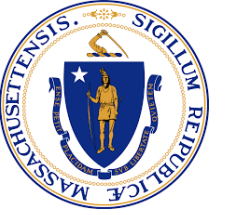




Sandata EVV Town Hall Massachusetts EOHHS

Tuesday, June 25, 2024





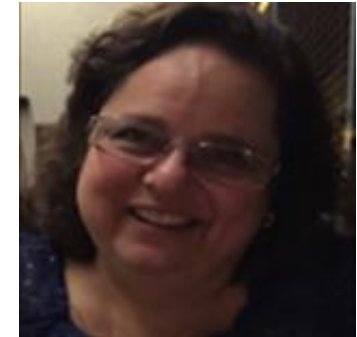
Town Hall Presenters



Annemarie Hull
Sandata
Project Manager



Jim O'Brien
MassHealth
Director of Federal EVV Compliance



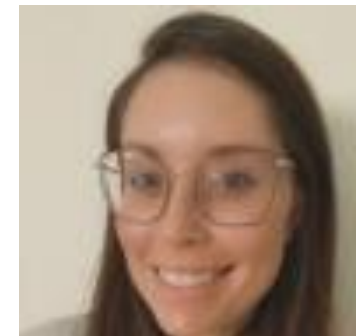
Judy Ross
Sandata
Program Design Lead



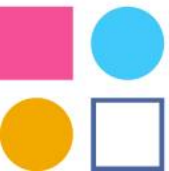
Ford Simpkins
Sandata
Solution Architect

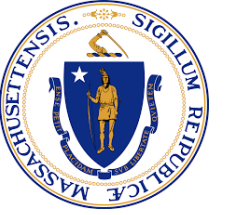


Fay Beaubien
Sandata
Product Management Director

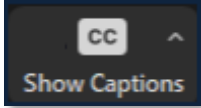


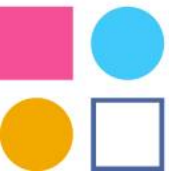
Sam Howe
Sandata
Customer Enablement Lead

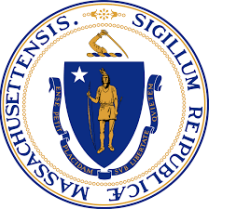




Meeting Etiquette

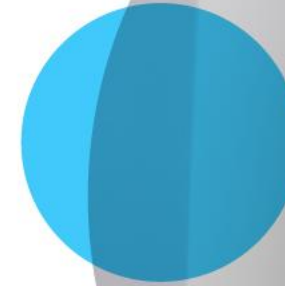
- ▶ Please keep your cameras and microphones off as we cover the information today
- ▶ This session is being recorded and the recording and presentation will be available at Sandata on Demand, one of Sandata's learning portals
 - ▶ Parts of this recorded session may be used as an EVV training resource
 - ▶ We will also add a link to the [EOHHS EVV webpage](#) to the same content
- ▶ The Caption feature is available by selecting 'Show Captions' on your tool bar 
- ▶ If you have questions....
 - ▶ Please enter your questions using the 'Q&A' feature at the bottom of your screen
 - ▶ Questions will be addressed either during the meeting or afterward
 - ▶ All questions will be available on a Q&A document that will be accessible via the [EOHHS EVV webpage](#)
 - ▶ You can also submit questions to EOHHS directly at EVVfeedback@Mass.gov
- ▶ After today's town hall, your feedback is needed on today's presentation. Please take a few minutes to complete this so we can work to expand future events to ensure you have the information needed





Agenda

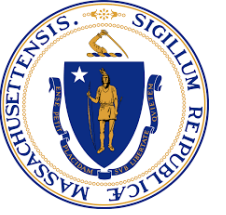
- EOHHS Program Overview
- Sandata: Who We Are
- Introduction to Sandata EVV
- Introduction to Alternate EVV
- Provider Self-Registration Portal
- Provider Training Options
- Next Steps
- Appendix





Program Overview





The CURES Act & What is EVV

EVV is a computer-based system that electronically documents and verifies service delivery information for certain Medicaid service visits. EVV helps prevent fraud, waste and abuse while making sure Medicaid recipients receive care that is authorized for them.

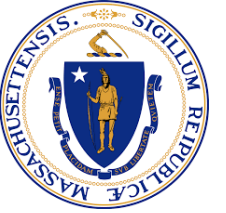
Electronic Visit Verification (EVV) is a federal requirement for Medicaid-funded **personal care and home health services that require an in-home visit**. The Executive Office of Health and Human Services (EOHHS) administers the Massachusetts Medicaid program known as EOHHS. EOHHS oversees the implementation and operation of EVV in programs that provide certain home and community-based services.

Section 12006 of the 21st Century Cures Act is the law that requires all 50 states to implement EVV in Medicaid programs for personal care and home health services.

In Massachusetts, EVV impacts certain services overseen or covered by:

- EOHHS/MassHealth
- The Executive Office of Elder Affairs
- The Massachusetts Rehabilitation Commission





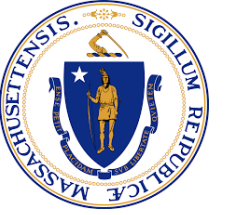
Who is required to use EVV?

EOHHS has identified certain services as required for EVV—these include services that are or are related to personal care services and home health services. Providers of these services will be required to use EVV.

EVV Services (not exhaustive)

- Personal Care services (agency) provided in a home setting
- Personal Care Attendant (PCA) services (self-directed)
- Group Adult Foster Care services (not including GAFC providers who are also Assisted Living Residences (ALRs))
- Home Health services involving a home visit for:
 - Home health aide services
 - Skilled nursing services, including by an RN and LPN
 - Therapies (OT, PT, SLP)
 - Home safety/independence evaluations
- Certain homemaker services provided in a home setting
- Certain companion services provided in a home setting

Note that the ABI/MFP Waiver Services in scope will be addressed on the next slide.



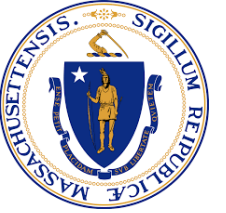
ABI/MFP Waiver Services

EOHHS has identified certain ABI/MFP Waiver services as required for EVV. Providers of these services will be required to use EVV.

