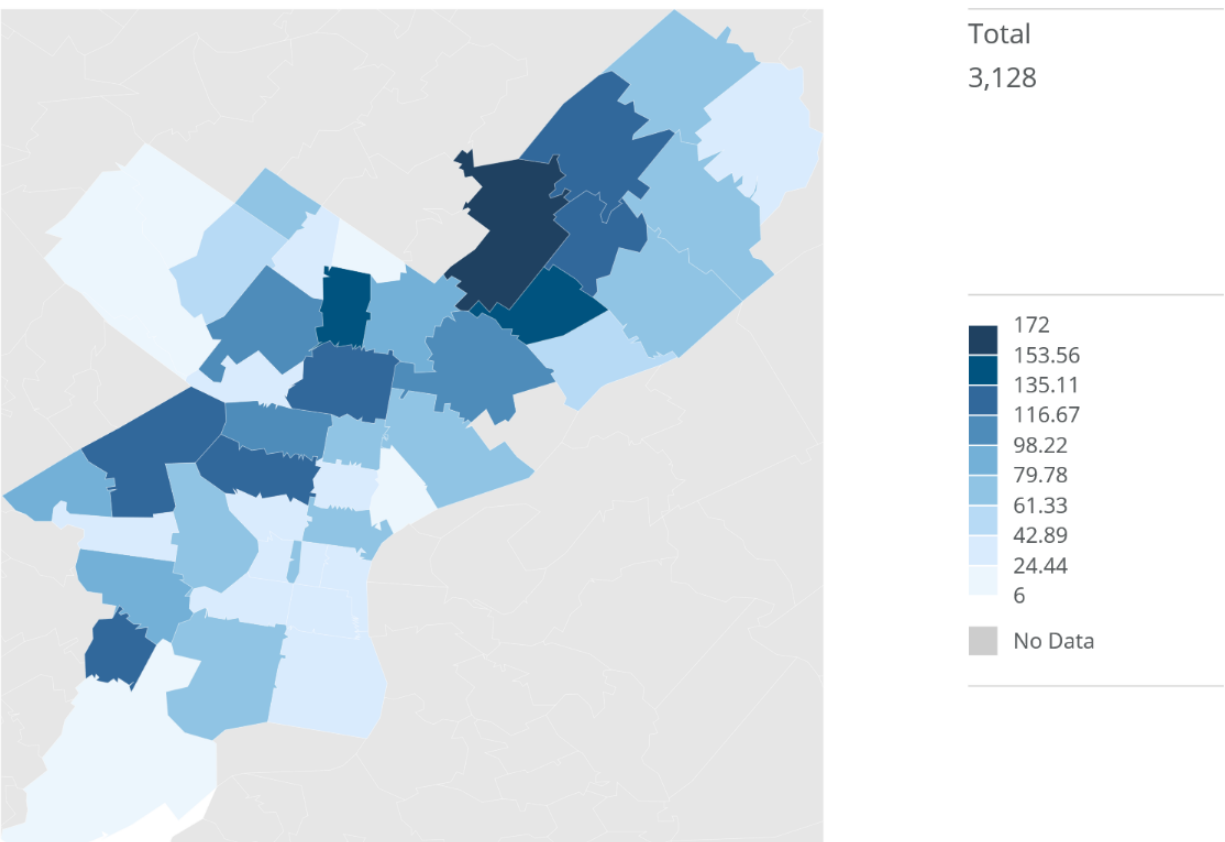
Hovering over the map will show the zip code and the number of providers within that zip code. Selecting a particular zip code will drill down and will show the specific Sandata account, provider Medicaid ID in a tabular form showing the Sandata EVV account number, Provider Medicaid ID, account name, primary contact, full address, email and phone.

Note: The following screenshot only shows headers.

Provider Demographics 👤

Filters	State In PA ×	FIPS In 42009 ×	ZipCode In 16664 ×									
Account	Provider Medicaid ID	ProviderType	AccountName	Name	Address1	Address2	City	State	ZipCode	EMail	Phone

Key Attributes

- State
- County
- Zip Code based on the Provider's location
- Account – Sandata Assigned Account Number
- Provider Medicaid ID

Provider Listing

Displays provider demographic information in a table.

Purpose

This card provides summary level information for each provider, including the total number of active employees, total number of active clients and total number of visits for the current month. It can be used to look at overall activity by provider.

Each provider will be listed in a different row based on the Santrax Account Number and Provider Medicaid ID. Note that depending on your configuration, Sandata may create Alt EVV accounts for each provider along with a standard Sandata EVV account. Providers using another Alt EVV vendor for their EVV collection, MAY have up to 3 accounts.

Due to the amount of data, not all data might be shown on the card and it is suggested that the quick filters be applied. Exporting to Excel will include all data.

Provider Listing
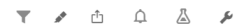
CreatedDate	Provider Type	Account	AccountName	Vendor	Provider Medicaid ID	Address1	City	State	ZipCode	Phone	Name	EMail	# Employees	# Clients	# Visits This Month	# Visits YTD
2017-10-30 23:34:13	Agency	22918	Demo Account 1	Demo Vendor 1	DEMOID1	1775 Cannery Road	Hartford	CT	06101	9598446666	Demo Account 1	demoemail@demo.com	174	99	2,079	29,110
2017-10-30 23:34:49	Agency	23151	Demo Account 2	Demo Vendor 1	DEMOID2	1078 Underhill Lane	Hartford	CT	06102	9592730086	Demo Account 2	demoemail@demo.com	1,983	1,691	32,611	423,848
2018-08-24 09:16:40	Agency	24432	Demo Account 3	Demo Vendor 1	DEMOID3	934 Oak Hill Drive	Hartford	CT	06103	9596069561	Demo Account 3	demoemail@demo.com	156	340	7,722	95,313
2020-02-11 16:49:19	Agency	43197	Demo Account 4	Demo Vendor 1	DEMOID4	0 Abbotts Pointe Court	Hartford	CT	06104		Demo Account 4	demoemail@demo.com	648	846	6,810	77,616
2020-02-04 13:13:59	Agency	43183	Demo Account 5	Demo Vendor 1	DEMOID5	0 Abbotts Pointe Court	Hartford	CT	06105		Demo Account 5	demoemail@demo.com	557	1,015	4,029	67,774

Quick Filters

- Provider Type
- Vendor
- Name

What the card shows

This information should be considered to be primary source of summary and detail level provider information. The user can choose to see only Sandata EVV or Alt EVV providers or both. Users will be able to see both summary and aggregate information including the number of clients, number of employees and number of visits for the current month.

Key Attributes

- Provider Medicaid ID
- # Employees
- # Clients
- # Visits This Month
- # Visits YTD

Employee Profile by Provider Type

Shows the number of active providers by type.

Purpose

The pie chart will show the distribution of providers by provider type. Provider types displayed will depend on the configuration used for the program.

Provider - Employee Profile By Provider Type 👤

● Agency	2,418
● Alt EVV	741

Alt EVV | 741 | 23.46%

Agency | 2,418 | 76.54%

Total
3,159
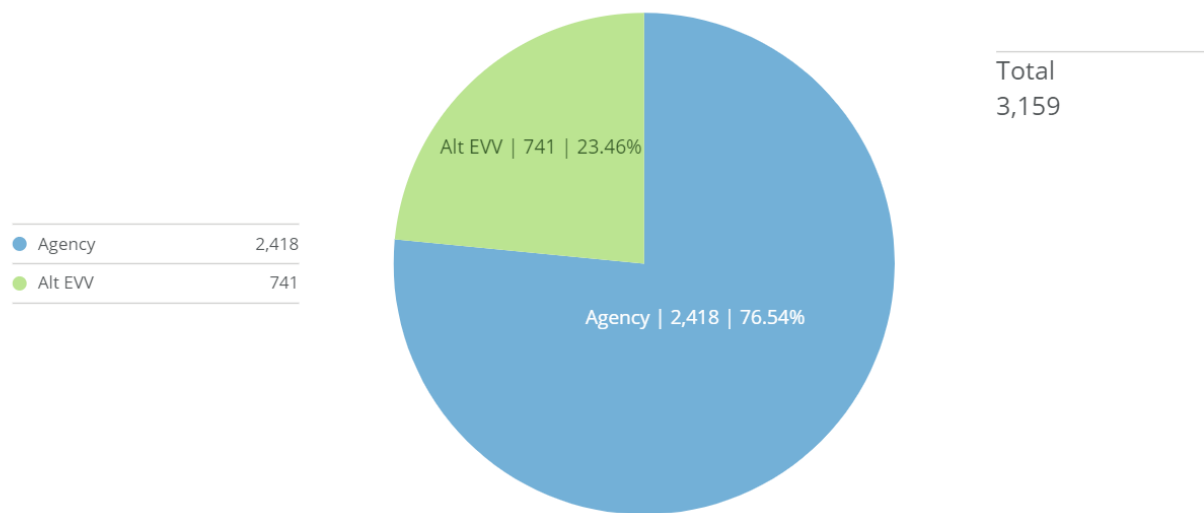
Quick Filters

- Has employees (Yes/No)

What the card shows

The user has the ability to review the number of active employees by provider. Use the quick filters on the right side of the screen to narrow down the data and list only those providers that have employees.

The agency may have 0 active employees because they have either never entered employees in the system or all employees have been deactivated.

Drill Path

Selecting a slice drills down to a tabular view of the agency, listing the name of the provider along with the total number of employees for that selection.

Provider Employee Summary

Filters Account is 23151 ×

Account	AccountName	Provider Medicaid ID	Name	Provider Type	# Employees
23151	Demo Account 2	DEMOID2	Demo Account 2	Agency	1,983

Key Attributes

- Provider Type
- Provider Medicaid ID
- # Employees

Active Employee Listing

Displays detailed employee information in a table.

Purpose

This card provides detailed information for all active employees across all providers. Individuals working for multiple providers will be listed multiple times: once for each provider they are employed with. Due to data volume, not all employees will be listed and it is encouraged that you use filters to narrow down the data shown in the card. This information can be exported to Excel for further analysis.

