CT-DSS Electronic Visit Verification and Visit Data Aggregation Program

Sandata Agency Management
Client Bulk Upload Instructions

Sandata

Adding CT-DSS Non-Waiver Home Health Clients using Client Bulk Upload

Who

These instructions are specific for the Connecticut Department of Social Services (“CT DSS”) Home Health (HH) Providers using the Sandata Santrax Agency Management system for Non-Waiver HH Electronic Visit Verification (EVV) data management and services. Providers electing to use Sandata Agency Management will receive training on system features and functionality, and this guide will help with the uploading of your clients (“members”) into Sandata Agency Management.

What

As requested by CT DSS, Sandata has agreed to allow providers to use this Client Bulk Upload feature on a one-time basis and a minimum of 50 clients to load, to ease the onboarding and data setup that providers must go through in preparation to collect and manage EVV visit data to meet the 21st Century Cures Act requirements for Non-Waiver HH services (HH).

Attached is the sample spreadsheet and specifications that will be used with these instructions. After the successful upload of your Non-Waiver HH clients, providers will be able to manually maintain and enter new clients using the Sandata Agency Management Client Edit screens.

Please note: Non-Waiver clients are identified as clients who are NOT enrolled in the Connecticut Home Care (CHC), Acquired Brain Injury (ABI, Personal Care Assistant (PCA), and Autism (AUT) Waivers.

Warning:
Providers must take care and use extreme caution when uploading clients.
The data needs to be complete, accurate and error free. Ideally, these will be new clients that do not already exist in your Sandata Agency Management account. If a client is uploaded that already exists, you will overwrite that client information and potentially corrupt data and existing relationships to authorizations, schedules, visits, and billing records. Furthermore, a slight variation in the existing client data could result in a duplicate client being created.

Providers must not use this feature for existing clients, but rather, must use the Client Edit screens in Sandata Agency Management to make changes to existing clients.

Sandata is not responsible or liable in any way for any cause of action for data inaccuracies or data corruption of existing clients resulting from the use of the Client Bulk Upload spreadsheet data as provided, either intentionally or unintentionally. Repairs and data corrections may require extensive time and resources.

How

To begin the Bulk Upload Process:

1. During Provider training, a link to Sandata on Demand (SoD) will be provided to download the instructions and the Client Bulk Upload spreadsheet. The link will be available in the presentation slides and meeting chat.
2. After downloading the spreadsheet, review these instructions and edit the spreadsheet. The spreadsheet has the specific layout and data requirements for each client record being uploaded.
   Please note: The column headers **must** remain in the spreadsheet and in the order they appear. The first data row is a sample and must be removed so that it is not included with your live client data.
3. Collect your client data and enter each client in a separate row on the spreadsheet. Continue this process until you have collected and entered all the clients you want to upload for your Non-Waiver HH client roster.
4. Please review your spreadsheet and ensure the data is accurate and error free. Please make sure the required fields are populated and any field restrictions are followed, such as: no special characters where they are not allowed and no duplicate rows of data. This data will be what you see in the Client Edit screens once the upload has been successfully completed.
5. Next you will use the Webform on SoD to submit your information and the spreadsheet. This will create a Support ticket (save this ticket number for future reference). Please include the following information:
   A. Subject line would be "Client Bulk Upload Request"
   B. Include Sandata Account number, contact information, and other information requested in the form.

   Or, if you are resubmitting the spreadsheet with error corrections, please include:
   A. Subject line would be "Client Bulk Upload Resubmission"
   B. Include the original Support Ticket Number, Sandata Account number, contact information, and other information requested in the form.

   Please note: Submitting (or resubmitting) the spreadsheet using the Webform provides the encryption and security needed for transmitting data and to avoid HIPAA compliance violations.