ABI/MFP Waiver Services subject to the EVV requirement (not exhaustive):

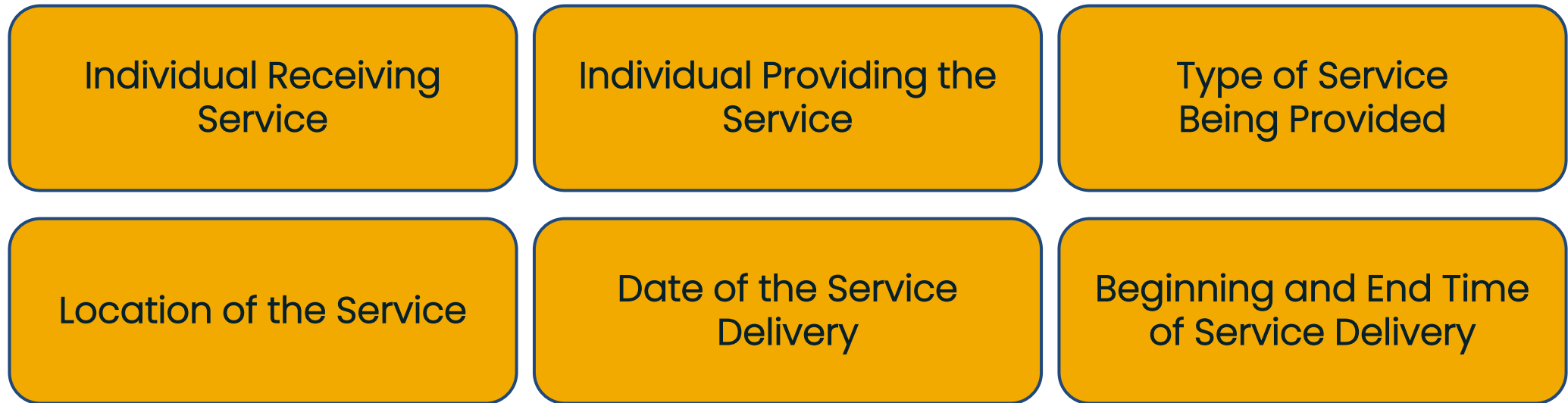
- Personal Care
- Home Health Aide
- Supportive Home Care Aide
- Skilled Nursing Services by an RN or LPN
- Physical, Occupational, and Speech Therapy visits delivered in the home

The specific EVV Service codes (HCPCS) will be updated on the [Mass.gov EVV webpage](https://www.mass.gov/evv).

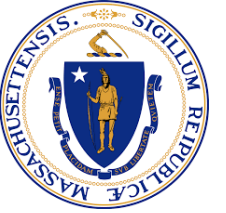


Visit Verification Requirements

The EVV system for agency-based services will include a mobile application to collect EVV data in the least burdensome way while meeting the CMS federal requirements for EVV including **electronically verifying the following information:**

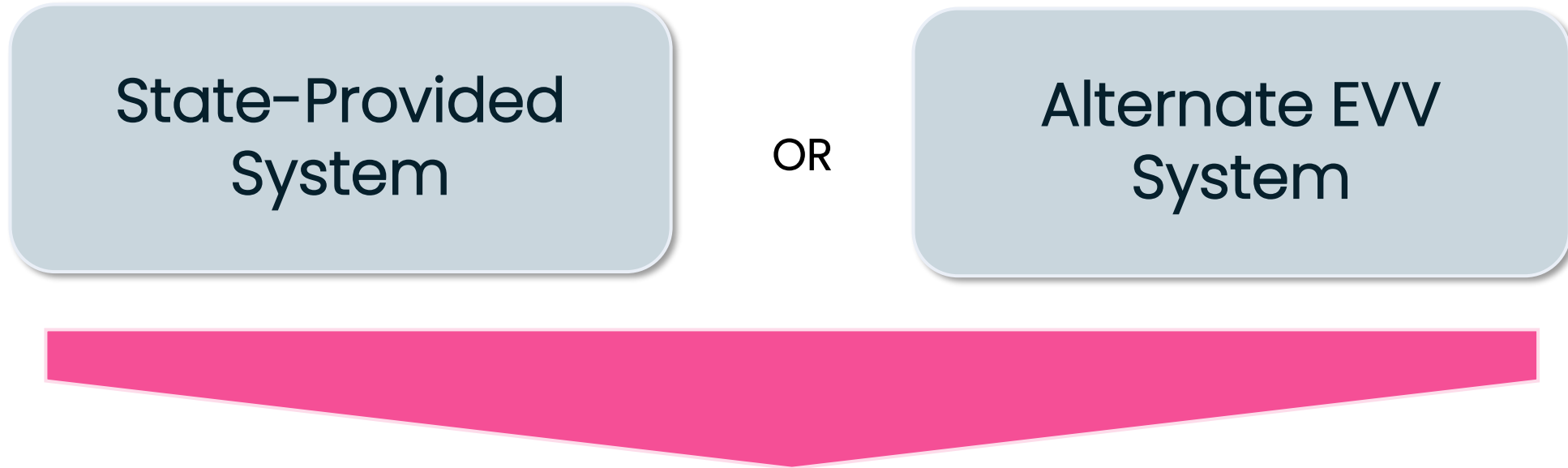


These 6 CMS EVV Requirement Elements are the EVV Requirements per Section 12006 of the CURES Act.



Open Model Solution

The EOHHS EVV Solution is an Open Model which means that providers can use their own EVV System and send their EVV-related data to the EVV Data Aggregator, or they can utilize the EVV System that the State will provide. EOHHS calls those providers utilizing an EVV system other than the State provided systems as an "Alternate EVV" (Alt EVV) provider.



All visits, either verified in the state-provided EVV System or through a provider's approved alternative EVV System, will be sent to the EVV Data Aggregator. If a provider chooses to use an Alt EVV System, they will still be required to provide all the 6 CMS EVV requirement elements.

Sandata – Who Are We?