Active Employee Listing						
Account	**Provider Medicaid ID**	**Account Name**	**Employee Full Name**	**Santrax ID**	**Employee ID**	**Employee Email**
00002	DEMOID2	Demo Account 2	Gould, MANUELA	122119774	100119574	demo@email.com
00002	DEMOID2	Demo Account 2	Haley, TENESHA	122117744	100117744	demo@email.com
00002	DEMOID2	Demo Account 2	Hardy, LEE	122119771	100119571	demo@email.com

What the Card Shows

This card is the primary source of employee information for the program. Users can select any employee name or employee ID to see more detailed information available for that employee.

Drill Path

When the user selects an employee by clicking on their name, the card will pull the records across all providers that match that name, which may result on multiple rows being displayed. The drill down will include additional information for the employee selected such as: email, full address and phone number (if provided).

The following screenshot includes a portion of the data points included in the card. Please note that due to the sensitivity of the data contained, only headers are being shown.

Active Employee Listing

Provider Medicaid ID	Account Name	Santrax ID	Employee Full Name	Employee SSN	Employee Email	EmployeeAddr1	EmployeeAddr2	EmployeeCity	EmployeeState	EmployeeZip	EmployeePhone1

Key Attributes

- Account / Provider Medicaid ID
- Employee Full Name
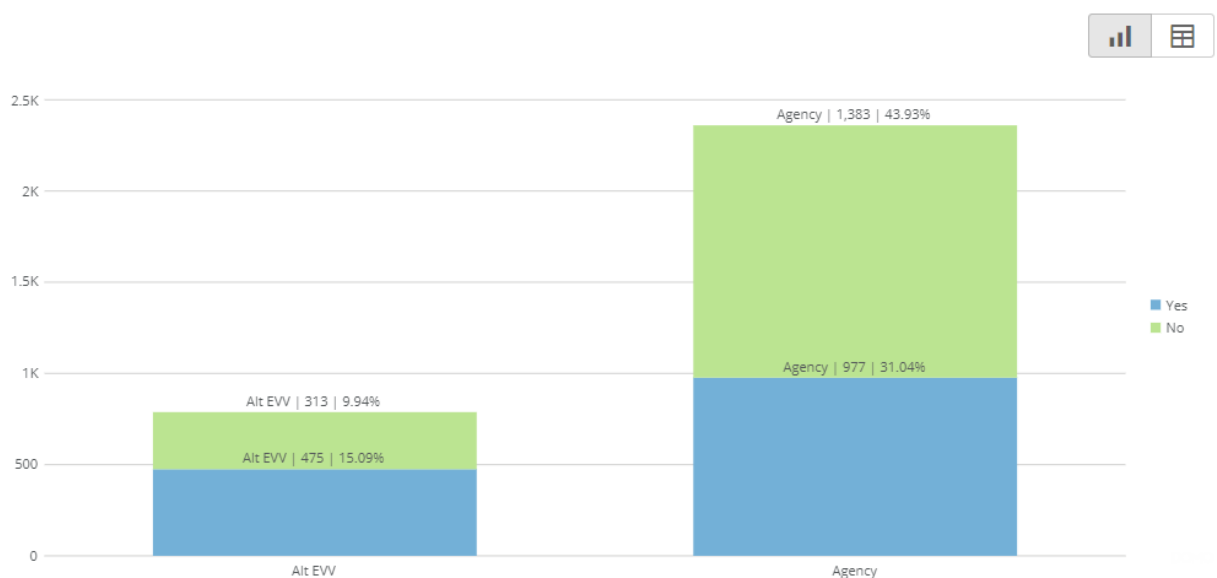- Employee SSN
- Santrax ID

Provider – Client Profile by Provider Type

Displays providers with active clients assigned.

Purpose

This card shows the number of providers by type, indicating the number of providers that have clients associated with them and the number of providers who do not. Provider types displayed will depend on the configuration used for the program. At the beginning stages of the program, this card is useful to review EVV adoption based on client creation for different providers.

Quick Filters

- Clients Assigned (Yes/No)
- Provider Type

What the card shows

The card will include stacked bars for each provider type that is available in the program depending on configuration. The stacked bars represent: 1) the number of providers with active clients assigned; and 2) the number of providers without active clients assigned.

Drill path

Once a category is selected, users will see the listing of providers matching the selection, including the number of clients assigned to them.

Provider Clients Summary

Filters | Provider Type = Agency × | Client(s) Assigned = Yes ×

Provider Type	Account	AccountName	Provider Medicaid ID	Name	Clients
Agency	00001	Demo Account 1	DEMOID1	Demo Account 1	193

For further inquiry, users can select any specific value and see related information. For example, by selecting a particular Medicaid ID, users can see the listing of clients associated with that provider.

Key Attributes

- Provider Medicaid ID
- # Clients
- Client Full Name
- Client Address 1

Active Client List by Account

Displays detailed client information in a table.

Purpose

This card provides detailed information for active clients across all providers. The card includes information about the program(s) and service(s) each client is part of. In the event of clients receiving services from multiple providers, the same client will be listed multiple times: once for each provider from which they receive services.

Due to data volume, not all clients will be listed and it is encouraged that you use filters to narrow down the data shown in the card. This information can be exported to Excel for further analysis.

Active Client List By Account

769 Total Clients

Warning: Not all the data is shown.

Account	Account Name	Creation Date	Client ID	Client Full Name	Client Medicaid ID	Client Address 1	Client Address 2	Client City	Client State	Client ZipCode	Client Phone 1	Client Phone 2	Client Phone 3	Payer	S
00001	Demo Account 1	2020-10-29	238051	Alvarado, MARIA	1234567890			Washington	DC	20001				Demo Payer 1	
00001	Demo Account 1	2020-11-01	637274	Arias, DOREEN	1234567890			Washington	DC	20001				Demo Payer 1	

Quick Filters

- Provider Type
- Account Name
- Client Full Name
- Client Medicaid ID

What the Card Shows

This card is the primary source of client information for the program. Information on this card displays clients per account, payer, program and service. Users may opt to select an individual account name to view all clients associated with that provider. A given client could be listed many times based on their Client Medicaid ID if the client is receiving multiple services.

Key Attributes

- Client Full Name
- Client Medicaid ID
- Client Address
- Client Phone
- Payer
- Program
- Service

Visit Information

## Verified Visits – Auto vs Manual

Summary of visits by employee where the relation between automatic and manual verification is shown.

Purpose

This card is a cross-provider view of EVV compliance showing the auto verified versus non-auto verified ratio. Auto verification is defined as a visit which had no exceptions and moved to a verified status without any manual interactions. Manually verified visits have at least 1 manual updated applied, including fixes and/or acknowledgements.

Early in a program, this card is critical in identifying caregivers and providers where additional training and support may be needed to understand the optimal way to increase their auto verification percentages. As the program is accepted, these numbers can be used to identify potential issues with provider EVV compliance which may warrant further investigation.

Verified Visits - Auto vs. Manual 👤   Last 31 Days ⌄

Account	Provider Name	Santrax ID	# Visits	# Verified	% Verified	# Not Verif	% Not Verif	# Auto Verif	% Auto Verif	# Manual Verif	% Manual Verif	# Omitted	% Omitted
00005	Demo Account 5	100105556	62	60	97%	2	3%	26	**43%**	34	57%	0	0%
00005	Demo Account 5	100106577	10	10	100%	0	0%	9	**90%**	1	10%	0	0%
00005	Demo Account 5	100109944	5	4	80%	1	20%	4	**100%**	0	0%	0	0%
00005	Demo Account 5	100111670	19	15	79%	4	21%	4	**27%**	11	73%	1	5%
00005	Demo Account 5	100116135	60	60	100%	0	0%	57	**95%**	3	5%	0	0%
00005	Demo Account 5	100116382	60	59	98%	1	2%	57	**97%**	2	3%	1	2%

Quick Filters

- Provider Type
- Visit Status

What the card shows

The table includes visit verification activity for the past 31 days, for visits in a verified and processed date. Processed indicates that the visit has gone through claims validation once and successfully returned. Visits in any other state are considered to be not verified: scheduled, in process, omitted)

Calculation notes:
Visits = # Verified Visits + # Not Verified
Verified Visits = # Auto Verified + # Manually Verified

Drill Path

Selecting an employee based on their Santrax ID, will provide the user with a listing of all visits associated with the employee in the reporting date range. The listing will include the client for which services were providers, as well as the call in/out type, payer, visit status, verification type, bill hours. For each visit, it will be shown whether the visit currently contains exceptions as well as the total of exceptions recorded.

Note: The screenshot below is a partial screenshot due to the number of data points included and the sensitivity of the data included in this card.

Verified Visits - Detail ⊘ ⊖

Warning: Not all the data is shown.

Filters

	Provider Medicaid ID	Payer	Call In Type	Call Out Type	Client Full Name	Employee Full Name	Visit Status	Verified	Verified Type	Bill_Hours

Key attributes

- Provider Name
- Provider Medicaid ID
- # Visits
- % Auto Verified
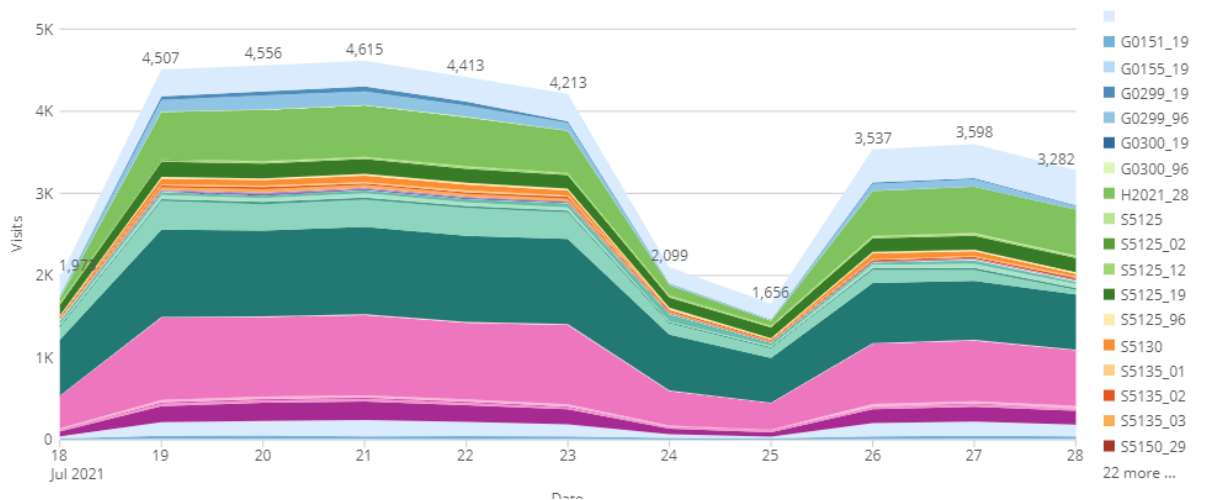- % Manually Verified
- Employee Santrax ID

Trending Visits

Number of visits of each service types by day across all accounts.