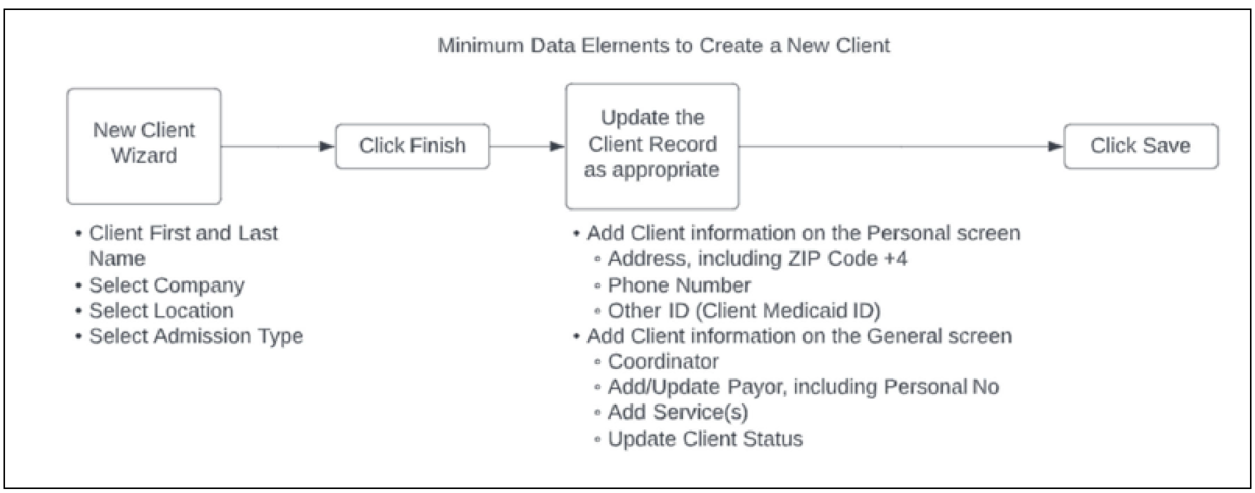
6. Sandata Tier 1 Support staff will check to see if the provider has already successfully used the spreadsheet once, reject the request and reply. If this is a resubmission (reference initial ticket) to an “errors found” reply, they will review the file to see if the errors are fixed. If there are no errors or this is an original request, the information is passed on to the next step. If there are errors, you will see a response to the ticket, requesting that you complete the above Step 4 and then Step 5 again, until the spreadsheet is error free.
7. The Support ticket request and associated spreadsheet will be processed by Sandata Tier 3 Support and Data Administrators to review the spreadsheet, validate formatting and if the required fields have been provided. If there are errors, a report is returned to Tier 1 Support to share with the requestor. If there are no detectable errors from the review, the spreadsheet is processed to upload the data from the spreadsheet. This process typically takes between 5 – 10 days. Once this process is complete, you will receive a response to the ticket acknowledging the completion of the upload.

After you receive a completion response, please follow the instructions below to verify your clients, make manual edits, and to enter new clients.

Please note: You should have received Client Edit screen training. The following information should be familiar.

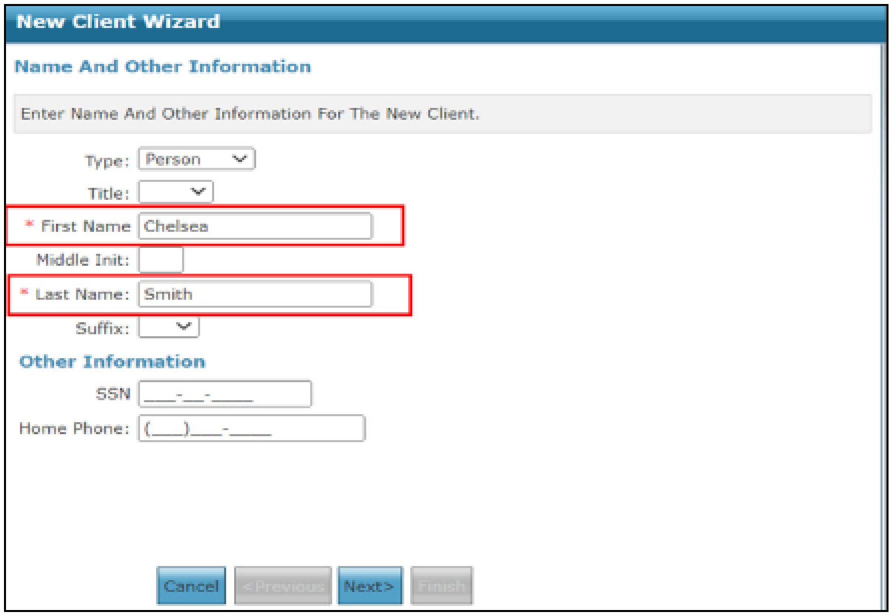
Where

The graphic below shows the Sandata Agency Management Client screen navigation flow for creating (and editing) your Non-Waiver HH clients. The screens also allow you to verify the data uploaded via the Client Bulk Upload spreadsheet process.