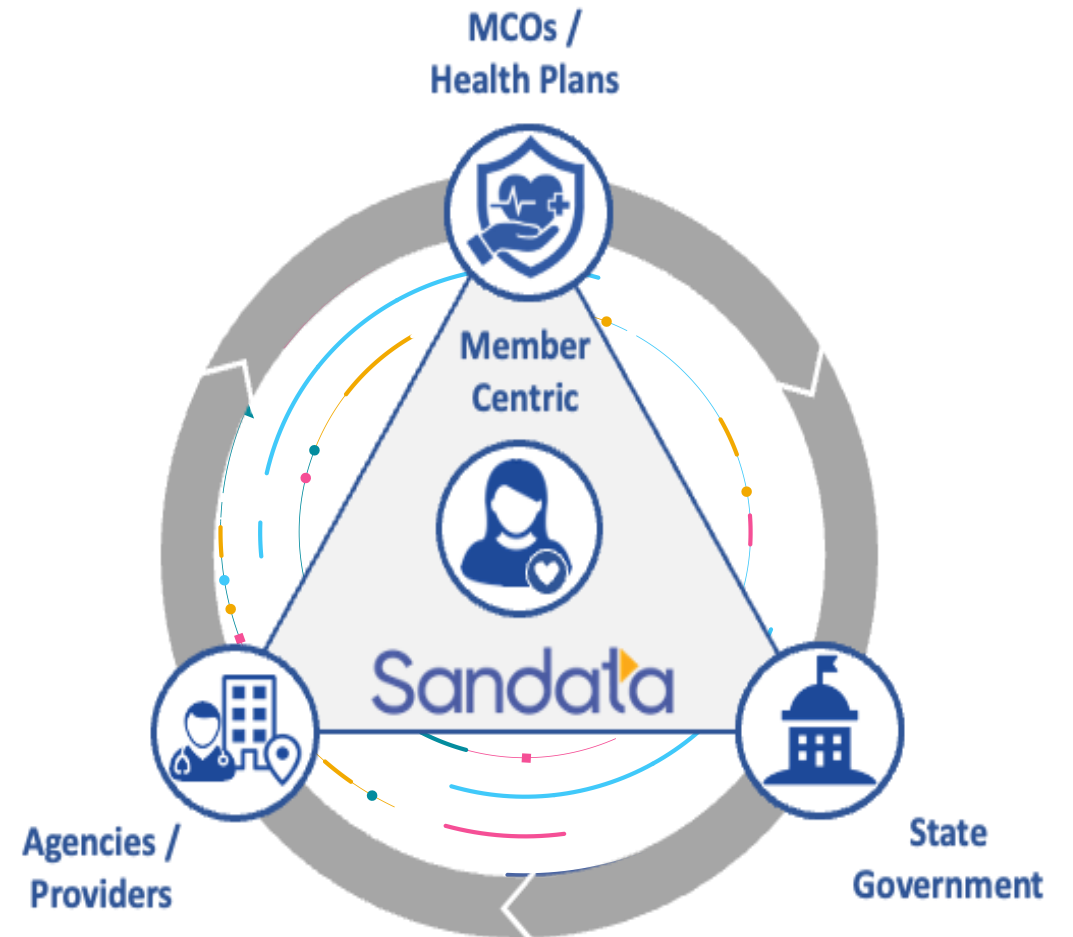


The Pioneering Force in Homecare

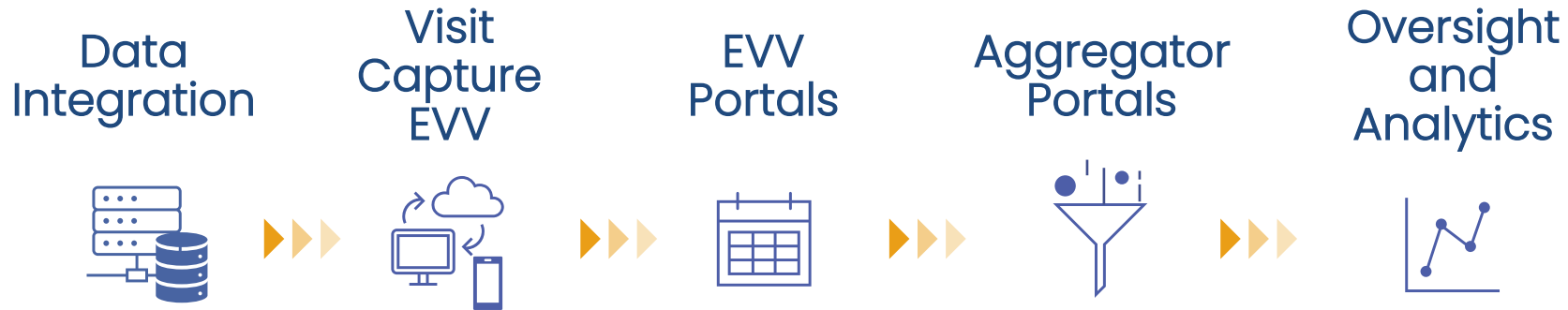
Who Sandata Helps

Sandata serves the needs of organizations across the homecare ecosystem, connecting the ecosystem through innovative technology solutions. We create a positive and lasting impact on payers, providers, employees, and those who receive care.

- ▶ Homecare Agencies
- ▶ I/DD Agencies
- ▶ Managed Care Organizations/Health Plans
- ▶ State Agencies
- ▶ Employees
- ▶ Members



Sandata Solution



Data Integration

- ▶ Information provided from the State can be used by providers to ensure their members are eligible to receiving care

Visit Capture EVV

- ▶ Multiple available EVV technologies ensure real-time visit data and verification is always available and captured at the point of care

Sandata EVV™ Portals

- ▶ Sandata EVV users can view visit data through an easy-to-use user interface to monitor activity and make visit capture corrections as required

Sandata Aggregator

- ▶ Collates and normalizes all provider data against EOHHS's business rules, regardless of which EVV system you use

Oversight and Analytics

- ▶ A variety of reports allowing provider agencies to view and export EVV activity

Providers using Sandata EVV



Sandata EVV

Your State-Supplied EVV solution!

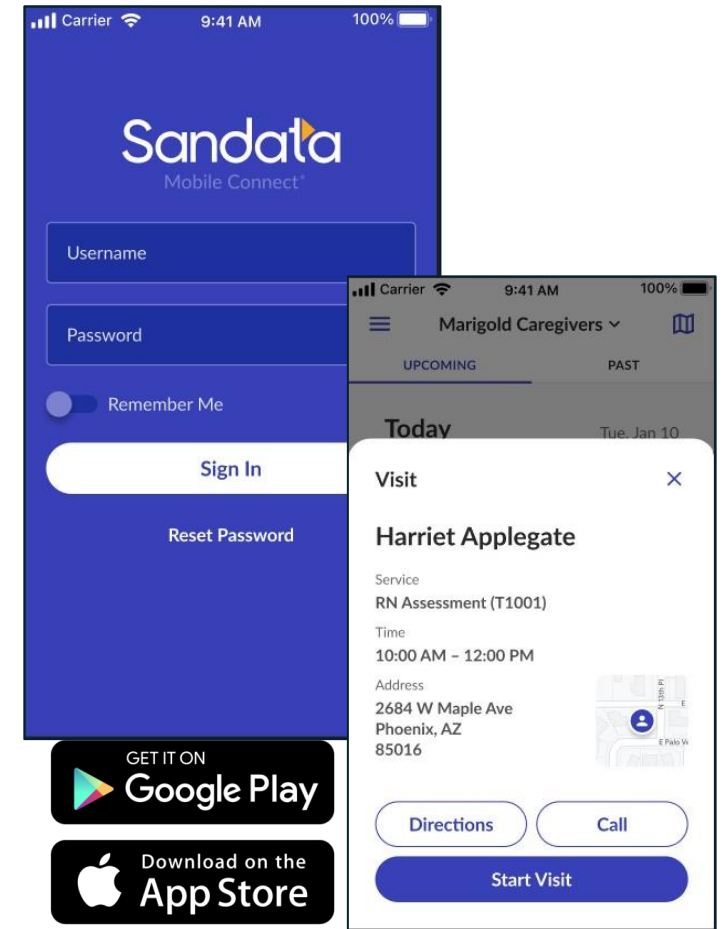
- ▶ Each provider agency will need to register with Sandata. We will review this in more detail shortly
- ▶ Provider agency administrators will complete training to gain Sandata EVV access to be able to add their employees
- ▶ Employees record visits using Sandata Mobile Connect (SMC) downloaded from Google Play or the Apple Store
- ▶ Providers can view and update visits in the Sandata EVV Visit Maintenance portal
- ▶ Member information will be supplied to Sandata by specific data sources
- ▶ Authorizations will be available from some sources to assist with scheduling



For Employee in the Field – Sandata Mobile Connect®

Sandata Mobile Connect (SMC) meets your employees and members where they are to ensure an easy-to-follow experience.

- ▶ Primary method of EVV for state programs
- ▶ Available for iOS / Android
- ▶ Works Connected or Disconnected (“Offline”)
- ▶ Captures GPS at the Start and End of the Visit
- ▶ Supports multiple languages (for the employee and member) to support diverse needs



For Provider Agency Staff: Feature Overview

Exceptions Dashboard

Allows the user to quickly view all issues that need attention.