Purpose

Show the trend of visits by day based on the service selected. This card is useful to gain an understanding of volume of visits per service type.

Quick Filters

- Account Name

What the Card Shows

The user can see the total number of visits for the time period at the top left side of the card. By default, the time period selected will be last two weeks from the current date.

Services configured for the program are shown in legend, located on the right side of the chart. Hovering over one of the various areas of the chart will highlight the corresponding service and it will display the daily volume for the service for a particular day.

Users have the ability to select or exclude accounts or add filters to narrow down the visits includes by provider type, or subset of services.

Drill Path

When selecting one specific service type, a drill thru will show how visits are distributed among all the accounts in a horizontal bar chart.
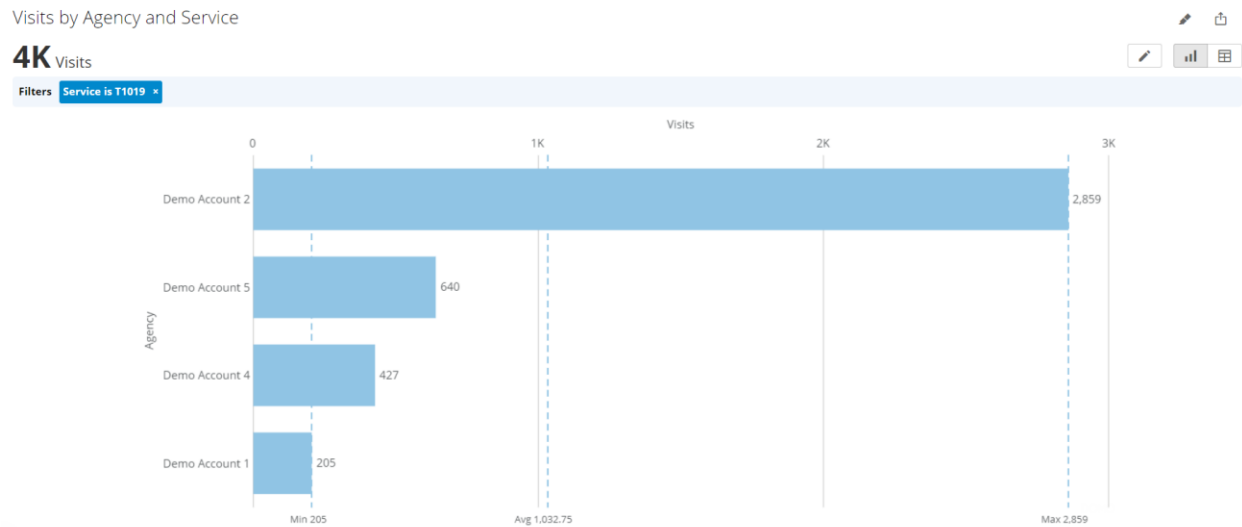
Selecting a bar will drill down to a view showing details of the visits that are part of the summary number shown for the provider selected.

Key attributes

- Service
- Account - Sandata Assigned Account Number
- Visit Start Date

Visits by Day

Number of visits by day shown in a calendar.

Purpose

This card providers the user with an overview of visit volumes in the current calendar year for the program, identifying variations in the number of visits over time.

User will be able to identify peak usage both by day and within a specific day. This can help planning for support resources as well as understanding how members are generally provided services. This chart can also help identify the relative usage of the different call types. The goal is generally to minimize the number of manual calls to both facilitate accurate electronic capture and minimize manual provider work.


What the card shows

The card uses color density to denote volume of visits for each day. This is helpful in identifying trends (for example: weekdays vs weekends) and spikes in services that may be related to holidays or other reasons that would need further investigation.

Hovering over a particular day will show the number of visits for that day.

Drill path

Selecting a given day will a bar chart showing the number of in calls by hour. The chart will include a bar chart for each hour of the day, with different colors within each bar to identify the modality used for the in call: MVV, IVR, FVV (if in use) and Manual call in types.

In Calls By Hour By Type 👤
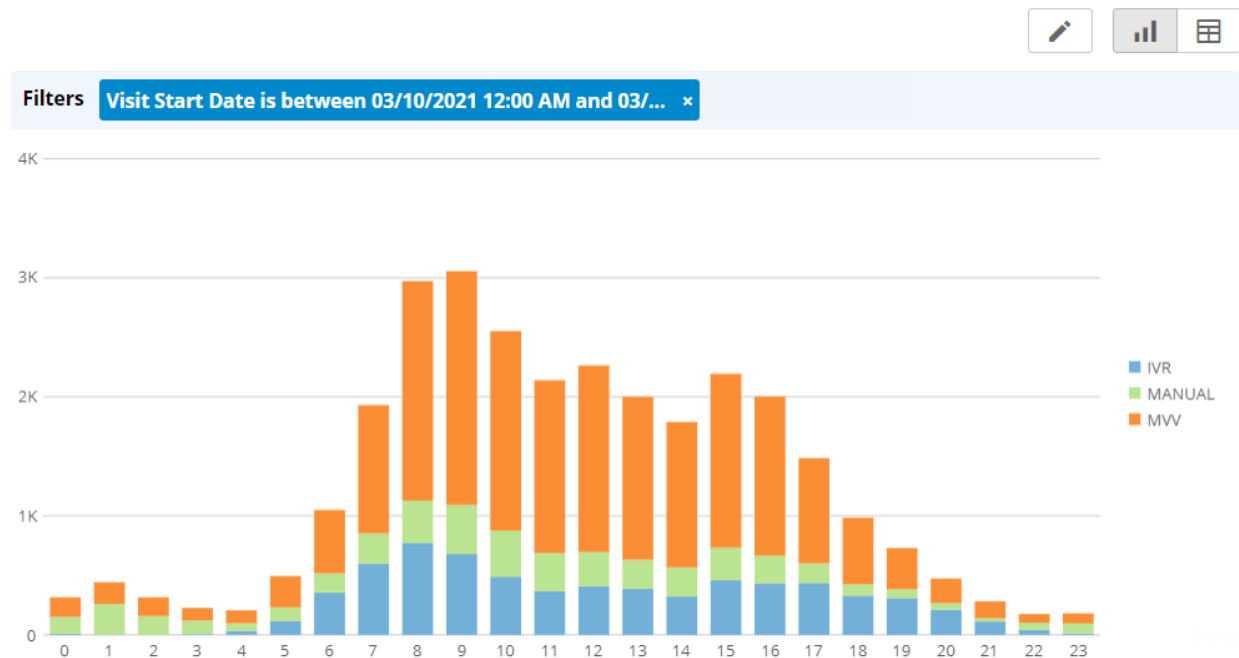
Selecting a particular hour and call type (color) will drill into the visit detail.

Key attributes

- Account - Sandata Assigned Account Number
- Count of Visits per Day in total
- Count of Visits by Hour and Call Type
- Visit Start Date – based on the date of the in call
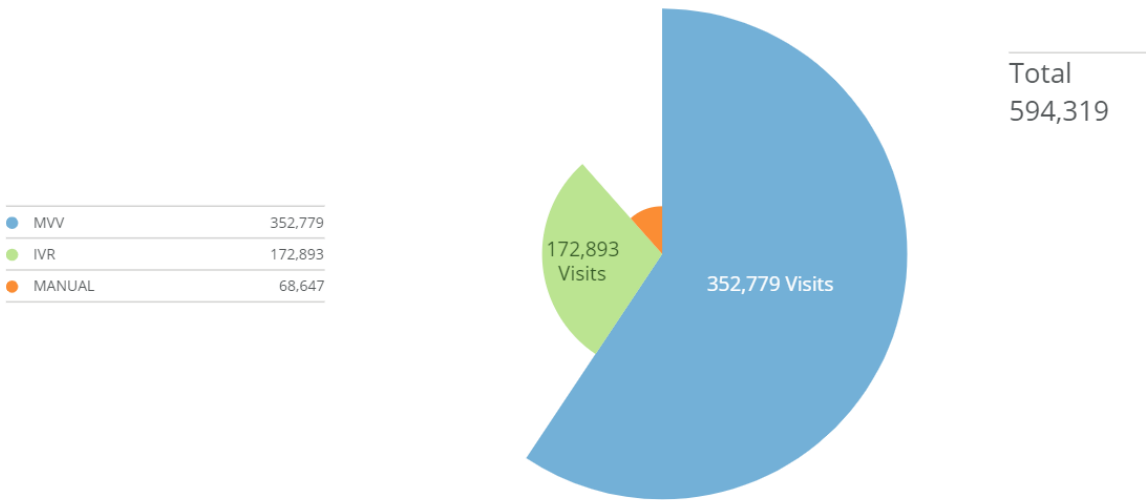- Call In Type

Visits by In Call Type

Counts of visits for each call in type

Purpose

This card provides the user with a quick view of device utilization across the program.