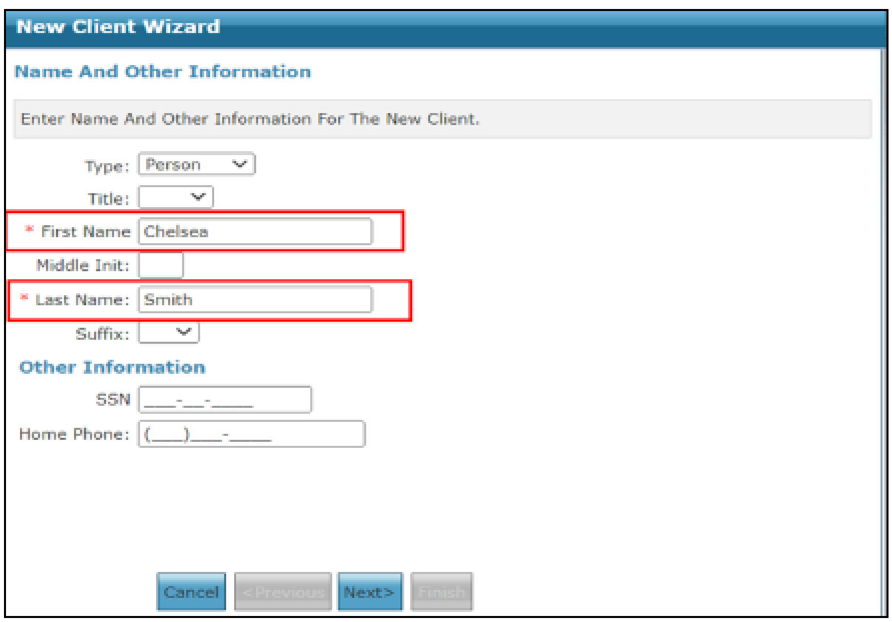


The following steps and screenshots detail the minimum data elements required for a provider to manually create a new client for Non-Waiver HH Services:

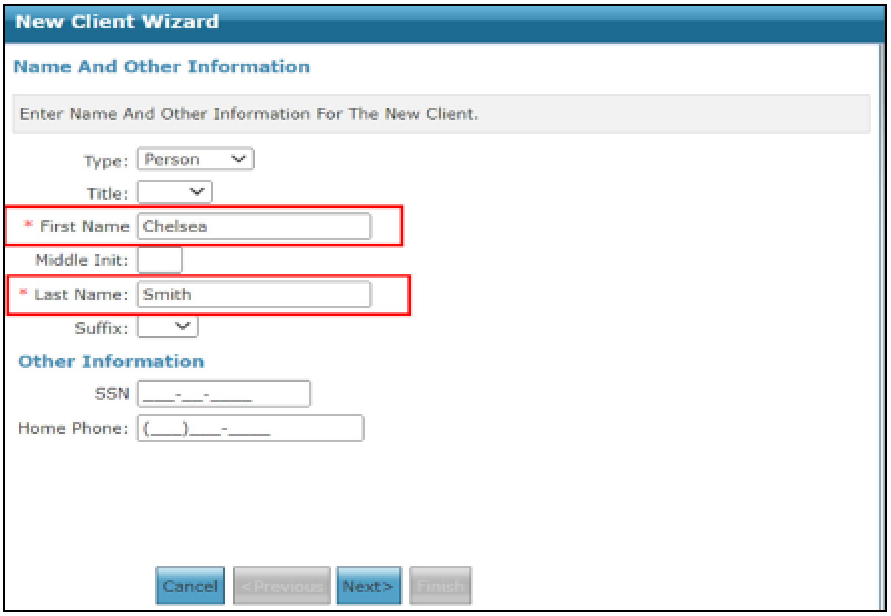
1. Enter the Client First and Last Name.



2. Select the Applicable Company.

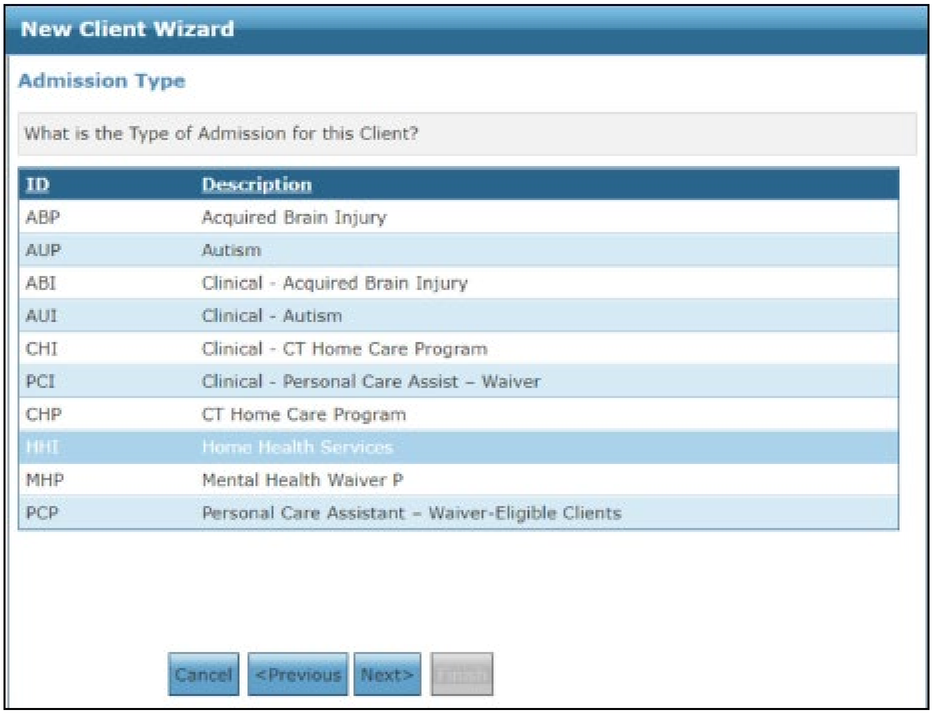


3. Select the Applicable Location (Only select one location, providers can alter the client's location post manual input).



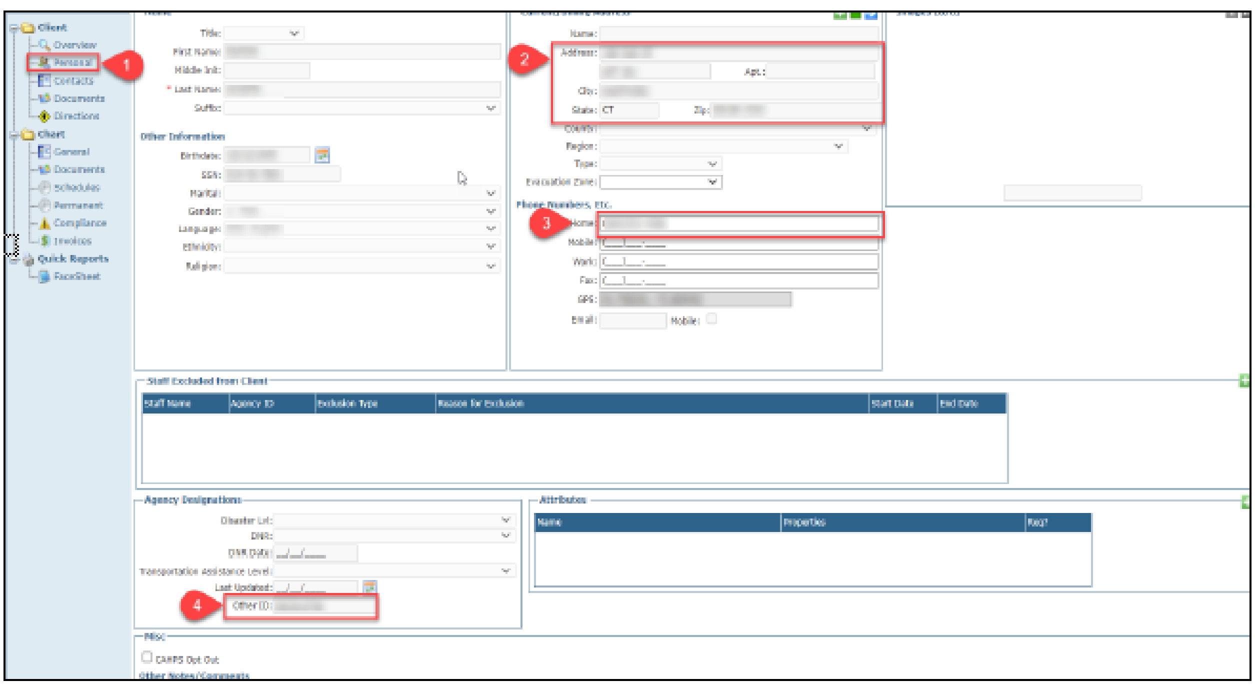
4. Select the Applicable Admission Type.

5. Choose any applicable additional options on the Finished Screen.

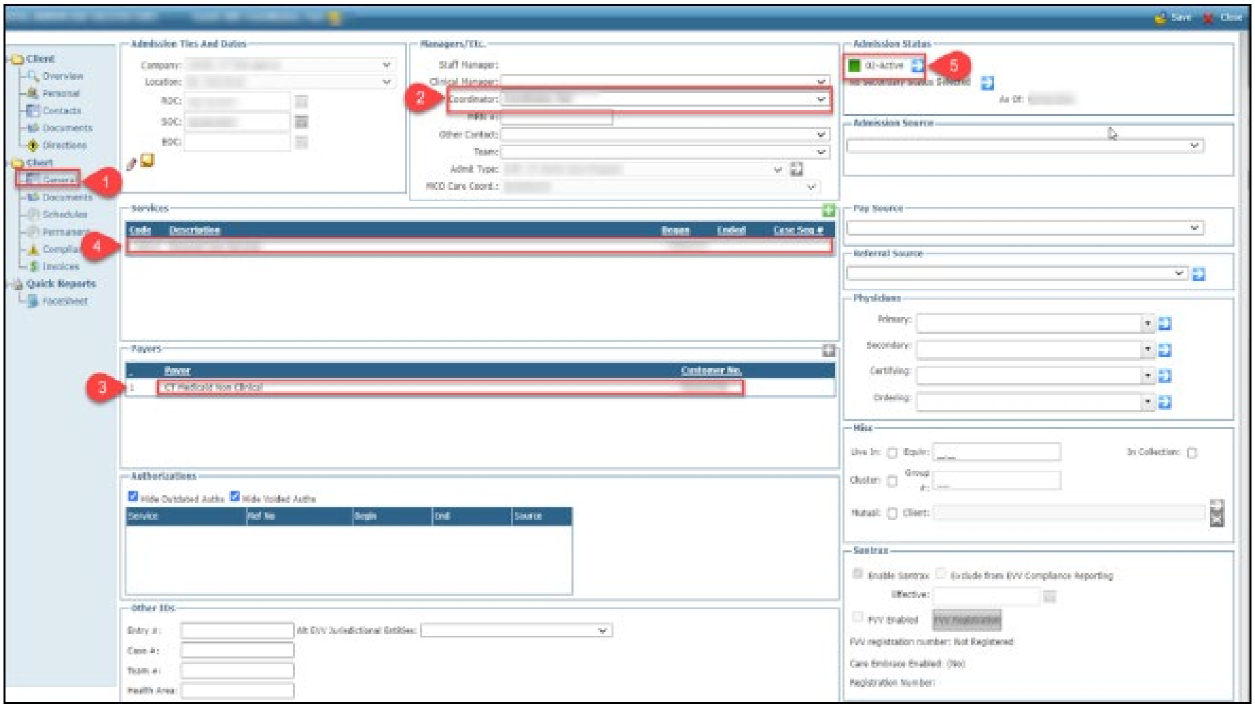


When “Finish” is selected on the New Client Wizard, the client record will open, allowing the user to add the following additional client information to the client record tabs:

1. Personal tab
   A. Address, including ZIP Code +4 (can be multiples)
   B. Phone Number (can be multiples)
   C. Agency Designation > Other ID (this is the Client Medicaid ID)



2. General tab
    A. Coordinator
    B. Add/Confirm the Payor
    NOTE: the CT DSS Payor should already be populated based on the new Admission Type selected in the New Client Wizard
    C. Add Service(s)
    D. Update Admission Status as appropriate



Last, the Medicaid ID is entered in the client record, after initial client creation (where the ID is entered will depend on CT requirements, previous this has been the Other ID field).