Sandata Home Care Dashboard

Enter agency [LOG OUT](#)

Visit Counts By Exceptions | Visit Counts By Status

Date Range: Today

Visit Exceptions

Exception Category	Count
Unknown Clients	0
Unknown Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Missing Tasks	0
Late In-Call	0
Early Out-Call	0

Visit Exception Count Per Day

Exception Count

06/14

For Provider Agency Staff: Feature Overview – Continued

Member Intake

Quickly load members using only a few key pieces of data to match to the State system.

The screenshot displays the Sandata Home Care software interface. A 'New Client' modal form is open in the foreground, overlaid on a 'Clients' list. The modal form contains the following fields:

- *Required**
- Last Name***: Enter Last Name
- First Name***: Enter First Name
- Program***: Select Program (dropdown menu)
- Medicaid ID***: Enter Medicaid ID
- SSN**: [Format: ___-__-____]
- Phone**: [Format: (___) ___-____]

Buttons at the bottom of the modal are **CANCEL** and **CREATE CLIENT**.

The background shows the 'Clients' list with columns: CLIENT, AS OF, SOC, EOC, SERVI. Visible rows include:

CLIENT	AS OF	SOC	EOC	SERVI
Acosta, Cody	2/1/24	11/1/23		G0151 S9124
Aguilar, Evan	12/15/23	11/15/23		S5120
Alexander, C	028630000	2/1/24	11/1/23	G0151 S9124
Allen, Logan	2/1/24	11/1/23		S9124 T1003
Alvarado, Ric	11/1/23	11/1/23		S9123
Alvarez, Jor	11/15/23	11/15/23		S5150
Armstrong, V	11/1/23	11/1/23		G0156
Arnold, Oscar	11/1/23	11/1/23		T1001
Austin, Dallas C.	11/29/23	11/29/23		S5150
AUTH, NVAUTH	12/1/23	12/1/23		G0152
Avila, Tatum H.	12/4/23	12/4/23		S5120

For Provider Agency Staff: Feature Overview – Continued

Employee Intake

Create your employees including office staff with all their information.

The screenshot displays the Sandata Home Care software interface. On the left is a dark blue navigation sidebar with the Sandata logo and menu items: Navigation Modules, Dashboard, Clients, Employees (highlighted), Scheduling, Visit Maintenance, Reports, Security, and Online Manual. The main content area is titled 'Employees' and shows a table of employee records. A 'New Employee' modal form is open in the center, with red boxes highlighting the required fields: Last Name*, First Name*, Position*, and Phone*. The form includes input fields for these fields, a supervisor toggle, a dropdown for Position, and input fields for SSN Last 5 Digits and National Provider ID. At the bottom of the modal are 'CANCEL' and 'CREATE EMPLOYEE' buttons. The background table lists employee names, status (Active), IDs, roles, and dates.

NAME	STATUS	ID	ROLE	DATE
Adams, Morga	Active	887444	CGV - Caregiver	11/14/2023
Adams, Summ	Active	840075	CGV - Caregiver	12/11/2023
ADDISON, ADD	Active			
ARIELLE, ARIEL	Active			
ARTHURIAN, A	Active			
Bailey, Bobbie	Active			
BARBARIAN, B	Active			
Barber, Donni	Active			
Bart, Kyle	Active			
Bennet, Dana	Active			
Bergeron, Bar	Active			
Bergeron, Vict	Active			
Blue, Katie	Active			
Booster, Betty	Active			

For Provider Agency Staff: Feature Overview – Continued

Scheduling (Optional)

Scheduling is available as an option. This helps inform your employee of upcoming visits and allows for alerting.

The screenshot displays the Sandata Home Care web application interface for creating a schedule. The left sidebar contains navigation modules: Dashboard, Clients, Employees, Scheduling (selected), Schedules, Schedule Requests, Visit Maintenance, Reports, Security, and Online Manual. The main content area is titled 'Scheduling / Schedules / Create Schedule' and includes a 'LOG OUT' button. The form is divided into several sections: 'Create Schedule' with a 'BACK' link and a required field for 'Client | Program*'; 'Client Service Information' with dropdowns for 'Service*' and 'Authorization Bill Unit Type*', and input fields for 'Medicaid ID' and 'Authorization Number'; 'Authorizations' showing 'No authorizations found'; and 'Select Employee' with an input field for the employee's name. A 'Preview' section on the right shows a calendar icon and the text 'Schedule Preview' and 'Check and confirm the creation of your schedule here..'. The top right corner shows the user's account information and a 'LOG OUT' button.

For Provider Agency Staff: Feature Overview – Continued

Visit Maintenance

Industry leading tools to provide oversight and manage visits and exceptions.

Export visit maintenance data to Excel with a single action.

Visit Maintenance / Manage Visits

Account [LOG OUT](#)

[CREATE CALL](#) [FILTERS](#) [SHOW DISPLAY OPTIONS](#) [EXPORT DATA](#)

Show Legend [APPROVE ALL](#) [DISAPPROVE ALL](#)

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS
Baker, Anthony	Webster, Lisa	Homemaker Service	06/14/2024	03:00 PM	04:00 PM	01:00	●	●	
Acosta, Cody		Physical Therapy	05/22/2024	12:00 AM	02:00 PM	14:00	●	●	
									Total: 00:00

25 of 2 entries

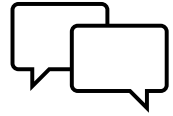
For Provider Agency Staff: Feature Overview – Continued

Reporting

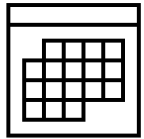
Over 50 available reports with a variety of filters to allow you to report on all EVV data including exports to CSV and Excel.

The screenshot displays the Sandata Home Care Reports interface. On the left is a dark blue navigation sidebar with the Sandata Home Care logo and menu items: Navigate Modules, Dashboard, Clients, Employees, Scheduling, Visit Maintenance, Reports (highlighted), Security, and Online Manual. The main content area is titled 'Reports' and lists various report categories: Alerts Reports, Authorizations, and Daily Reports. Under 'Daily Reports', several report titles are listed, with 'Active Employees' highlighted in blue. A 'Filters' modal is open on the right, containing input fields for 'From Date' (06/17/2024), 'To Date' (06/17/2024), 'From Time' (12:00 AM), and 'To Time' (11:59 PM). It also includes a 'Department' dropdown menu set to 'Select Department' and an 'Employee' text input field. At the bottom of the modal are three buttons: 'CLEAR', 'RUN REPORT', and 'SCHEDULE REPORT'.

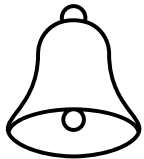
Massachusetts Custom EVV Optional Features



- ▶ Chat with your employee in the field



- ▶ Employees can request a visit to be rescheduled from the app



- ▶ Employees will get a reminder if they haven't checked out from a visit



- ▶ Advanced scheduling capabilities including...
 - Recurring schedules
 - Employee availability checking
 - Validate schedules against available authorizations



Providers Choosing to Use a 3rd Party Alternate EVV System





Alternate EVV (Alt EVV) at a High Level

What is Alt EVV?