Visits By In Call Type

IVR: 172893 | MVV: 352779 | Manual: 68647 Tri Summary

● MVV	352,779
● IVR	172,893
● MANUAL	68,647

Total
594,319

172,893
Visits

352,779 Visits

What the card shows

The card is a visual representation of visits based on the call in type: IVR, MVV, FVV (if in use) and Manual, for the past 31 days. Total visit counts by type are displayed below the name of the card. Hovering over a particular call in type will display the percentage of visits for this call in method in relationship to the total visits in the reporting date range.

Drill path

Select any call type will show the top agencies making the call in type selected.

In Call Type By Provider

64,017 Visits

Filters Call_In_Type = MVV ×
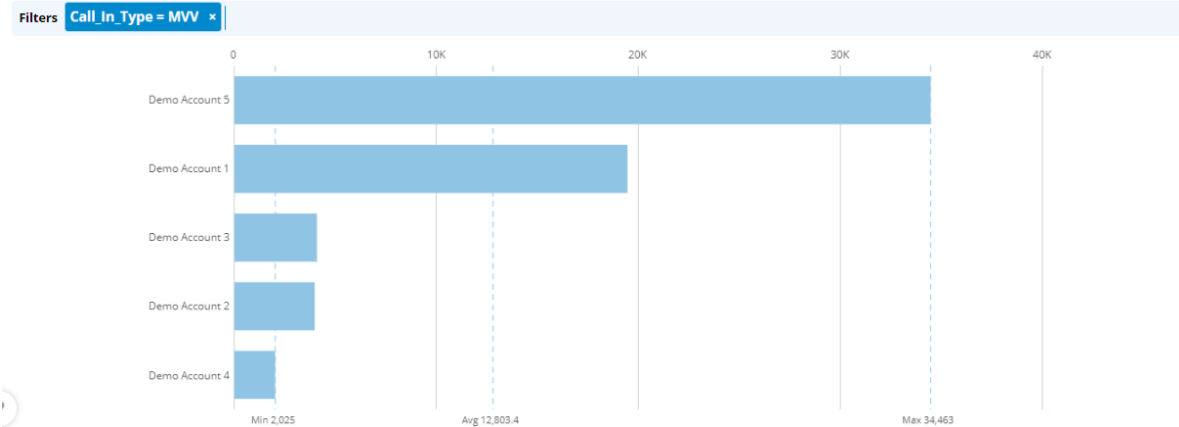
Drill down further by clicking on the bar corresponding to the provider to investigate. This will display a table listing visit details for that provider, where call in type matches the original selection.

Below is a partial screen shot of the visit detail view, displaying some of the data points available.

Visit Detail

Warning: Not all the data is shown.

Filters Call In Type = MVV ×

Account	Provider Name	Client Full Name	Client Medicaid ID	Visit Start Date	Visit Status	Adjusted In Time	Adjusted Out Time	Call In Phone	Call In Type	Call In Latitude	Call In Longitude	Call Out Phone	Call Out Type	Call Out Latitude	Contract

Key attributes

- Account - Sandata Assigned Account Number
- Call In Type
- Count of Visits per Call Type

Visit Listing (Current Week)

Visit details shown in a table for the current week

Purpose

Lists each of the visits that took place in the reporting period, which is current week by default. This card will be useful for compliance reviews conducted on a particular provider, or when reviewing utilization of services for a particular client. The data in this card is also helpful in identifying the correlation between services and the different payers and providers in the program.

This card will be useful in evaluating the participation levels in the program by providers using the various Alt EVV vendors versus those using Sandata EVV.

Note that depending on the volume of data listed, not all data will be shown on the card. Exporting the data to Excel will include all data.

Visit Listing (Current Week) This Week ⌄

22,204 Visits

Warning: Not all the data is shown.

Vendor	Verified Type	Account	Provider Medicaid ID	Provider Name	VisitKey	Payer	Visit Status	Client Medicaid ID	Client ID	Client Full Name	Employee Full Name	Santrax ID	Employee SSN	In Call	Call In Type	Out Call	Call Out Type	GPS Distance	Client Digital Signature	Client Voice Signature	Client Verified Service
Demo Vendor 1	AUTO	22918	DEMOID1	Demo Account 1	2257857121	Demo Payer 1	Verified	1234567890	690388	Koch, Abdikadir	Faulkner, Halimo	222793731	###-#4-1672	2020-08-10 05:34:06	MVV	2020-08-10 11:21:54	MVV	Yes	Yes	No	Yes
Demo Vendor 1		22918	DEMOID1	Demo Account 1	2257857357	Demo Payer 1	Incomplete	1234567890	223228	Koch, Amaal	Koch, Warsame	222277742	###-#3-9292	2020-08-10 05:42:19	IVR	2020-08-10 09:47:56	IVR	No	No	No	No
Demo Vendor 1	AUTO	22918	DEMOID1	Demo Account 1	2257858956	Demo Payer 1	Verified	1234567890	991020	Haney, Umi	Frederick, Hamdi	222739919	###-#7-2771	2020-08-10 06:00:15	IVR	2020-08-10 08:15:43	IVR	No	No	Yes	Yes
Demo Vendor 1		22918	DEMOID1	Demo Account 1	2257858958	Demo Payer 1	Incomplete	1234567890	895853	Foley, Zamzam	Stein, Kaltum	222116474	###-#7-4976			2020-08-10 06:00:18	IVR	No	No	No	No

Quick Filters

- Provider Type
- Visit Status
- Group Visit
- Vendor

What the card shows

By default, the card will only display visits with a Visit Start Date within the current week. Filtering the data by Visit Status can allow the user to understand the volume of visits for that status and compare it to others. For example: the number of visits in Verified status vs the number of visits that are Processed.

Filtering by Group Visit will be useful in those configurations where it is possible to have a single employee providing services to one or more clients at the same time.

Drill Path

Selecting a particular visit will result in a listing of any exceptions associated with the visit. If the visit does not have any exceptions associated with it, the resulting view will list 0 visits.

Account	VisitKey	Employee Full Name	Exception	Exception Create Date

Visit Exceptions

0 Visits

Filters   VisitKey = 2414488048 ×

Key attributes

- Account Name
- Client Full Name
- Employee Full Name
- Call In Type
- Call Out Type
- In Call Date and Time
- Total Exceptions currently applied to the visit

GPS Visits Mapped

Location of all calls received containing GPS latitude and longitude coordinates

Purpose

The map shows the location of all calls made from a GPS enabled device. This will include calls sourced from Sandata's MVV devices and 3rd party GPS calls. This card provides a way to visualize call density based on a location.
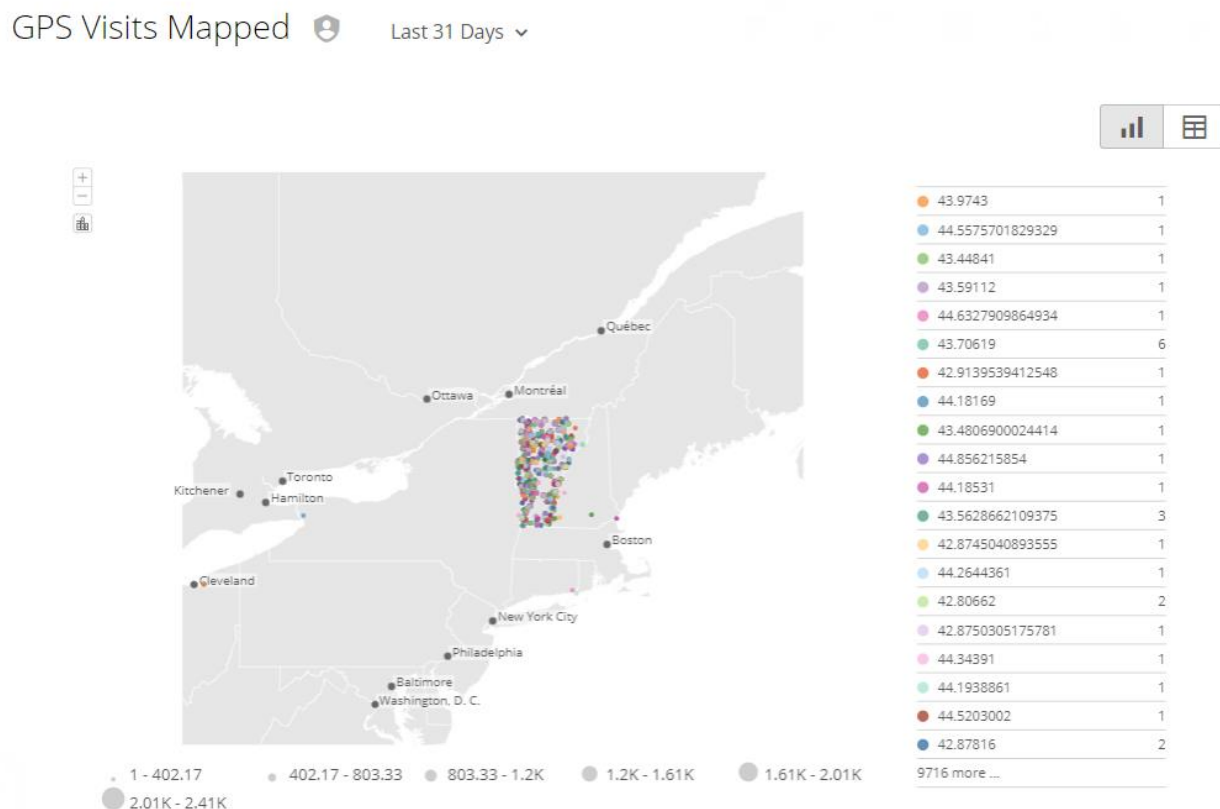

What the card shows

This card is invaluable not just for showing call density within the state but also showing calls that occurred outside of the state. These outliers likely need investigation to determine if they were collected properly or if services truly were appropriately rendered outside of the state.

Note that the BI tool is mapping all GPS visits when the card is being rendered which for larger periods of time could be slow.