- ▶ Agencies can use any EVV vendor system
- ▶ The vendor will submit your data to the Sandata Aggregator
- ▶ Agencies may see their data in the Aggregator
- ▶ Qualified state users and payers may see the data that applies to them

The Vendor Certification Process

- ▶ Vendor certification begins with a single provider agency designating that vendor in the Provider Self-Registration Portal as their Alt EVV vendor
- ▶ The vendor then registers in the Vendor Registration Portal to start the certification process
- ▶ The vendor completes testing to be certified to send data compliant with the EOHHS specifications



How it works...

Capturing your Visits

- ▶ Use the capabilities provided by your vendor to capture visits electronically
- ▶ Updates and changes to your visits are made in the vendor's system
 - ▶ Ensure all required elements are present including...
 - ▶ Cures Required Elements; and
 - ▶ Massachusetts Required Elements
 - ▶ Add missing calls and visits
 - ▶ Changes to visits must be fully logged

Send Visits to the Sandata Aggregator

- ▶ Your vendor's system will transmit all visit information on at least a daily basis using the standard specifications
- ▶ Sandata will apply rules to the data received including...
 - ▶ Does the member exist in the supplied Massachusetts data
 - ▶ Does the transmission meet all the established rules; and then
 - ▶ Sandata's Aggregator will apply all 'business rules' also known as exceptions



And Then....

Reviewing your Data

- ▶ Providers using an Alt EVV system will have access to the Sandata Aggregator
- ▶ The Sandata Aggregator will display all visit information received that made it past the validation rules
- ▶ You can review the status of your visit and any applied exception

Why can't I see my Visit?

- ▶ For some reason, the Sandata Aggregator couldn't accept your data
- ▶ Your vendor should have a log to provide additional information
- ▶ Possible Causes:
 - ▶ Data incorrectly formatted or not sent in per the specifications
 - ▶ A MassHealth or EOE member isn't in the Massachusetts transmission

What if I have Exceptions?

- ▶ Visit data can not be edited directly in the Sandata Aggregator
- ▶ Providers will need to go back to the Alt EVV system, make the appropriate corrections and resend the visit with information about who made the change, when the change happened and why the change was made

What is the Sandata Aggregator?

Visit Review

All data provided by your vendor is visible, just like in Visit Maintenance except changes can not be made directly in the Aggregator.

Sandata Aggregator

Visit Review

AGENCY: AA DE UAT - 190035

CLIENT: Enter Client

MEDICAID ID #: Enter Medicaid ID #

EMPLOYEE: Enter Employee

EMPLOYEE SSN 000-00-0000: Enter Employee SSN

DATE RANGE * MM/DD/YYYY: 06/18/2023 to 06/17/2024

VISIT STATUS: All

FILTER VISITS BY: All Exceptions

SEARCH CLEAR EXPORT

ROWS PER PAGE: 10

Showing 1 to 10 of 155 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
(303)555-1212	Illiams, Brett	●	06/11/2024	●	02:40 PM			02:40 PM			Incomplete	<input type="checkbox"/>	
Smith, Jane	Illiams, Brett	●	06/11/2024	02:40 PM	03:13 PM	00:33	02:40 PM	03:13 PM		00:33	Incomplete	<input type="checkbox"/>	
(303)555-1212	●	●	06/11/2024	08:17 AM	●		08:17 AM				Incomplete	<input type="checkbox"/>	

What is the Sandata Aggregator? – Continued

Reporting

Over 50 available reports with a variety of filters to allow you to report on all EVV data including exports to CSV and Excel.

The screenshot shows the Sandata Aggregator Reporting interface. On the left is a blue sidebar with the Sandata Aggregator logo and a menu containing: 'Navigate Modules', 'Visit Review', 'Reports' (highlighted with a bar chart icon), 'Authorizations', 'Security' (with a dropdown arrow), and 'Online Manual'. The main content area is titled 'Reports' and contains the following sections:

- Select Report:** A search bar and a dropdown menu for 'CORPORATION' with the selected value 'DE UAT Testing 7 - 190035'.
- REPORT TYPE:** A dropdown menu with the selected value 'Daily Reports'.
- Select Timeframe:** A section with a note '* indicates required field'. It includes:
 - FROM DATE * MM/DD/YYYY:** A date input field containing '06/17/2024' with a calendar icon on the right.
 - FROM TIME * HH:MM AM/PM:** A time input field containing '12:00 AM' with a clock icon on the right.

Provider Self-Registration Portal Overview



Provider Self-Registration Portal Overview


Who needs to register?

- All Providers that provide personal care services and home health services

Where does a provider register?

- Use the Sandata EVV Provider Self-Registration Portal
- Provider identification number with service location (PIDSL) is the unique provider identifier that you will need for registration
- The Provider Self-Registration Portal is expected to open in late August

Provider Self-Registration Portal Landing Page



Get more right from the start


Welcome to the Sandata EVV Self-Registration Portal!

What would you like to do?

Register as a Provider

Register as an Alternate EVV Vendor

Login



Get more right from the start

EVV Provider Self-Registration

Please select the EVV program in which you would like to register:

SELECT EVV PROGRAM *

Massachusetts EOHHS

Please enter your unique provider identifier for the EVV program:

ENTER PROVIDER MEDICAID ID *

Enter Provider Medicaid ID

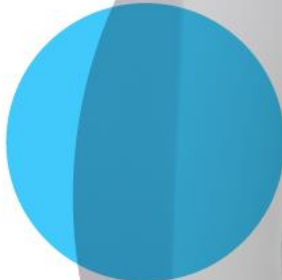
Register



Why do providers need to register?

- ▶ Ensures providers who are required to use EVV when providing services for EOHHS members have accounts, which results in more accurate program reporting
- ▶ Captures up-to-date contact information for providers
- ▶ Creates one place for providers to both register for the EVV program and indicate if they are using an Alt EVV vendor
- ▶ Guides the provider through the EVV onboarding process, one step at a time
- ▶ The provider self-registration portal will open in August

What EVV Training is Available



What Training is available?

1. Online Course for Agency Administrators (2 hours)

2. Online Courses for Agency Admins and Staff (Self-Paced)

3. Virtual Instructor-Led Training Sessions

4. Post-Launch Virtual Instructor-Led Training Sessions

5. Access to Video Library and Guides in Sandata On-Demand

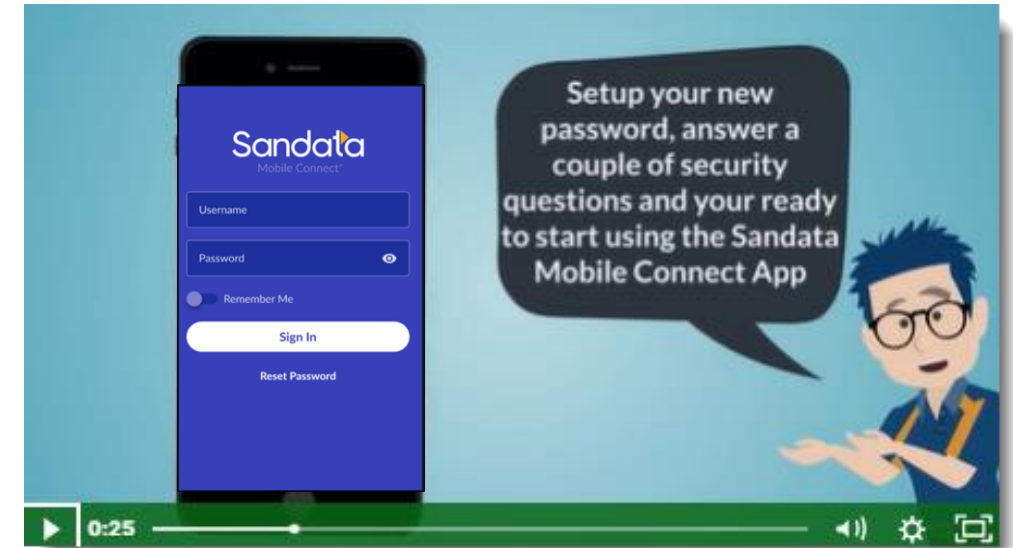
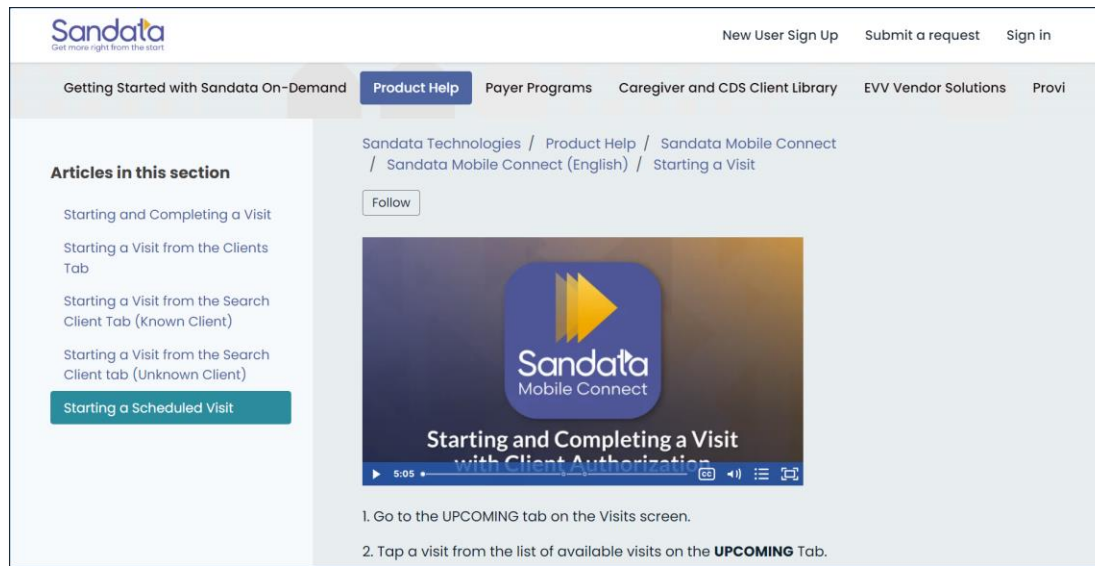
6. Surveys/Evaluation



What is Sandata On-Demand?

Self-serve access to state-specific resources

- Guides and Instructional Videos
- Customer Support
 - <https://sandata.zendesk.com/hc/en-us>

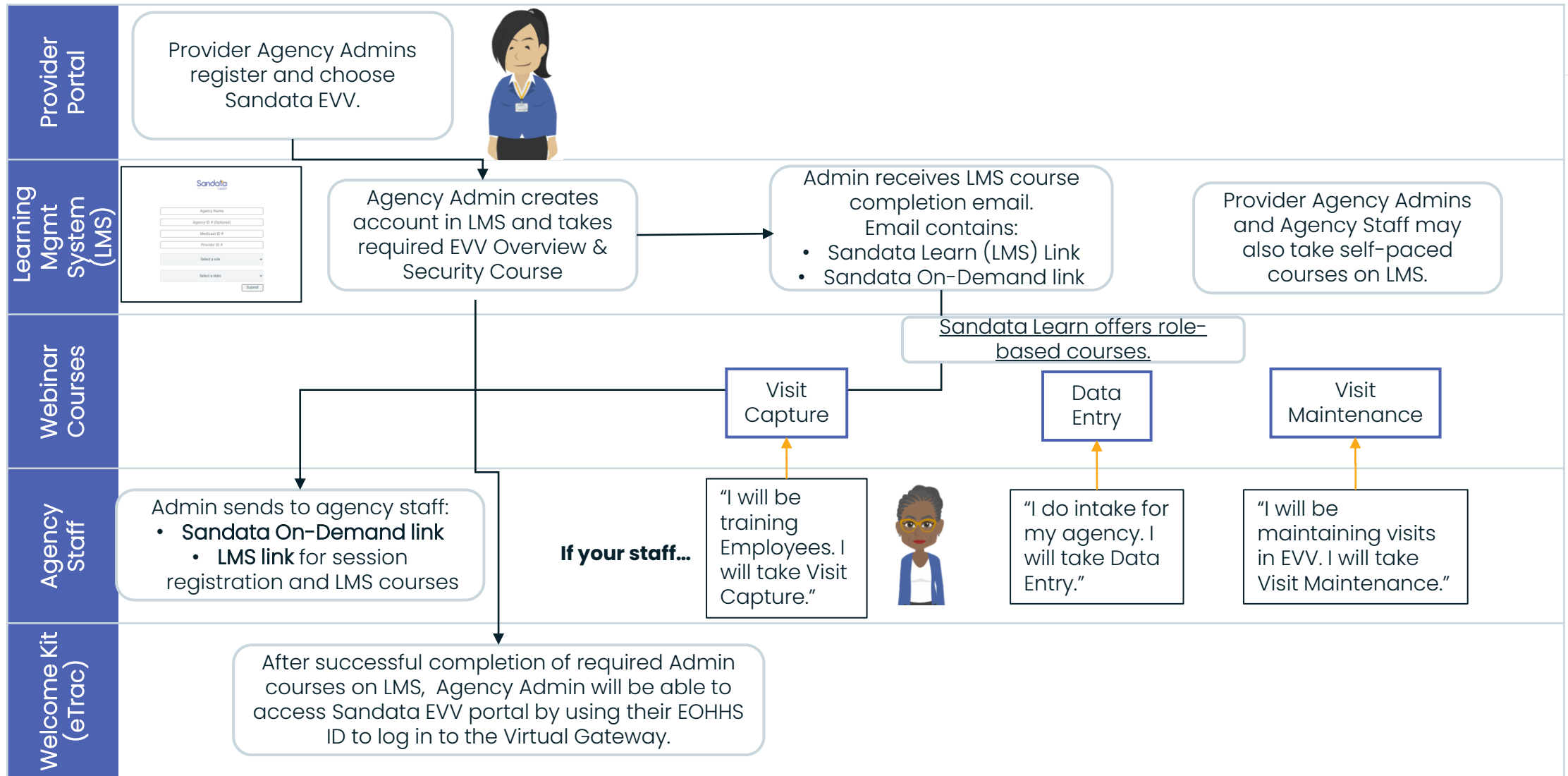


Employee Library

- Videos and guides
- Visit Capture: Mobile App
- No login required



Provider Training Roadmap



What Alternate EVV Training is Available



What Aggregator Training is available?