Drill Path

Selecting a point on the map will zoom into that location and will show all visits that took place in that particular location. Each visit will be represented by a dot. Hovering over a dot will show the provider under which the services were rendered.
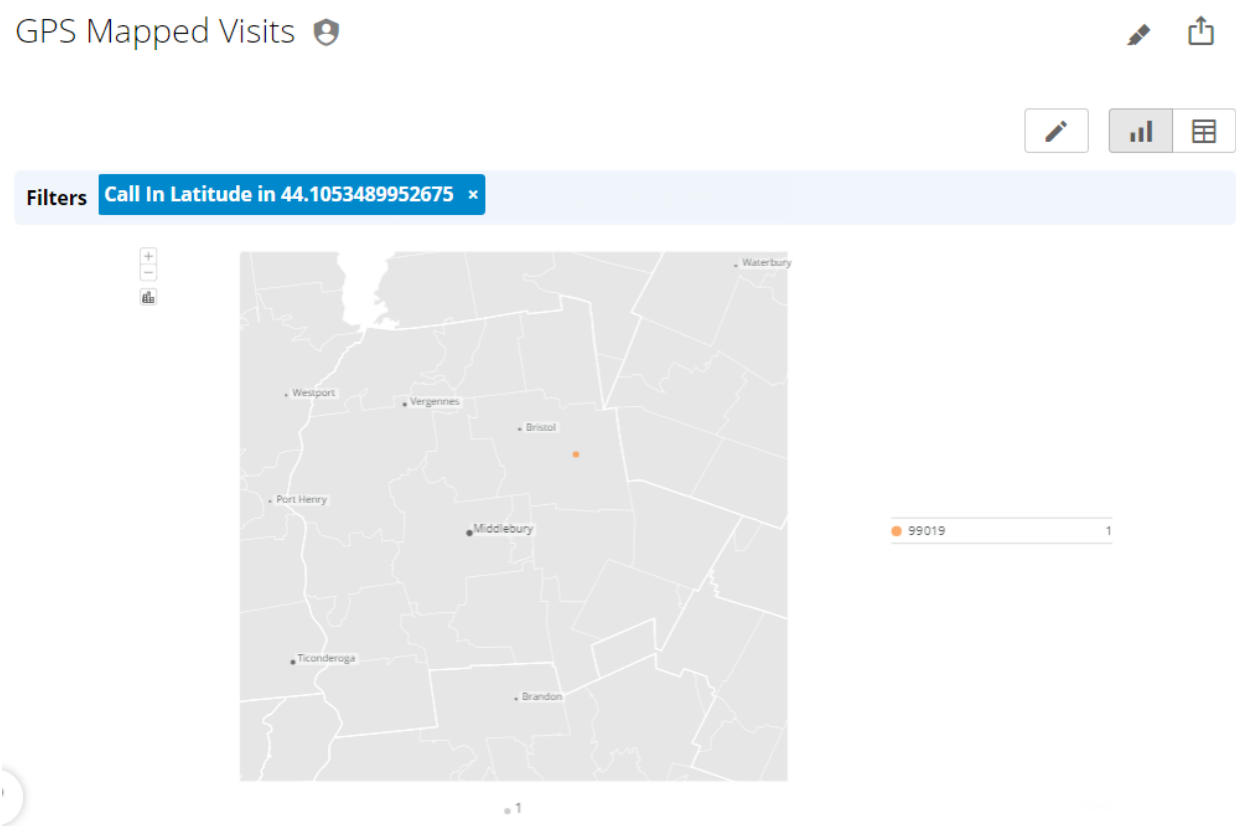
Selecting a visit will result in a detailed visits view that will include the client and employee involved in the service, the coordinates and methodology used for the call in and call out. This view also includes the status of the visit. Below is a partial screen shot of the visit detail view, displaying some of the data points available.

Key attributes

- Client Full Name
- Employee Full Name
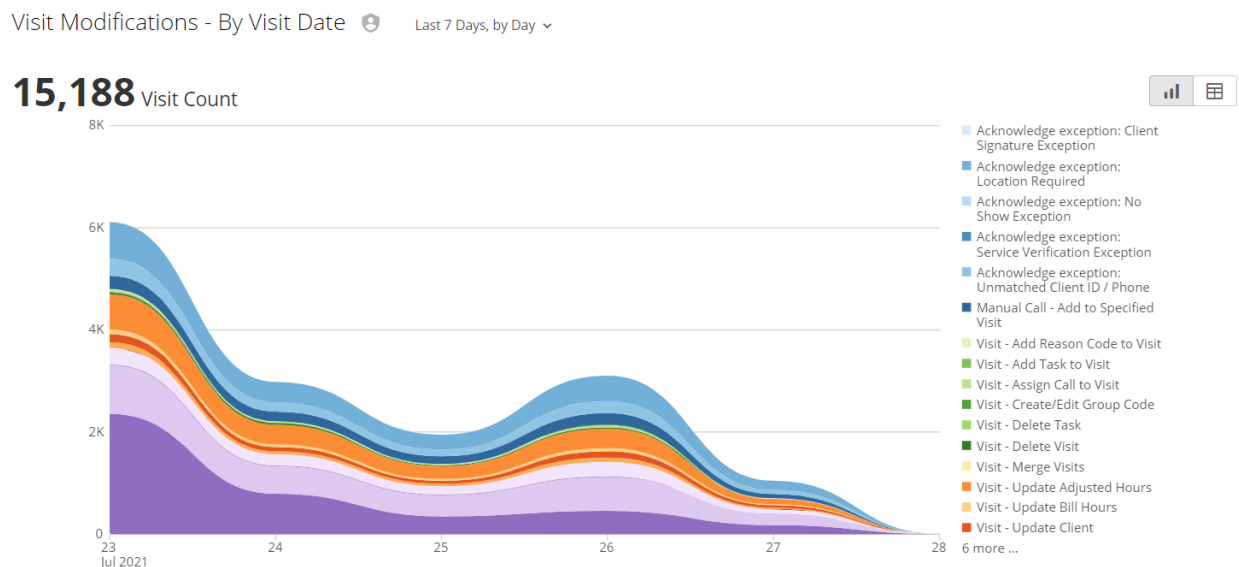- Latitude
- Longitude
- Visit Status

Visit Modifications – By Visit Date

Visit modification activity shown over time.

Purpose

This chart displays the types of updates being done to visits within Visit Maintenance. Upon drill through, the user will have an understating on accounts that are using that activity most in that same time period.

This card can be used to determine which types of changes are being made most often to a visit. For example, in the visual above, 'Visit – Add Visit' is dominant. This indicates that visits are not being captured by EVV but rather manually entered. For each agency, the drill down to the funnel can identify the top agencies using this particular feature.

Visit Modifications - By Visit Date   Last 7 Days, by Day

15,188 Visit Count

Legend:
- Acknowledge exception: Client Signature Exception
- Acknowledge exception: Location Required
- Acknowledge exception: No Show Exception
- Acknowledge exception: Service Verification Exception
- Acknowledge exception: Unmatched Client ID / Phone
- Manual Call - Add to Specified Visit
- Visit - Add Reason Code to Visit
- Visit - Add Task to Visit
- Visit - Assign Call to Visit
- Visit - Create/Edit Group Code
- Visit - Delete Task
- Visit - Delete Visit
- Visit - Merge Visits
- Visit - Update Adjusted Hours
- Visit - Update Bill Hours
- Visit - Update Client
- 6 more ...

What the card shows

Each type of modification made is represented in the chart by a different area, which is color coded. The legend on the right-hand side of the screen will list all modifications that had at lease one instance during the reporting period. Please note that not all modifications on the screenshot below will be applicable to the program, as these will depend on the business rules and configuration used for the program.

The visit modification types shown are driven by the visit update information captured by Sandata EVV. While these appear to have similar names to the exceptions set for the program, these are actually the permissions/functions available to the user to update fix and fix exceptions. For example, if a visit has the Unknown Client exception, the 'Visit – Update Client' would generally be used to 'fix' that exception.

By default, this card will show data for last 7 days from current date.

Drill Path

When a specific activity is selected, the drill through will take users to a funnel chart which the provider who performed the activity selected and their total number of visit modifications. Users also have access to underlying data where they can filter further.

Visit Modifications by Account
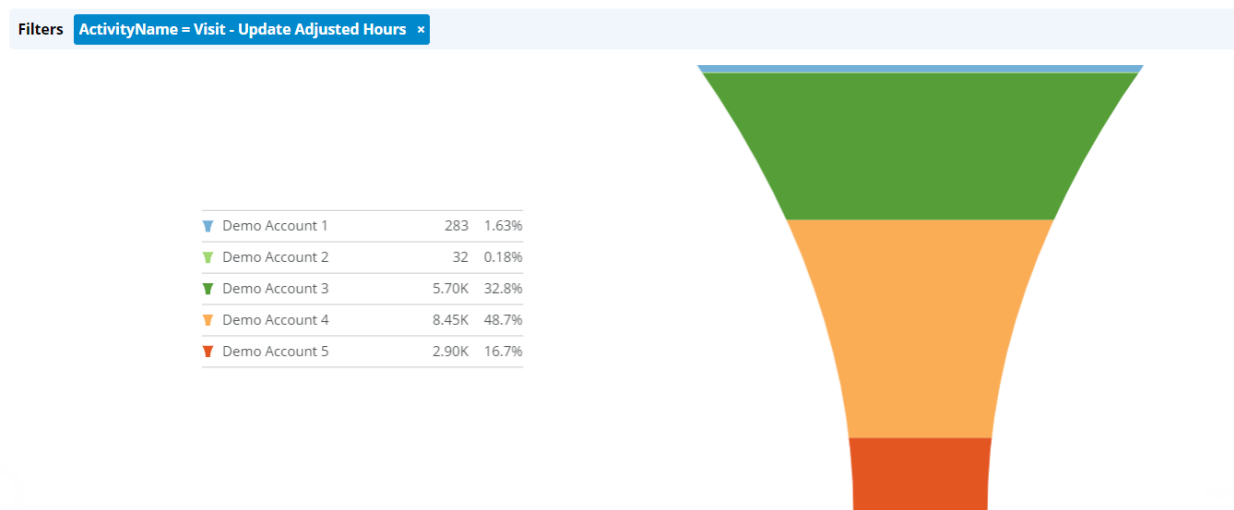
Clicking on the slice for a particular provide will result in the Visit Log Detail view. This data table will show visits for a specific modification activity and specific account name based on the prior selections. This view will be of particular interest as it also lists the Reason Codes used by the provider (if applicable) to document the change. This may be helpful in identifying opportunities for outreach.

Below is a partial screen shot of the visit detail view, displaying the data points that are available.

Key attributes

- Account Name
- Activity Name
- In Call (Date Field)
- Service

Client Visit Conflicts

Summary of clients with overlapping visits in a calendar view.

Purpose

This card helps to identify potential issues with visits within and across provider agencies. The calendar below shows the number of conflicts identified on a daily basis. A conflict is defined as the same client (based on Client Medicaid ID) having 2 visits for the same service which overlap.
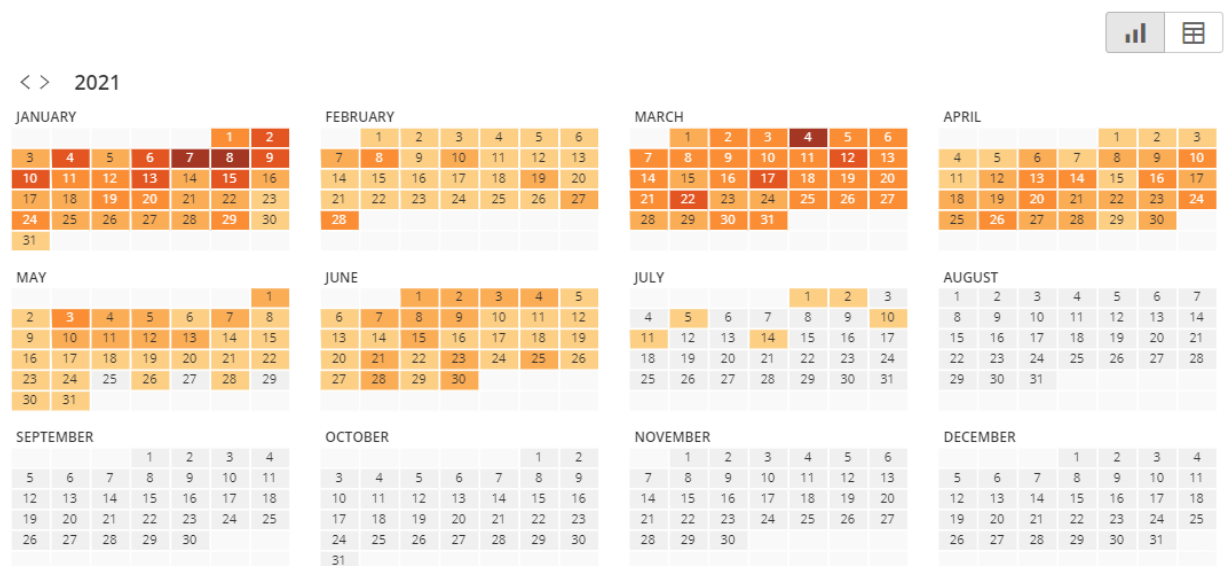
Quick Filters

- Conflict_Description

What the card shows

This card identifies potential issues with services provided and may point to potential fraud if a service does not appropriately allow for a given service being provided simultaneously. Note that this case could be legitimate in the case of a visit where the ratio properly reflects that the client should have more than one caregiver in attendance at the same time.

Hovering over any given day will display the number of conflicts that were identified on that day. Notice that the card is using color density to quickly identify those instances where the number of conflicts spike as the color intensifies. This will be helpful in determining trends and patterns.

Drill path

By selecting a day from the calendar, the user will be taken to the Conflict Summary by Client view. This view identifies the visit date, the name of the client and the number of conflicts.

Below is a screenshot that includes the headers in the Conflict Summary by Client view.

Conflict Summary By Client 🛡

Warning: Not all the data is shown.

| Filters | Visit Start Date is between 03/23/2021 12:00 AM and 03/... × |

Visit Start Date	Client SSN	Client Full Name	Conflicts

Clicking on the name of the client will drill down to the Visit Conflicts Detail. This view shows detailed visit information, which includes the in and out times of the two conflicting visits.

Below is a partial screen shot of the visit detail view, displaying some of the data points that are available.

Visit Conflicts Detail 🛡

| Filters | Visit Start Date is between 03/23/2021 12:00 AM and 03/... × |

Provider Medicaid ID	Employee Full Name	Actual In Time	Actual Out Time	Client Full Name	Conflicting VisitKey	ConflictInTime	ConflictOutTime	Service

Key attributes

- Account
- Client Medicaid ID
- Employee Full Name
- Actual In Time
- Actual Out Time
- Conflict In Time
- Conflict Out Time
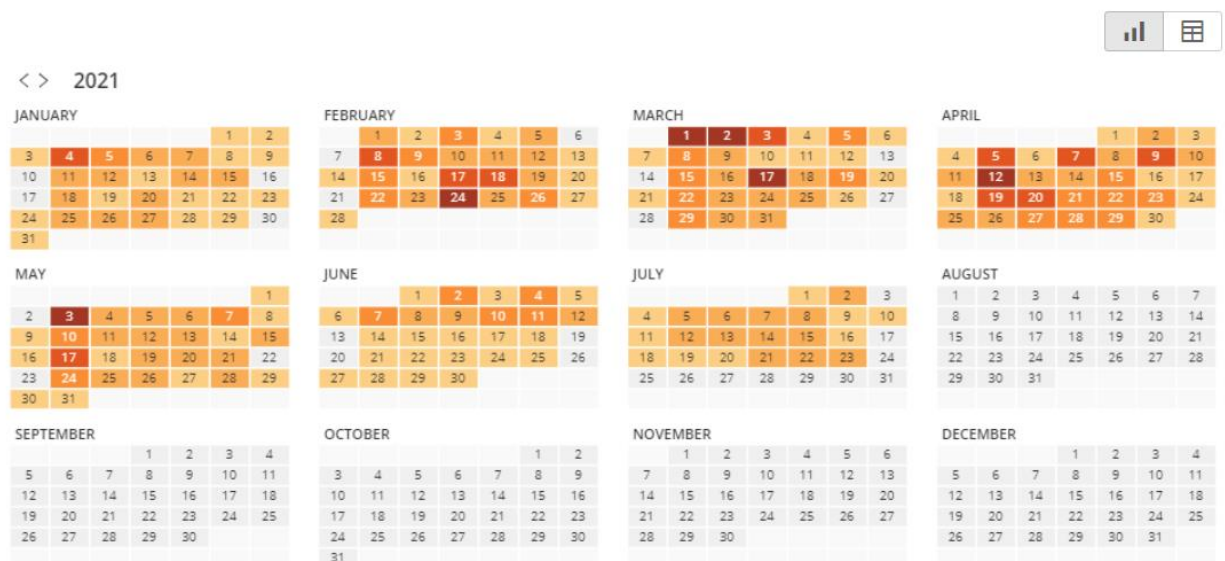
Employee Visit Conflicts

Summary of employees with overlapping visits in a calendar view.

Purpose

This card can be used to identify issues with caregivers. Some of the issues which can be seen include the same worker who is providing services across multiple agencies at the same time and a worker who is providing overlapping services within the same agency. Excluding group visits where the worker could be legitimately providing services for multiple clients within a single agenc6y at the same time, this generally indicates an issue

Quick Filters

- Conflict_Description
- Employee Full name

What the card shows

This card identifies potential issues with services provided and may point to potential fraud if a service does not appropriately allow for a given service being provided simultaneously. Note that this case could be legitimate in the case of a visit where the ratio properly reflects that the client should have more than one caregiver in attendance at the same time.

Hovering over any given day will display the number of conflicts that were identified on that day. Notice that the card is using color density to quickly identify those instances where the number of conflicts spike as the color intensifies. This will be helpful in determining trends and patterns.

Selecting a day on the grid will drill down to the summary by day per employee.

Drill path

By selecting a day from the calendar, the user will be taken to the Conflict Summary by Employee view. This view identifies the visit date, the name of the client and the number of conflicts. This view can be used to determine if a particular employee is regularly showing up with conflicts.

Below is a screenshot that includes the headers in the Conflict Summary by Employee view.

Conflict Summary By Employee 👤

Warning: Not all the data is shown.

Filters Visit Start Date is between 03/24/2021 12:00 AM and 03/... ×

Visit Start Date	Employee SSN	Employee Full Name	Conflicts

Clicking on the name of the client will drill down to the Visit Conflicts Detail. This view shows detailed visit information, which includes the in and out times of the two conflicting visits.

Below is a partial screen shot of the visit detail view, displaying some of the data points that are available.

Visit Conflicts Detail 👤

Warning: Not all the data is shown.

Filters Visit Start Date is between 03/24/2021 12:00 AM and 03/... ×

Provider Medicaid ID	Employee Full Name	Actual In Time	Actual Out Time	Client Full Name	Conflicting VisitKey	ConflictInTime	ConflictOutTim

Key attributes

- Account
- Client Medicaid ID
- Employee Full Name
- Actual In Time
- Actual Out Time
- Conflict In Time
- Conflict Out Time

Daily Visits Over X Hours

Employees working more than 8 hours per day (default but variable)

Purpose

The main goal of this card is to identify employees who have worked more than 8 hours per day across all providers.
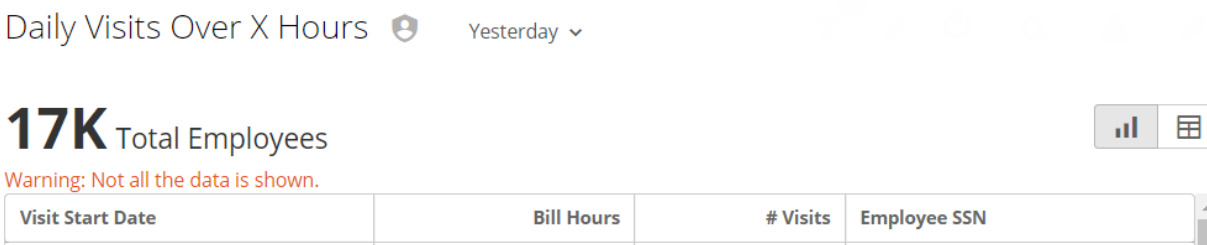
This information can be used to allow further exploration of an employee's activity, specifically in understanding when overtime may be a factor. This card can also be used to potentially identify staff shortages in particular agencies. It may also be used to identify caregivers who may be working more hours than desirable because they are employed with multiple agencies.

Below is a screenshot of the card, which includes the header that are available in this card.

Daily Visits Over X Hours 🛡   Yesterday ⌄

17K Total Employees

Warning: Not all the data is shown.

Visit Start Date	Bill Hours	# Visits	Employee SSN	

Quick Filters

- Bill_Hours (by default, greater than 8)

What the card shows

The key information on this card is the visit date and the total billed hours for the employee. The number of hours defaults to 8 and can be changed as needed, by using the Quick Filters (or the 'Bill Hours' on the top left).

The total number of employees falling into this category will be displayed on top left of the card. The user will be able to select a specific employee to view the details of services provided by that employee.

Selecting a particular row will drill down into the detail of all visits identified for that day.

Key attributes

- Employee SSN
- Bill Hours
- Visit Start Date

Weekly Visits Over XX Hours – Previous week

Employees working more than 40 hours in the previous week (default but variable)

Purpose

The main goal of this card is to identify employees who have worked more than 40 hours per week across all providers.   This information can be used to allow further exploration of an employee's activity, specifically in understanding when overtime may be a factor.

This card can also be used to review overtime within a given agency and caregivers who are working and excessive number of hours either within an agency or across agencies.

Below is a screenshot of the card, which includes the header that are available in this card.

Daily Visits Over X Hours 👤   Yesterday ⌄

17K Total Employees

Warning: Not all the data is shown.

Visit Start Date		Bill Hours	# Visits	Employee SSN	

Quick Filters

- Employee SSN
- Employee Full Name

What the card shows

The key information on this card is the visit week and the total billed hours for the employee. The number of hours (40) is pre-defined but it can be changed by the user to a different value using the Quick filters panel.

The total number of employees falling into this category will be displayed on top left of the card. The user will be able to select a specific employee to view the details of services provided by that employee.

Selecting a particular row will drill down into the detail of all visits identified for that day.

Key attributes

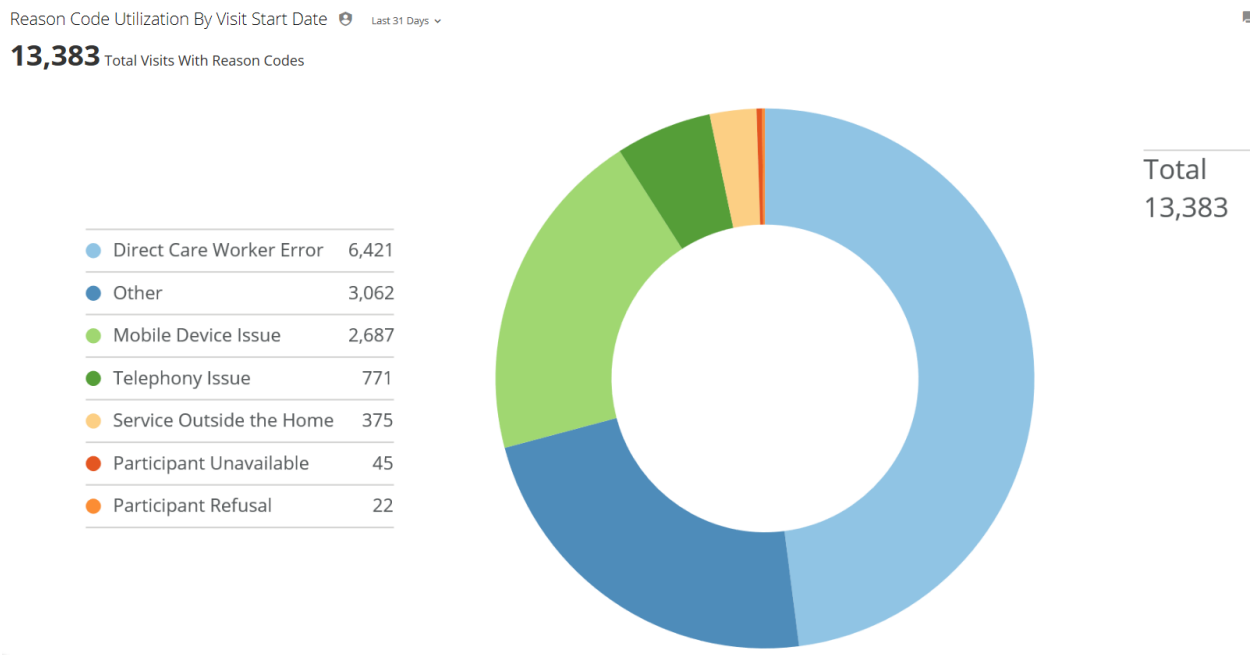- Employee SSN
- Bill Hours
- Visit Week

Reason Code Utilization by Visit Start Date

Total number of visits with reason codes and distribution of those codes

Purpose

This card enables users to have a quick understanding on how different reason codes are being applied by providers when making changes and updates to visits. By default, this card shows the usage of reason codes over the past 31 days.

Reason code utilization is particularly interesting to view how the program is evolving. Early in the program, it is expected that reason code utilization will identify areas where additional outreach and training may be of value. As the program evolves, the information will be helpful to determine compliance with the overall program.

Reason Code Utilization By Visit Start Date 🌐   Last 31 Days ˅

13,383 Total Visits With Reason Codes

Reason Code	Count
● Direct Care Worker Error	6,421
● Other	3,062
● Mobile Device Issue	2,687
● Telephony Issue	771
● Service Outside the Home	375
● Participant Unavailable	45
● Participant Refusal	22

Total
13,383

What the card shows

The list of the reason codes applied will be shown at left side of the card along with the number of times the reason code was used. Only the top selected codes will be shown. All others will be grouped into the 'other' category.

Upon clicking a particular reason code type from the chart, the user will be able to see the underlying detailed changes with their assigned reason codes.   Note that there is no direct relationship between applied reason codes and the exceptions or changes that they address.

When drilling to the lowest level, the system is displaying log information for each change: the visit as it existed when the change was made versus the current state of the visit. A single visit may appear multiple times depending on the number of changes applied. Of particular interest is

the 'ReasonCodeDesc' which shows any additional information entered by the user when applying the reason code.

Key attributes:

- Activity Name
- Call In Type
- Client Medicaid Id
- Employee Id
- Call In (Date field)
- Provider Medicaid Id
- Reason Code Description
- Reason Code Memo
- Resolution Code
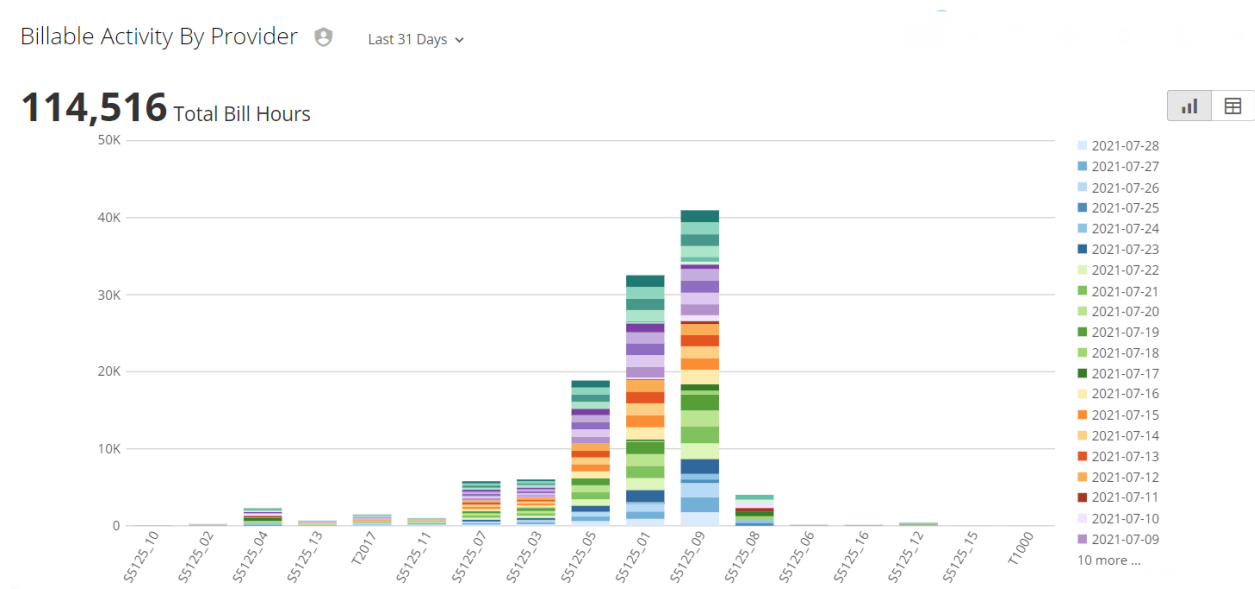- Visitkey – unique identifier of the visit in the Sandata System

Billable Activity By Provider

Visits in a billable state by service and date

Purpose

This card provides a summary of verified visits that are in a verified status (no exceptions which have not yet been matched to a billed visit by Claims Validation) by service for the past 31 days. The user can see which services have the most activity on a day-to-day basis.

This information can be useful to determine the total outstanding EVV activity that has not yet been billed (or gone through adjudication successfully when compared to EVV data). It may also help in identifying those provider that may not be billing in a timely fashion.

Billable Activity By Provider · Last 31 Days ⌄

114,516 Total Bill Hours

Legend (Visit Start Date):
2021-07-28, 2021-07-27, 2021-07-26, 2021-07-25, 2021-07-24, 2021-07-23, 2021-07-22, 2021-07-21, 2021-07-20, 2021-07-19, 2021-07-18, 2021-07-17, 2021-07-16, 2021-07-15, 2021-07-14, 2021-07-13, 2021-07-12, 2021-07-11, 2021-07-10, 2021-07-09, 10 more …

What the card shows

By default, the user will be able to see visits in a verified state for the last 31 days; however, the user will be able to modify the reporting date range. The total number of visits will be listed on the top left.

This visual has three dimensions: the X axis will display different services using their HCSPCS code, while the Y axis will show the number of visits. The different colors used in each bar represent Visit Start Date.

Key attributes

- Total Visits
- Visit Start Date
- Service

Current Visit Exceptions

Application of different types of visit exceptions over time

Purpose

This card show the types of exceptions being applied to visits and may pinpoint areas where additional intervention and training are required.

As visits are fixed in visit maintenance, the numbers will decline. Assuming visit maintenance is being done shortly following the visit activity, numbers at the beginning of the period shown should be less than numbers at the end of the period.
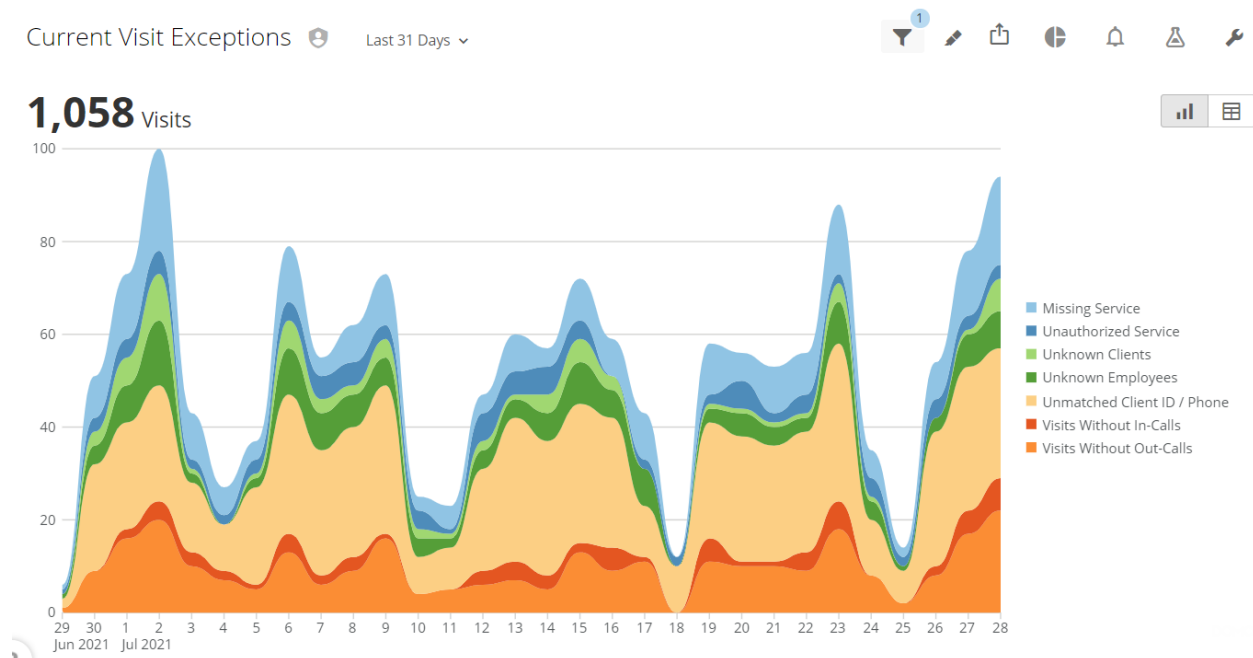
Quick Filters

- Acknowledgement

What the card shows

For the period selected, this card shows the current application of all program exceptions, showing how much visit maintenance work is needed by providers (both Sandata EVV and Alt EVV) and which exceptions are more prevalent than others. By default, this card will show the last 31 days of data.

Note: The unknown client exception will not be shown on this chart. The client must be known to guarantee that the client belongs to the payer or the information will not be available.

Exceptions which have been resolved (fixed or acknowledged) will not be shown. Upon selection of an exception from the chart, a drill thru function will show a horizontal bar chart to distinguish different types of Call In types by weeks for the selected exception. The user will be able to select a call type and week to view the exception information for the selected visit.

Drill Path

Selecting any of the exceptions will filter further showing the exception by call in type per week. Upon selection of an exception from the chart, a drill thru function will show a horizontal bar chart to distinguish different types of Call In types by weeks for the selected exception.
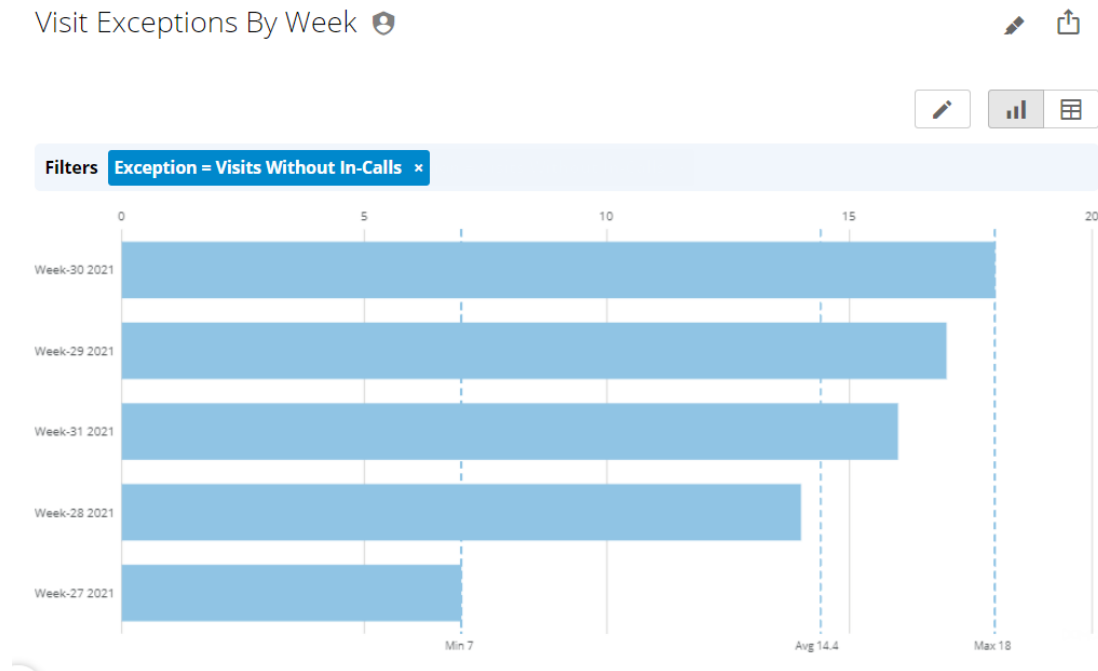
The user may select the bar for the corresponding week of service to explore further. This will display the Visits Exceptions by Day view.
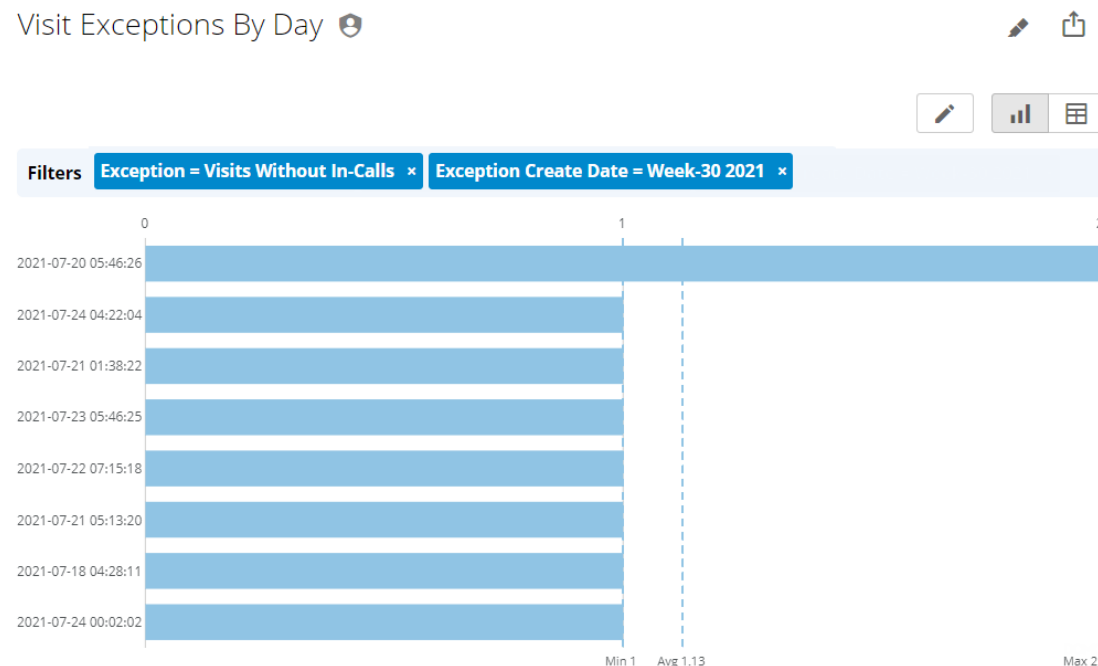
The Visit Exceptions by Day shows all the visits with an exception created in the week previously selected. This card displays a bar per date/timestamp.

Clicking on any bar will drill-down to Visit Exceptions Detail. This view lists the client and employee associated with the visit, the visit start date, the exception associated with the visit and acknowledgement indicators.

The screenshot below shows the data points that are available in the view.

Visit Exceptions Detail

Filters	Exception = Visits Without In-Calls ×	Exception Create Date = Week-30 2021 ×	Exception Create Date = 2021-07-20T05:46:26 ×					

Account	Account Name	VisitKey	Exception	RecCreateDate	Acknowledgement	Client Full Name	Employee Full Name	Visit Start Date

Key attributes

- Account Name
- Exception
- Visit Start Date
- Call In Type