1. Online Course for Agency users

2. Virtual Instructor-Led Training for State Entity Users

3. Access to Video Library and Guides in Sandata On-Demand



Next Steps



3 More Town Halls Are Tentatively Scheduled

Sandata will be hosting 3 more Town Halls tailored for providers, Alternate EVV vendors, health plans, and other stakeholders. Each event will cover some content from previous events and more.

Next Town Hall
August 20th at 2 pm ET

- Provider Registration process
- Training Opportunities
- Review of technical specification for Alt EVV vendors

Subsequent Town Hall
September 10th at 2 pm ET

- Vendor Self-Registration Portal process
- Another review of the Alt EVV technical specifications and vendor testing

Final Town Hall
December 10th at 2 pm ET

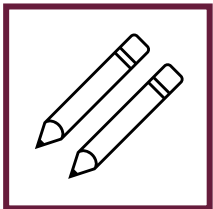
- Go Live details
- Customer Support

Next Steps for EVV Engagement



ENGAGE:

- Look for upcoming EVV communications from EOHHS, Sandata, and your contracting entity



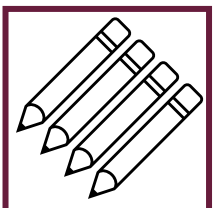
LEARN:

- Stay updated on the EVV implementation on the Mass.gov EVV website, which can be accessed here: <https://www.mass.gov/topics/electronic-visit-verification-evv>



ATTEND:

- Learn more about the State EVV Solution and processes to utilize an Alternate EVV system, by attending Sandata-led Town Halls
- Look for an invitation from your contracting entity

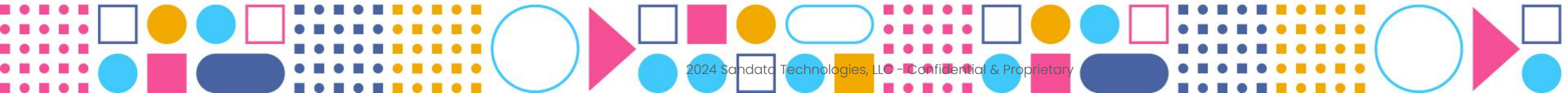


REACH OUT:

- Ask any questions by reaching out to the EVV mailbox: EVVfeedback@Mass.gov



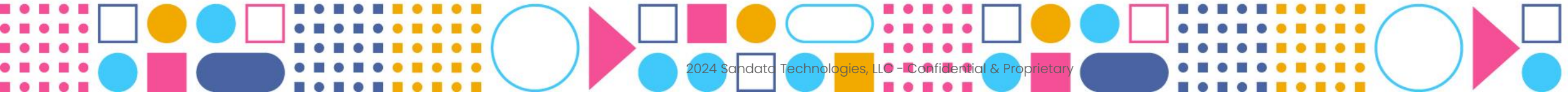
Thank you for attending today's event
and for taking time to complete the
post event survey!



Appendix



Sandata Terminology



Sandata Terminology

Sandata EVV Term	Business Definition / Use	Other Names/Terms
<p>Aggregator</p>	<p>The view-only portal and underlying Sandata EVV repository for reporting and visit review of collected electronic visits transmitted by state providers.</p>	<p>Audit View Portal</p>
<p>Authorization</p>	<p>Documentation for a provider to allow them to supply a specific amount of a documented service(s) to a member over a defined period. Generally, authorization of service is needed for a provider to be able to bill for that service.</p>	<p>Prior Authorization PAR (Prior Authorization Request)</p>
<p>Claim</p>	<p>A submission by a provider to receive payment for service(s) that they have provided on behalf of a payer for a program. Often, an 837 is generated for service(s) provided to a member. These are submitted to a payer for adjudication and reimbursement.</p>	<p>837 (both 837I and 837P) Encounter Bill</p>
<p>Member</p>	<p>The recipient of care from an employee.</p>	<p>Member Recipient of care Beneficiary Individual Consumer</p>



Sandata Terminology

Sandata EVV Term	Business Definition / Use	Other names/terms
Employee	The individual who is directly in contact with the members and is providing the service(s) to that member at the point of care.	Caregiver Direct Care Provider
EVV Vendor	EVV collection through an EVV Solution that is not part of the Sandata State provided EVV Solution.	Alternate EVV Vendor Alt EVV Vendor 3rd Party Vendor
Payer	An entity that generates authorization for care and accepts bills (837s) or encounter information to adjudicate and pay for service(s) and activities performed.	State MMIS entity MCO's EOEA ASAP
Program	A waiver or other state-level initiative that defines a set of services whose costs will be covered by the state or federal programs. Programs often define specific requirements for individual eligibility, services covered, reporting or auditing requirements. It can also include rules for delivery of service, limiting or administering it, and how those activities are submitted for payment.	Waivers Medicaid Programs State Programs

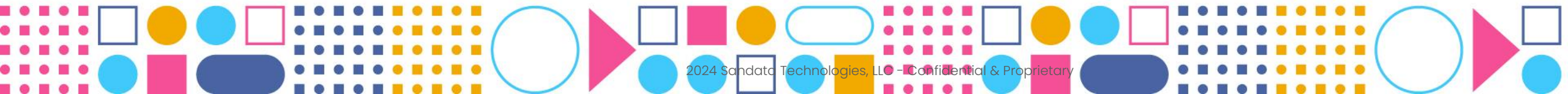


Sandata Terminology

Sandata EVV Term	Business Definition / Use	Other names/terms
<p>Provider</p>	<p>A business entity that manages and coordinates the delivery of services and care to members. Providers are contracted directly or through an intermediary to provide service(s) under the Medicaid program. A provider will have one or more employees. A provider receives authorization (tacit or explicit) to provide service(s) to specific members and will submit invoices for payment once care has been provided.</p>	<p>Agencies Provider Agency Provider of Choice</p>
<p>Service</p>	<p>An activity that is performed by an employee to/for a member, that is tracked via EVV and likely submitted to a payer via a claim for adjudication and payment. Often this is defined by an industry standard HCPCS code (and possibly modifiers) or occasionally by revenue codes.</p>	<p>HCPCS codes</p>
<p>Visit</p>	<p>Record of the proposed and/or actual encounter. A visit can include a schedule, which is optional, and be associated to an authorization. A visit is evaluated to determine if it meets all 21st Century Cures requirements (the 6 required elements) and if it meets program-specific rules.</p>	<p>Claim</p>



Sandata EVV Sample Screen Shots



EVV Dashboard

Dashboard

Visit Counts By Exceptions Visit Counts By Status

Date Range: Today

Visit Exceptions

Unknown Clients	0
Unknown Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Unmatched Client ID / Phone	0
Missing Service	0
Unauthorized Service	0

Visit Exception Count Per Day

05/23



Clients

- If Sandata receives an authorization, the member will be loaded for the agency
- If Sandata doesn't receive an authorization for a member, the member is manually added

Clients Account: 91031 [US/Central] - Santrax [LOG OUT](#)

[CREATE CLIENT](#) [FILTERS](#) [EXPORT DATA](#)

CLIENT	STATUS	PROGRAM	SUPERVISOR	MEDICAID ID	CLIENT PAYER ID	AS OF	SOC	EOC	SERVICES
SMITH JR, BILLY M.	Pending	ABI-MFP		1404688013		11/18/20			T1019
SMITH, CINDY	Active	ABI-MFP		3535889459	3535889459	7/1/23	7/1/23		99504

25 of 2 entries

Filters ✕

Last Name

First Name

Status

Client ID

Client Payer ID

Medicaid ID

Program

Language

Primary Payer

[CLEAR](#) [APPLY FILTERS](#)



Employees

Employees Account: 91031 [US/Central] - Santrax [LOG OUT](#)

[FILTERS](#) [EXPORT DATA](#)

NAME	STATUS	EMPLOYEE ID	POSITION	HIRED DATE	RELEASED DATE	UPDATE AS OF
Caregiver, Amber	● Active	293890	CGV - Caregiver	05/09/2024		05/09/2024
Caregiver, Chris	● Active	251948	CGV - Caregiver	05/09/2024		05/09/2024
Caregiver, Jeffrey	● Active	472239	CGV - Caregiver	05/09/2024		05/09/2024
Caregiver, Martha	● Active	982436	CGV - Caregiver	05/09/2024		05/09/2024
Caregiver, Sheila	● Active	745235	CGV - Caregiver	06/29/2022		06/29/2022

25 of 5 entries « < 1 > »

Filters

Last Name

First Name

Status

Employee ID

Supervisor

Position

Language

Office Worker

Caregiver

[CLEAR](#) [APPLY FILTERS](#)



Scheduling - Optional

- This tool can be a powerful aid to assist in managing your business

Scheduling / Schedules / Create Schedule Account: 91

[BACK](#)

Create Schedule

* Required

Client | Program* Medicaid ID

Client Service Information

Service* Authorization

Authorization Bill Unit Type* Event Code*

Authorizations

No authorizations found

Select Employee

Filter: Match Client Attributes

Employee

Schedule Event(s)

Event Status*

Event Date* Start Time* End Time*

Preview

Sched
Check and confirm the

Repeat Event

Repeat every

Repeat On

Mo Tu We Th Fr Sa Su

Ends

On

After event(s)

[CANCEL](#) [DONE](#)



View Visit Information and Make Corrections

Visit Maintenance / Manage Visits Account: 91031 - Santrax [LOG OUT](#)

[CREATE VISIT](#) [CREATE CALL](#) [FILTERS](#) [SHOW DISPLAY OPTIONS](#) [EXPORT DATA](#)

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	APPROVED	ACTIONS
Adams, John	Caregiver, Chris	Supportive Home Care/Day	05/23/2024	08:00 AM	09:00 AM	01:00	08:00 AM	09:00 AM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
						Total:			01:00				

25 of 1 entries « < 1 > »

Visit Maintenance / Visit Details Santrax [LOG OUT](#)

[BACK](#) Visit From Date: 05/23/2024

Client ID#: 913365 | Client Name: Adams, John | Medicaid ID#: 0007041776 | Employee ID#: 251948 | Employee Name: Caregiver, Chris

[General](#) [Client](#) [Employee](#) [Call Log](#) [Tasks](#) [Exceptions](#) [GPS](#) [Memo](#) [Claims](#) [History](#)

Visit From Date

Visit To Date

Visit Time Zone

Visit Status

Call In

Call Out

Call Hours

Adjusted In Date

Adjusted In

Adjusted Out Date

Adjusted Out

Agency ID

Agency Name

Payer

Program

Service

Group Visit Code

Client Verified Time

Client Verified Service

Client Signature

Offline Visit

Visit Source



Reporting

Reports Santrax [LOG OUT](#)

[FILTERS](#) [COLLAPSE](#)

- Authorizations** ▼
- Billing** ▼
- Daily Reports** ▲
 - Active Clients
 - Active Employees
 - Call Listing
 - Call Summary
 - GPS Distance Exception
 - Visit Listing
 - Visit Verification
- Date Range Reports** ▲
 - Client Visit Summary
 - Detail Visit Status
 - Employee Visit Log
 - Summary Visit Status
 - Time Sheet
 - Visit Log

Aggregator – Visit Review

Sandata Aggregator Account: JVAdmin1488@sandata.com [LOG OUT](#)

Visit Review

* Indicates required field

AGENCY: CT CDS DDS Accou... CLIENT: Enter Client MEDICAID ID #: Enter Medicaid ID # EMPLOYEE: Enter Employee

DATE RANGE * MM/DD/YYYY: 05/31/2021 to 05/23/2022 VISIT STATUS: All FILTER VISITS BY: All Exceptions

[Q SEARCH](#) [CLEAR](#)

[EXPORT](#)

ROWS PER PAGE: 50 | [Show Display Options](#)

Showing 1 to 50 of 56 entries

Sort by Client Name

Client Name	Employee Name	Service	Visit Date	Scheduled Time In	Scheduled Time Out	Scheduled Hrs	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Doe, Shane	Doe, Tywanda		05/17/2022				11:14 AM	11:46 AM	00:32	11:14 AM	11:46 AM
(610)633-7062	Michael, Frosty		05/06/2022				05:49 PM			05:49 PM	
(206)670-8418			04/19/2022				02:53 PM			02:53 PM	
client, carla	Doe, Ty	Daily Respite	03/24/2022				01:00 AM			01:00 AM	03:00 AM

Visit Details Visit Start Date: 03/24/2022

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
client, carla	776655	098765432109	Doe, Ty	

GENERAL

SCHEDULED START TIME	SCHEDULED END TIME
None	None

CLIENT

FROM DATE	TO DATE	VISIT TIME ZONE	VISIT STATUS
03/24/2022	None	US/Eastern	Incomplete

EMPLOYEE

AUTHORIZATIONS

CALL IN	CALL OUT	CALL HOURS	UNITS
01:00 AM	None	None	0

CALL LOG

TASKS

ADJUSTED IN DATE	ADJUSTED OUT DATE
03/24/2022	03/24/2022

EXCEPTIONS

GPS

ADJUSTED IN TIME	ADJUSTED OUT TIME	BILL HOURS
01:00 AM	03:00 AM	02:00

MEMO

Visit Details Visit Start Date: 03/24/2022

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
client, carla	776655	098765432109	Doe, Ty	

GENERAL

CLIENT

EMPLOYEE

AUTHORIZATIONS

CALL LOG

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

Map Satellite

Client location: No GPS Exception



Aggregator – Reporting

Sandata
Aggregator

Account: JVAdmin1488@sandata.com [LOG OUT](#)

Reports

Select Report

CORPORATION
PAYR-3644 - 100530

REPORT TYPE: Daily Reports REPORT NAME: Active Clients

Select Timeframe

* indicates required field

FROM DATE * MM/DD/YYYY: 05/23/2024 TO DATE * MM/DD/YYYY: 05/23/2024

FROM TIME * HH:MM AM/PM: 12:00 AM TO TIME * HH:MM AM/PM: 11:59 PM

Select Parameters

ACCOUNT: All selected (1) PROGRAM: All selected (10)

CONTRACT: All selected (3) CLIENT: Enter Client

SUPERVISOR: CLIENT MEDICAID ID:

