



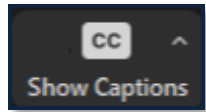
# Sandata EVV Town Hall #3 Massachusetts EOHHS

Tuesday, September 24, 2024





# Meeting Etiquette

- ▶ This session is being recorded and will be available on Sandata On-Demand, our learning portal
  - Portions of this recording may serve as an EVV training resource
  - We will include a link to the EOHHS EVV webpage with this content
- ▶ Enable captions by selecting 'Show Captions' on your toolbar 
- ▶ For questions, please use the 'Q&A' feature at the bottom of your screen
  - Questions will be addressed during today's Q&A session.
  - Questions will also be documented in Q&A documents on the EOHHS EVV webpage and Sandata On-Demand
  - You can also email questions directly to EOHHS at EVVfeedback@Mass.gov
- ▶ Following today's town hall, we will send you a survey to gather your feedback on the presentation. Please take a moment to complete it to help us improve future events and provide you with the information you need



# Agenda

- EOHHS Program Highlights
- Provider & Vendor Portal Recap
- Initial Launch Focus Group
- Provider Training
- Q&A Session
- Next Steps
- Appendix





# EOHHS Program Highlights





# 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 MassHealth. 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
- MassAbility (also known as 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.

The Services Code Listing includes a breakdown by program area of all the HCPCS Codes, Descriptions, and the Modifiers for services that are subject to EVV in Massachusetts.

HCPCS Code	Code Description	Modifiers

**Example  
Only**

Please see the [Massachusetts EVV website](#) for the approved list of all service codes.





# Open Model Solution

The EOHHS EVV Solution is an Open Model which means that providers can use their own approved 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 these providers utilizing an EVV system other than the State provided systems as an “Alt EVV” provider.

**State-Provided  
System**

**OR**

**Alt EVV**

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

**Individual Receiving  
Service**

**Individual Providing  
the Service**

**Type of Service  
Being Provided**

**Location of the  
Service**

**Date of the Service  
Delivery**

**Beginning and End  
Time of Service  
Delivery**



# EVV Implementation Timeline Updates



## Testing and Training

- EOHHS is working with Sandata on development, testing, and training customizations to validate the product against the MassHealth business rules.
- Instructor Led Training is scheduled to begin on September 25, 2024.



## Onboarding

- Provider agencies are expected to begin onboarding processes with Sandata and are encouraged to begin onboarding now to ensure they have ample time to setup their data in the Sandata system or make changes to their Alt EVV system.
- Onboarding began in August 2024.



## Program Initial Go-Live

- Initial Go Live period will be approximately 3 months beginning at on September 30, 2024.
- Initial Go Live participants will be fully live in the Sandata EVV System or aligned with an Alt EVV vendor and will be open to all programs, provider types that are part of the EOHHS EVV Implementation.



## Program Required Registration

- EOHHS expects all users to be onboarded and using Sandata or an approved Alt EVV system by a date that will be set by EOHHS.





# EVV Implementation Key Dates

Key Activities	Scheduled Date*	Status
EVV Overview Forum Session #1	Thursday, May 30, 2024	Completed
EVV Overview Forum Session #2	Thursday, June 6, 2024	Completed
Town Hall #1 – Sandata Intro & EVV Overview	Tuesday, June 25, 2024	Completed
Town Hall #2 – Provider Registration, Alt EVV Specs & Vendor Registration & Testing	Tuesday, August 20, 2024	Completed
Vendor Portal Opens for Registration & Alt EVV Vendor Testing	Wednesday, August 21, 2024	Completed
Town Hall #3 – Program Review, Provider & Vendor Portals, Launch updates & Provider Onboarding	Tuesday, September 24, 2024	In Progress
EVV Program Go Live	September 30, 2024	Upcoming
Town Hall #4 – Program Launch, Customer Support, Ready Set Go	December 3, 2024	Upcoming
EVV Program Required Registration	December 2024	Upcoming

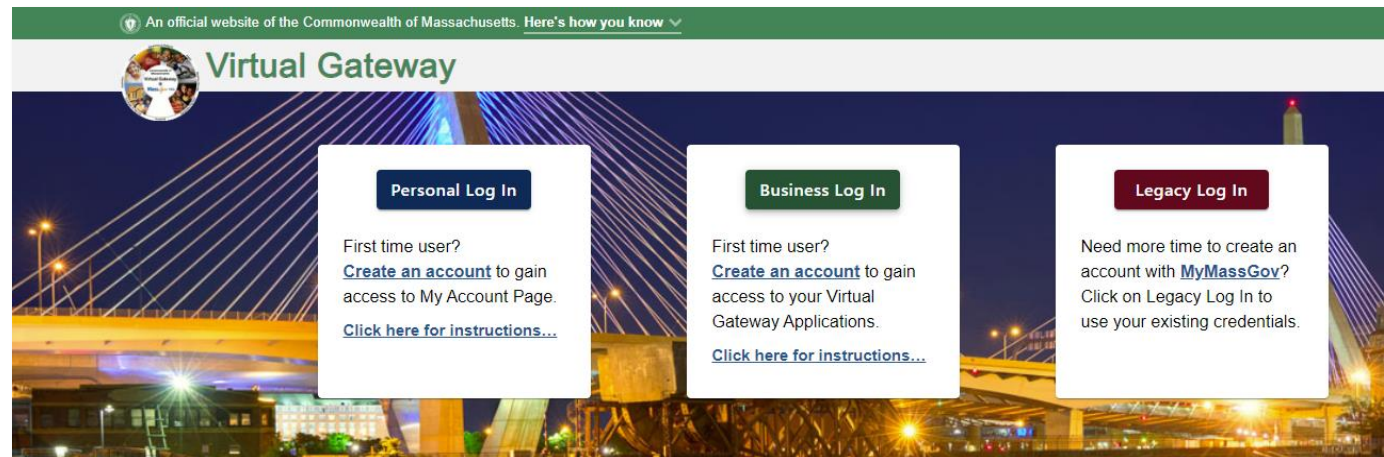
\*Note these scheduled dates are subject to change.



# EVV Access Requirements

Provider agency administrators will need to complete these steps to be able to access Sandata EVV and Aggregator from the MassHealth Virtual Gateway.

- ▶ [Fill out User Request Form \(URF\)](#)
- ▶ Complete steps in email from Virtual Gateway
- ▶ Register in Provider Portal with same email address used on URF
- ▶ After launch, use the Virtual Gateway page to log into Sandata EVV or Aggregator





# User Request Form (URF)

Provider agency administrators will need to complete these steps to be able to access Sandata EVV or Aggregator from the MassHealth Virtual Gateway.

- ▶ Each person using Sandata EVV or Aggregator must have their own Massachusetts Health ID
- ▶ Each person's email addresses on the URF needs to match the email addresses in Sandata EVV
- ▶ Provider Agency Administrators must submit the URF for all office staff who need access
- ▶ Submit the URF to the email in the form
- ▶ Final setup steps will be emailed you to once the request is processed

Note: The organization ID and Name will be populated by the State

An official website of the Commonwealth of Massachusetts [Here's how you know](#)

Menu Select Language Contrast Setting

Mass.gov Search Mass.gov

Home > Health & Social Services > Virtual Gateway > Organization Management

OFFERED BY Executive Office of Health and Human Services

## User Request Forms

In order to gain access to the Virtual Gateway, an organization's Access Administrator must complete the appropriate User Request Form (URF) and Rider Form, if required by business service.

### User Request Forms (URFs)

Each URF is specific to the Virtual Gateway service an organization will use so please select the appropriate URF below. Please download a copy to your desktop, complete the form as per the instructions on the form, and email the complete form to the email address indicated on the form.

- **Agency-based Electronic Visit Verification (EVV) System and Data Aggregator User Request Form (URF)**
- Appeals Processing System (APS) User Request Form
- BSAS eLicensing Provider User Request Form
- Children's Behavioral Health Initiative (CBHI) User Request Form
- Cognos User Request Form (State Employee)

# Provider and Vendor Portal Recap



# Provider Self-Registration Portal Overview

## Who needs to register?

- All provider agencies are required to register and select Sandata EVV or Alternate EVV as the EVV application

## Where does a provider agency register?

- Use the Sandata EVV Provider Self-Registration portal
- The Provider Identification Number (PID/SL) serves as the unique identifier for registration

## When can I register?

- The Provider Self-Registration portal is now open. Please begin the registration process after today's town hall if you haven't already done so.

# Why do providers need to register?

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- ▶ Provider agency accounts are created and will be linked to the MassHealth Virtual Gateway for the Single Sign-On (SSO) process
- ▶ Centralizes provider registration for the EVV program
- ▶ Captures up-to-date provider agency administrator contact information for EVV
- ▶ Offers a choice between State-supplied EVV (Sandata) or Alternate EVV vendors
- ▶ Provider agencies will have the ability to change their EVV selection between the State-supplied EVV option and using an Alternate EVV vendor by submitting a ticket with Customer Support
- ▶ Guides the provider agency through the step-by-step onboarding process
- ▶ Ensures required EVV accounts for accurate program reporting



# Provider Self-Registration Support Steps

If providers encounter errors, there are clear messages guiding them to the next steps. For Sandata Support, providers can create a ticket through the [Sandata On-Demand New Ticket Request Form](#).

- **Provider already exists**

- ▶ “It looks like your provider organization has already been registered and cannot be registered again. If you believe you have received this message in error, please contact Sandata Support.”

- ▶ **Something went wrong**

- ▶ “It looks like something went wrong in the registration process. Please reach out to Sandata Support.”

- ▶ **Provider identifier entered not found**

- ▶ “The provider identifier entered is not found. Please make sure that you selected the correct payer program and that the identifier you entered is your PID/SL. The PID/SL is 10 characters, made up of a 9-digit base number and an alpha service location letter (e.g., 123456789A). Please enter either the 9-digit base number or the 10 characters which includes the alpha service location.
- If your identifier is still not found and you believe that you are an EVV-eligible provider and should be able to register, please reach out to your contracting entity (managed Care Organization (MC), Accountable Care Organization (AC), Aging Services Access Points (ASAP), One Care, etc.) or the appropriate contact below for assistance.

MassHealth LTSS Provider Service Center: 1-844-368-5184 or email: [support@masshealthltss.com](mailto:support@masshealthltss.com)

Non-LTSS Provider Line: 1-800-841-2900

HCBS Waiver Provider Network Administration: 1-855-300-7058 or email: [providernetwork@umassmed.edu](mailto:providernetwork@umassmed.edu)

# Vendor EVV Self-Registration Portal Overview

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## Who needs to register?

- Alternate EVV vendors, once a provider commits to using their solution

## Where does a vendor register?

- Utilize the Sandata Vendor Registration Portal

## When can vendors register?

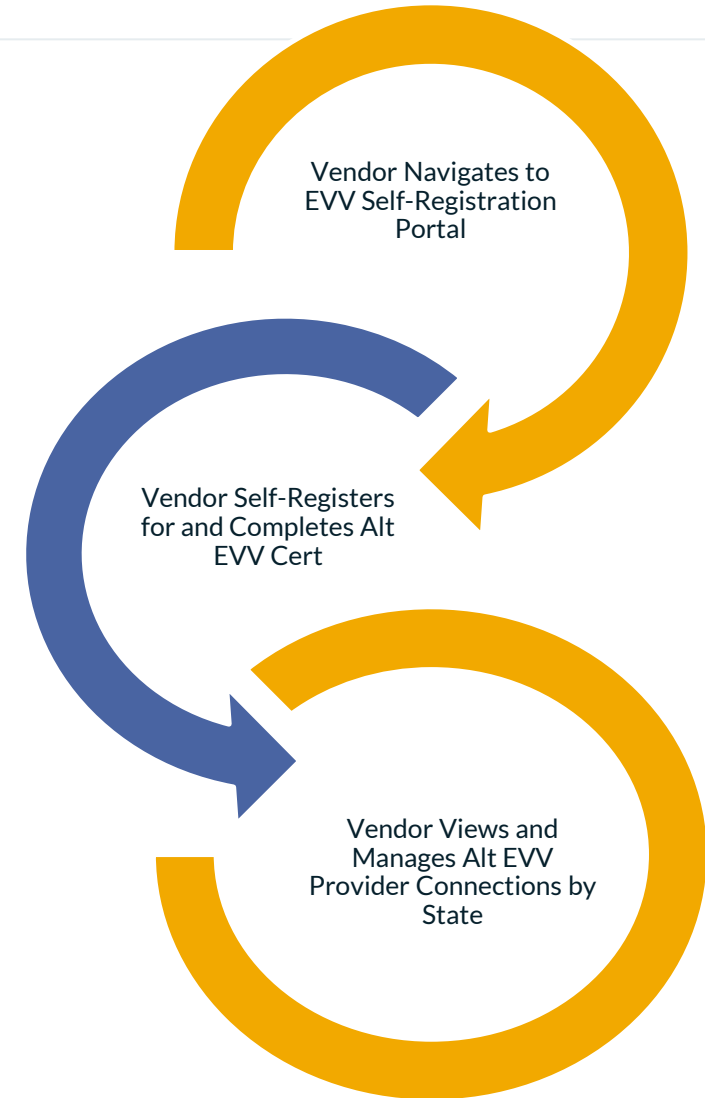
- The Sandata Vendor Registration Portal is opened now for vendors to register and begin testing



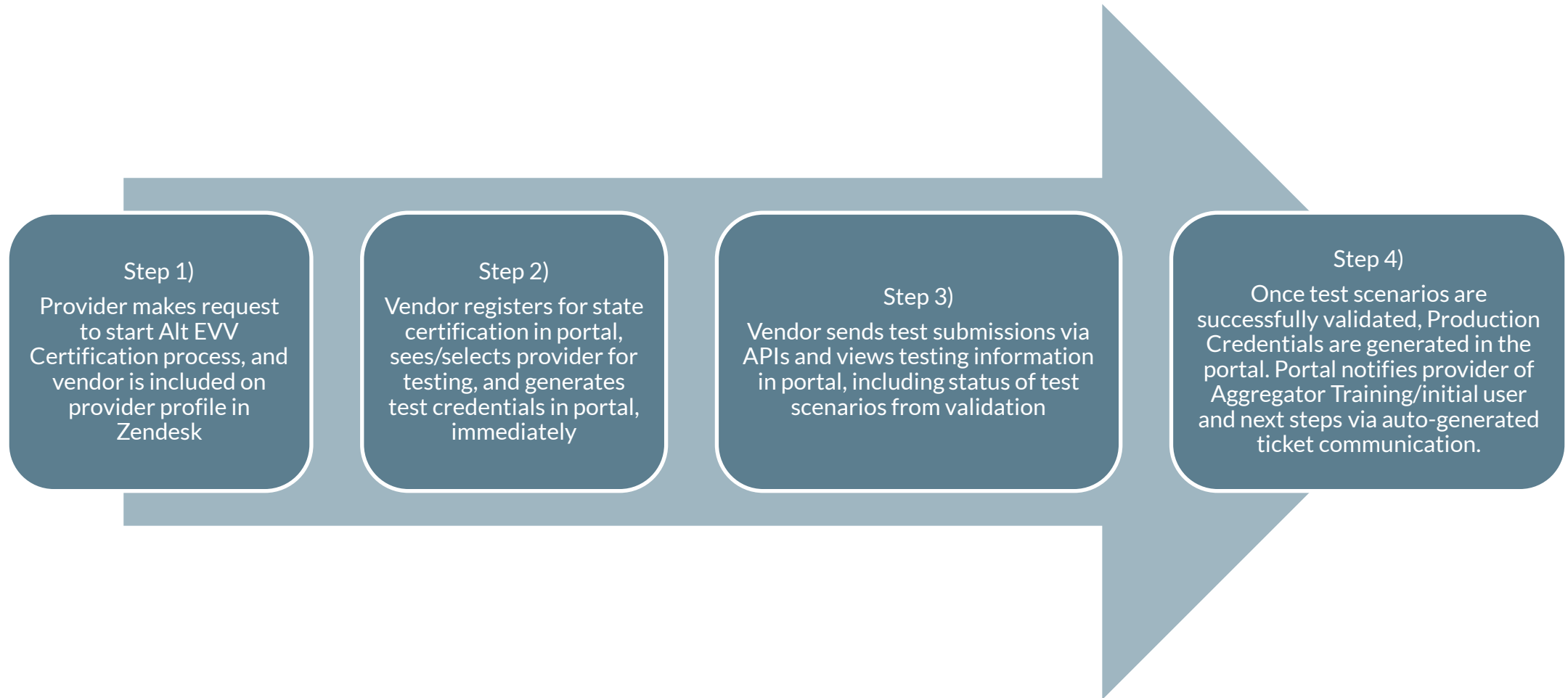


# The Vendor Credentialing Process

- ▶ A streamlined and fast certification process
- ▶ Vendors register to ensure they are recognized by Sandata as an Alternate EVV Organization.
- ▶ Enables eligible vendors to complete the Alternate (Alt) EVV Certification for the Massachusetts state EVV program.
- ▶ Meets Massachusetts State EVV program requirements



# EVV Self-Registration Vendor Process



# Initial Launch Focus Group Program



# Purpose of the Initial Launch Focus Group

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- ▶ This group is established to gather firsthand feedback from provider agency users on the following:
  - **Onboarding Feedback:** Experiences with the User Request Form and Provider Registration processes.
  - **Training Feedback:** Input on LMS and instructor-led training in Sandata Learn and resources in Sandata On-Demand.
  - **Customer Support Feedback:** Experiences with Sandata On-Demand for support tickets and interactions with our team.
  - **SMC User Experience:** What you liked about the app and areas for improvement.
  - **Sandata EVV Experience:** Feedback on setup, scheduling, visit maintenance, and other features.
  - **Sandata Aggregator Experience:** Opinions on reporting capabilities and suggestions for improvement.



# Focus Group Expectations

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- ▶ Initial Launch period: **September 30 – December 6, 2024**
- ▶ Focus group participants must fully engage with the Provider Agency EVV solution
- ▶ Focus group feedback will drive technical enhancements, training effectiveness, and clear communication for the full program launch

## **Sandata EVV Agency Providers:**

- ✓ Provider agency registered
- ✓ User Request Form completed
- ✓ Training completed
- ✓ Employees using Sandata Mobile Connect (SMC) for check-in/check-out and CMS-required data
- ✓ Administrator performing visit maintenance via Sandata Portal
- ✓ Increasing percentage of verified visits

## **Alternate EVV Providers:**

- ✓ Provider agency registered
- ✓ User Request Form completed
- ✓ Training completed
- ✓ Employees using their system for check-in/check-out and CMS-required data
- ✓ Visit data sent in Sandata format to EVV Data Aggregator via alternate EVV vendor
- ✓ Increasing percentage of verified visits

# Communication Plan and Timeline

- ▶ These tasks outline communication activities to capture feedback and ensure a successful initial launch

Communication Tasks	Target Date
Hosted the initial Focus Group check-in and review the Ready, Set, Go checklist.	9/18/2024
Hosting a bi-monthly check-ins to track activity. <ul style="list-style-type: none"><li>• 1<sup>st</sup> Meeting scheduled for Wed, 10/16</li></ul>	10/14/2024 to 11/25/2024
Distribute survey to capture user experience.	
Distribute Outlook Poll for additional feedback.	
Send targeted emails requesting feedback on specific functions or features.	



# Training Opportunities

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- ▶ Focus group members are encouraged to attend upcoming training and town halls.

## What Training is available?

- Self-paced courses available in Sandata Learn.
- Register for and attend Instructor-Led training sessions in Sandata Learn.
- Participate in Town Halls for EVV implementation updates, Q&A, and process changes.
- Attend additional training sessions offered during the launch period, if additional support is needed.



# Provider Agency & Alternate EVV Training





# What provider agency training is available?

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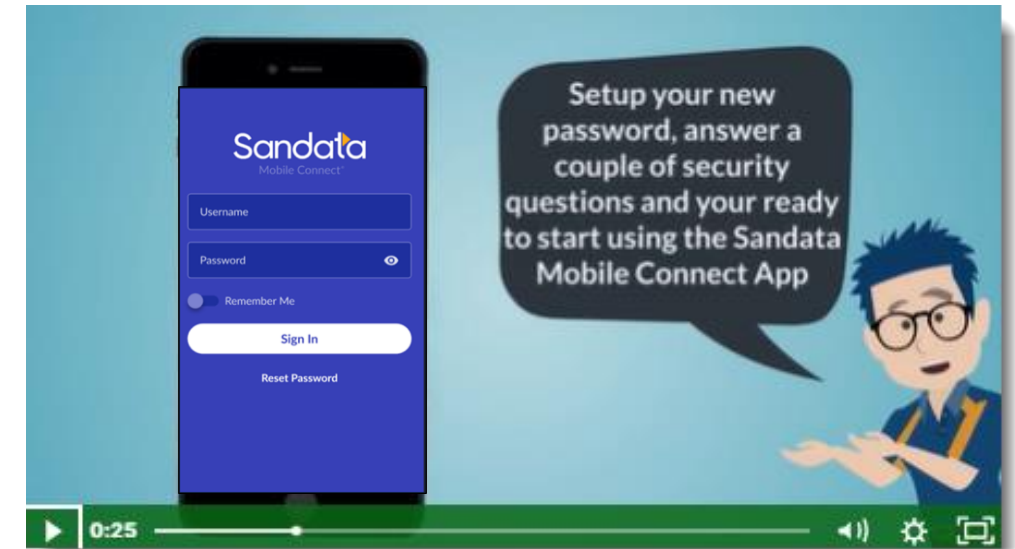
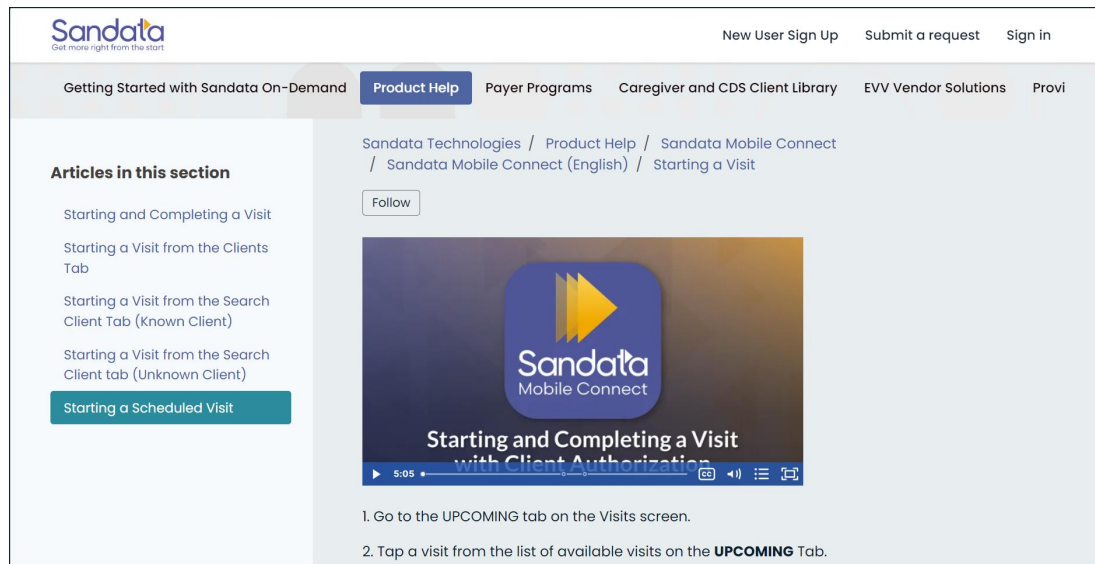
1. Online Course for Provider Agency Administrators (2 hours)
2. Online Courses for Provider Agency Admins and Staff (Self-Paced)
3. Virtual Instructor-Led Training Sessions
4. Post-Launch Virtual Instructor-Led Training Sessions
5. Access to Video Library and Guides in Sandata On-Demand



# Sandata On-Demand

## Self-serve access to state-specific resources

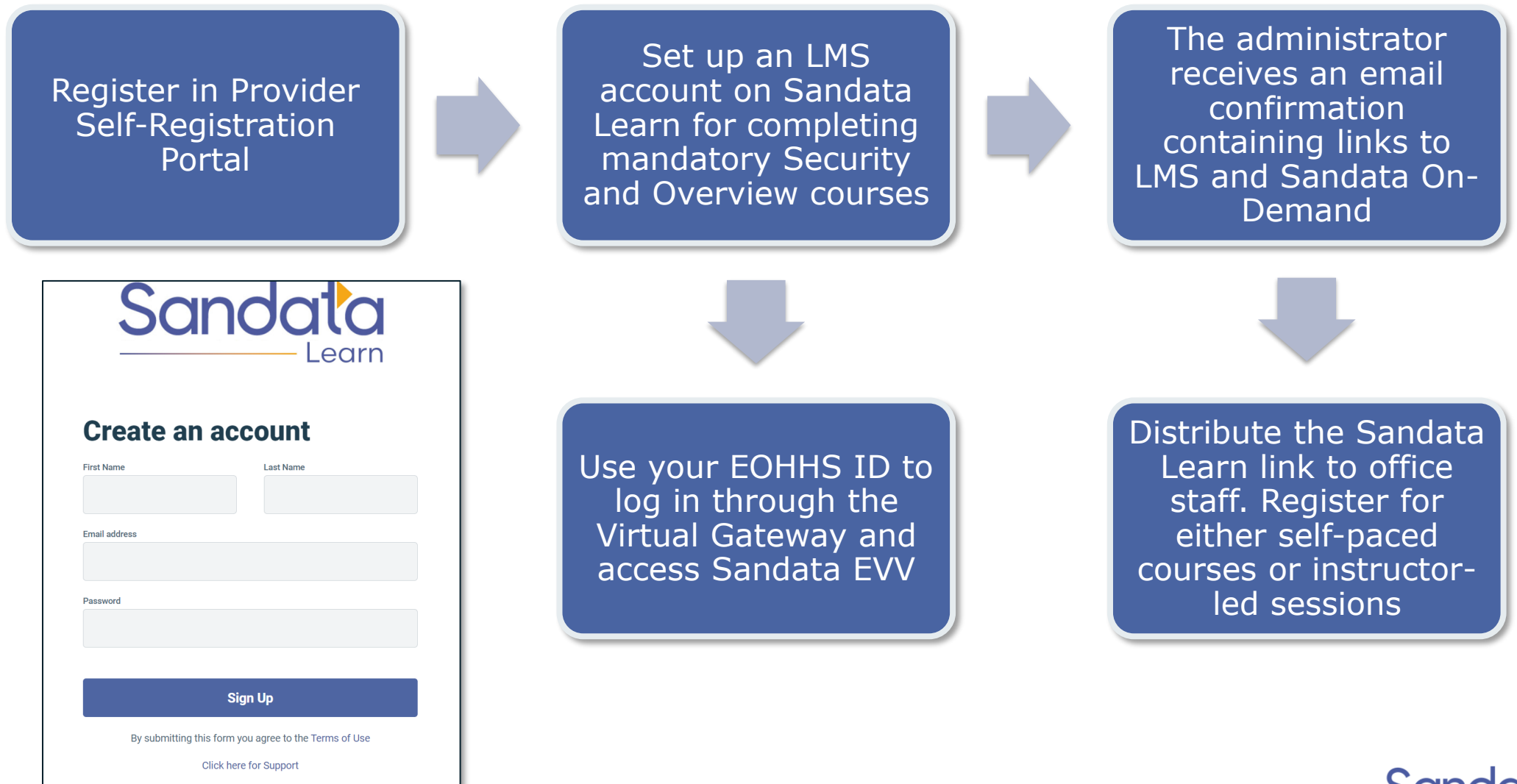
- Guides and Instructional Videos
- Customer Support
  - <https://sandata.zendesk.com/hc/en-us>



## Caregiver Library for Provider Agency Employees

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

# Provider Agency Administrator Roadmap



# Office Staff Training Roadmap

The screenshot displays the Sandata Fuse training interface. On the left is a 'Table of Contents' sidebar with sections: INTRODUCTION, HOW TO CREATE A SCHEDULE, HOW TO CREATE A SCHEDULE TEMPLATE, and HOW TO EDIT A SCHEDULE. The 'Creating a Schedule: Practice' module is selected and highlighted. The main content area is titled 'Creating a Schedule: Practice' and includes a hint about using Full Screen mode. Below the text is a screenshot of the Sandata Fuse application interface. This interface features a left-hand navigation menu with options: Navigate Modules, Dashboard, Clients, Employees, Scheduling (highlighted with a green box and a 'Click' callout), Visit Maintenance, and Billing. The main area of the application shows 'Filter Options' with a 'REFRESH EVERY' dropdown set to 5, a 'Minutes (2min - 30max)' input, and a 'SUPERVISORS' dropdown set to 'All'. Below these are two cards: 'Unknown Clients' and 'Unknown Employees', both showing a count of 0. A progress bar at the bottom indicates 0% completion. Navigation buttons for 'BACK' and 'CONTINUE' are at the bottom right.

Receive the Sandata  
Learn link from the  
agency administrator



Create an LMS account in  
Sandata Learn



Enroll in either self-paced  
or instructor-led courses  
on Sandata Learn

# Learning Pathways

Audience	System Overview	Client & Employee Management	Visit Capture	Visit Maintenance	Scheduling	Security	Aggregator
Provider Agency Administrator	X	X	X	X	X	X	
Staff - Intake	X	X					
Staff – Visits Maintenance	X		X	X			
Staff Scheduler	X			X	X		
Provider Agency Trainer	X	X	X	X	X	X	
Provider Agency using Alternate EVV vendor							X

# What Alternate EVV Aggregator Training is available?

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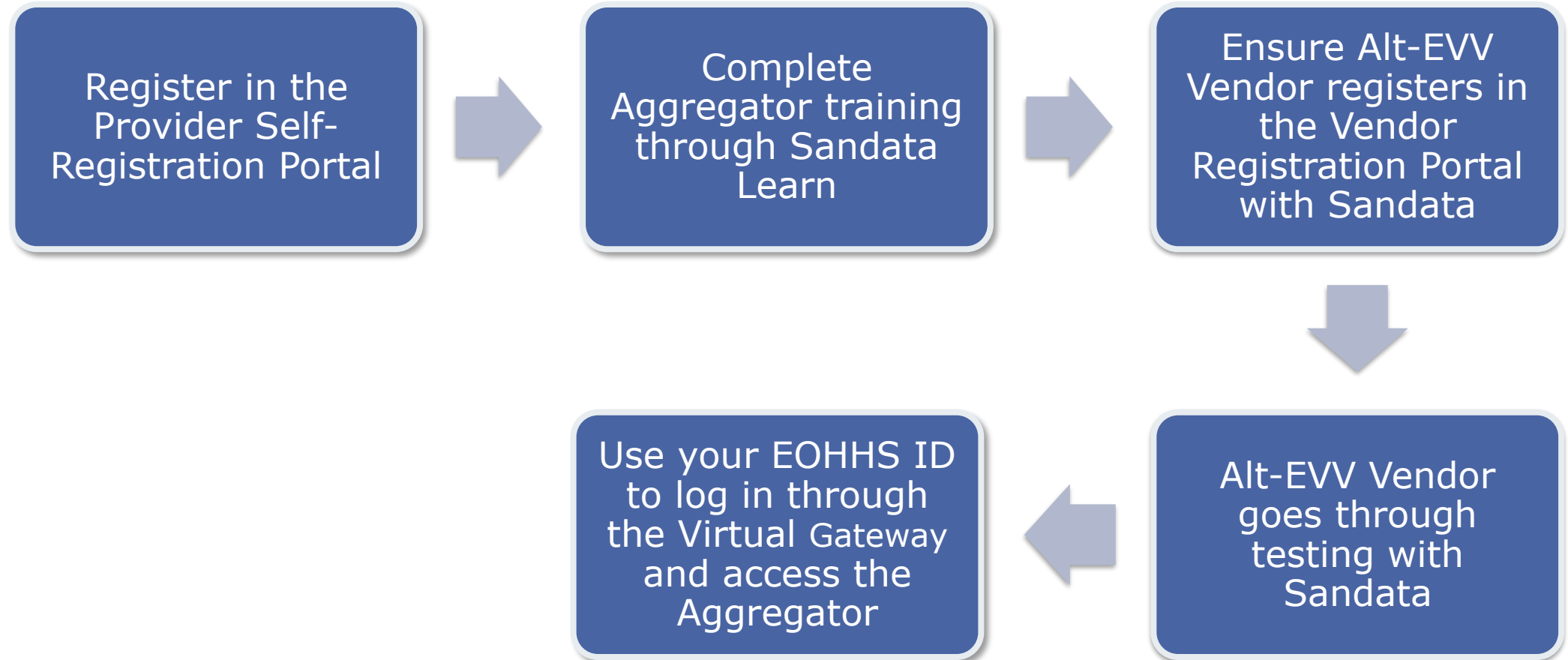
1. Online Course for Provider Agency users

2. Virtual Instructor-Led Training for State Entity Users

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



# Alt-EVV Agency Administrator Roadmap



# MA EOHHS Ready, Set, Go Implementation Checklist





# Ready-Set-Go!

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- Tailored checklist for staying on track to prepare for EVV launch
- Pre-Launch, System Launch Day, and more phases covered
- Links to crucial resources: Sandata On-Demand, training, and more
- Contacts, resources, and QA links

## **This checklist is for:**

- Provider Agency Administrators
- Provider office staff and
- Provider employees



# Pre-Launch Ready, Set, Go EVV Implementation Checklist

- **Providers, Administrators and Staff:**

- **Attend** Sandata town halls or [view recordings](#).
- **Obtain** Provider ID and Service Location (PIDSL) number:
  - [MassHealth Provider Portal](#)
  - [Provider Online Service Center](#)

- **Provider Agency Administrators:**

- **Assign** a primary user for Sandata EVV.
- **Submit** agency-based EVV User Request Form (URF) for SSO credentials.
  - **Note:** Use MyMassGov email for both provider portal registration and URF submission
- **Complete** Sandata EVV registration through Provider Self-Registration Portal.
- **Ensure** employees complete agency training and download the SMC app in preparation to record visits.

**Pre-Launch  
Ends  
September 29!**

# Launch Day Ready, Set, Go EVV Implementation Checklist

- **Provider Administrator:**

- **Access** Welcome Letter with Sandata EVV credentials.
- **Add** office staff to Sandata EVV system.
- **Grant** SMC app access to employees.
- **Align** services with each position in Sandata EVV.

**Launch Day  
September 30**

- **Employees:**

- **Download** and **log in** to Sandata Mobile Connect (SMC) to start using the app.
- **Begin** capturing visit data.

- **Contacts and Resources**

- **General Questions:** [EVVfeedback@Mass.gov](mailto:EVVfeedback@Mass.gov)
- **Technical Support:** Submit a Request on [Sandata On-Demand](#) or call 833.511.0164
- **MA-EOHHS EVV Website:** For additional details, visit the [MA-EOHHS EVV](#) website.

# Alt EVV Pre-Launch Ready, Set, Go Implementation Checklist

- **Providers, Administrators and Staff:**
  - **Attend** Sandata town halls or [view recordings](#).
  - **Obtain** Provider ID and Service Location (PIDSL) number:
    - [MassHealth Provider Portal](#)
    - [Provider Online Service Center](#)
- **Provider Agency Administrators:**
  - **Assign** a primary user for Sandata Aggregator
  - **Submit** agency-based EVV User Request Form (URF) for SSO credentials.
    - **Note:** Use MyMassGov email for both provider portal registration and URF submission
  - **Complete** provider registration through the Provider Self-Registration Portal.
  - **Ensure** you complete Aggregator training in Sandata Learn.

**Pre-Launch  
Ends  
September 29!**

# Alt EVV Launch Day Ready, Set, Go Implementation Checklist

- **Provider Administrator:**

- **Ensure** employees begin using your chosen EVV vendor to capture visit information.

- **Employees:**

- **Begin** capturing visit data.

- **Contacts and Resources**

- **General Questions:** [EVVfeedback@Mass.gov](mailto:EVVfeedback@Mass.gov)
- **Technical Support:** Submit a Request on [Sandata On-Demand](#) or call 833.511.0164
- **MA-EOHHS EVV Website:** For additional details, visit the [MA-EOHHS EVV](#) website.

**Launch Day  
September 30**



# Q&A Session



# Next Steps

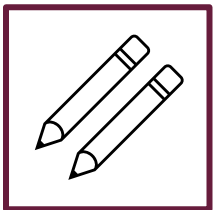


# EVV Program Implementation Next Steps



## **REGISTER AND LEARN:**

- Register your provider agency in the Sandata Provider Self-Registration Portal to let us know if you will be using Sandata EVV or an Alternate EVV vendor
- Review Town Hall Recordings and information at Sandata On-Demand [Massachusetts \(EOHHS\) Recorded Webinars – Sandata Technologies \(zendesk.com\)](#)
- Stay informed about EVV implementation through the Mass.gov EVV website, <https://www.mass.gov/topics/electronic-visit-verification-evv>
- Review Service Codes that require EVV, review Commonwealth policy Q&As



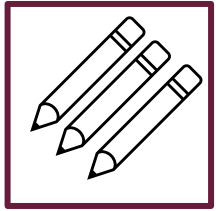
## **PREPARE:**

- Complete the Ready, Set, Go Checklist and to prepare your staff for account access and application use



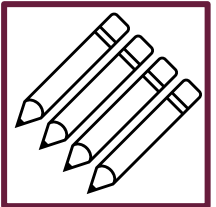
# EVV Program Implementation Next Steps- Continued

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## **ATTEND:**

- Keep an eye out for an invitation from your contracting entity for the last town hall scheduled for Tuesday, December 3<sup>rd</sup>, at 2 pm ET. We will provide program updates and assist with questions



## **REACH OUT:**

- Feel free to ask any questions by reaching out to the EVV mailbox: [EVVfeedback@Mass.gov](mailto:EVVfeedback@Mass.gov)



Thank you for attending today's town hall!

Please take a moment to fill out the post-event survey.



# Appendix



# Sandata Terminology



# Sandata Terminology

Sandata EVV Term	Business Definition / Use	Other Names/Terms
<b>Aggregator</b>	The view-only portal and underlying Sandata EVV repository for reporting and visit review of collected electronic visits transmitted by state providers.	Audit View Portal
<b>Authorization</b>	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.	Prior Authorization PAR (Prior Authorization Request)
<b>Claim</b>	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.	837 (both 837I and 837P) Encounter Bill
<b>Member</b>	The recipient of care from an employee.	Member Recipient of care Beneficiary Individual Consumer

# Sandata Terminology

Sandata EVV Term	Business Definition / Use	Other names/terms
<b>Employee</b>	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
<b>EVV Vendor</b>	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
<b>Payer</b>	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
<b>Program</b>	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
<b>Provider</b>	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.	Agencies Provider Agency Provider of Choice
<b>Service</b>	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.	HCPCS codes
<b>Visit</b>	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 ( <b>the 6 required elements</b> ) and if it meets program-specific rules.	Claim

# Sandata On-Demand Screen Shots





# Sandata On-Demand



Get more right from the start

New User Sign UpSubmit a requestSign in

Getting Started with Sandata On-DemandProduct HelpPayer ProgramsCaregiver and CDS Client LibraryEVV Vendor SolutionsProvi

### Articles in this section

Starting and Completing a Visit

Starting a Visit from the Clients Tab


Starting a Visit from the Search Client Tab (Known Client)

Starting a Visit from the Search Client tab (Unknown Client)

Starting a Scheduled Visit

Sandata Technologies / Product Help / Sandata Mobile Connect / Sandata Mobile Connect (English) / Starting a Visit

Follow



1. Go to the UPCOMING tab on the Visits screen.

2. Tap a visit from the list of available visits on the **UPCOMING** Tab.

# Sandata On-Demand

The screenshot displays the Sandata Learn platform interface. At the top, a banner reads "New Sandata Learn platform is live!". Below this, the text "How can we help?" is prominently displayed. A search bar is located at the bottom, with the placeholder text "Search" and a "Search" button. A chat bubble on the right side of the search bar contains the text: "Hi, I'm Sandy. Thanks for stopping by! Is there anything I can help you with today?". A callout box points to the search bar with the text: "Use the search bar or the pop-up chat bubble to find information." The background of the interface features various icons, including a cloud, a laptop, and a circular flow diagram.

Get more right from the start.

## New Sandata Learn platform is live!

How can we help?

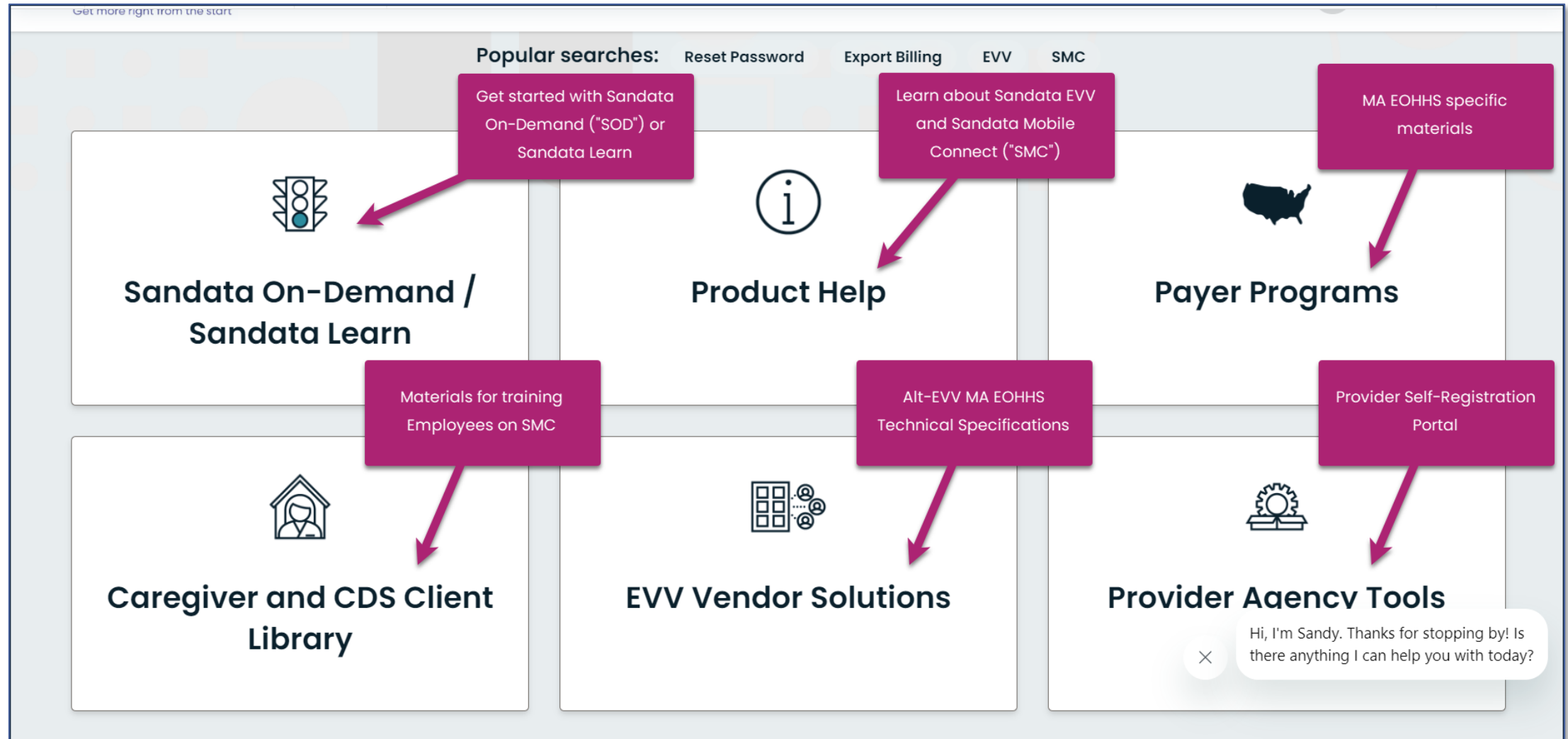
Use the search bar or the pop-up chat bubble to find information.

Start by typing key words or choose from popular searches below

Q Search Search

Hi, I'm Sandy. Thanks for stopping by! Is there anything I can help you with today?

# Sandata On-Demand



# Sandata On-Demand

The screenshot displays the Sandata On-Demand website interface. At the top left is the Sandata logo with the tagline "Get more right from the start". Below the logo is a search bar with a magnifying glass icon and the word "Search". To the right of the search bar is a teal "Search" button. Below the search bar is a navigation menu with several links: "Sandata On-Demand / Sandata Learn", "Product Help", "Payer Programs" (highlighted in a blue box), "Caregiver and CDS Client Library", "EVV Vendor Solutions", and "Provider". Below the navigation menu is a breadcrumb trail: "Sandata Technologies / Payer Programs / Massachusetts (EOHHS) / Massachusetts (EOHHS) Recorded Webinars". The main heading is "Massachusetts (EOHHS) Recorded Webinars". Below the heading is a "Follow" button. A list of webinars is shown, with the first item "Sandata EVV Town Hall for EOHHS 1 June 25, 2024" highlighted in a pink box. Two callout boxes provide additional information: one points to the "Payer Programs" link in the navigation menu, stating "No need to go back to the home page. Select the section you want to go to next."; the other points to the breadcrumb trail, stating "Breadcrumb navigation makes it easy to go back to where you want to be without the back button". At the bottom right, there is a chat bubble with a close button (X) and the text "Hi, I'm Sandy. Thanks for stopping by! Is there anything I can help you with today?".

Sandata  
Get more right from the start

Search

Sandata On-Demand / Sandata Learn Product Help **Payer Programs** Caregiver and CDS Client Library EVV Vendor Solutions Provider

Sandata Technologies / Payer Programs / Massachusetts (EOHHS) / Massachusetts (EOHHS) Recorded Webinars

## Massachusetts (EOHHS) Recorded Webinars

Follow

- Sandata EVV Town Hall for EOHHS 1 June 25, 2024

No need to go back to the home page. Select the section you want to go to next.

"Breadcrumb" navigation makes it easy to go back to where you want to be without the back button

Hi, I'm Sandy. Thanks for stopping by! Is there anything I can help you with today?

# Open EVV Model Option Screen Shots

# State-Provided System Screen Shots



# Sandata EVV Your State-Provided System

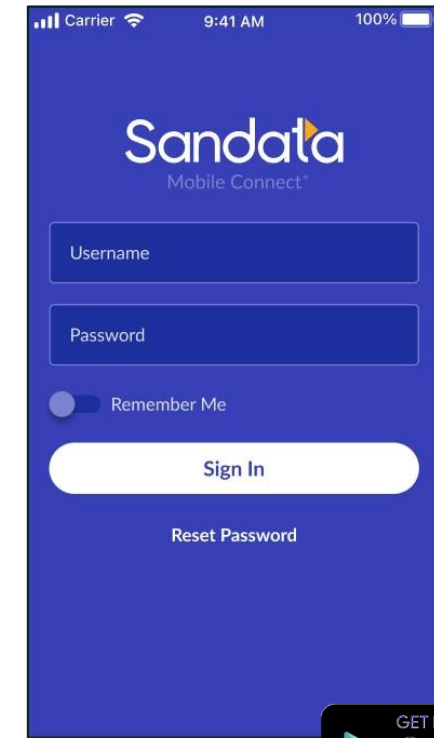
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- ▶ Each provider agency will need to register with Sandata and indicate if they are going to use Sandata EVV or an Alternate EVV system
  - ▶ We will review the provider registration process in more detail later in the presentation
- ▶ Provider agency administrators are required to 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
- ▶ Provider agency administrators and office staff can view and update visits in the Sandata EVV Visit Maintenance portal
- ▶ Member information will be supplied from the State's MMIS system and from EOE A
- ▶ 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 ONLY
- ▶ Encloses multiple languages (for the employee and member) to support diverse needs





# Alternate EVV System Screen Shots



# Alternate EVV (Alt EVV) at a High Level

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## **What is Alt EVV?**

- ▶ Provider agencies can use any EVV vendor system of their choice as long as the system can meet the requirements of the 21<sup>st</sup> Century Cures Act
- ▶ The Provider Agency's EVV vendor will submit data to the Sandata Aggregator
- ▶ Provider agencies can see their data in the Sandata Aggregator
- ▶ Qualified state users and plans can see the data that applies to them



# How it works....

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## **Capturing your Visits by**

- ▶ Utilize your selected vendor's capabilities for EVV capture
- ▶ Update and modify visits in your selected vendor's system
- ▶ Ensures requirements, including 21<sup>st</sup> Century Cures and EOHHS requirements, are included in visit data that is sent to the Sandata Aggregator

## **Send Visits to the Sandata Aggregator**

- ▶ Your selected vendor will daily transmit visit information via Alternate EVV specifications
- ▶ Sandata applies validation rules, checking member existence in EOHHS data and compliance with established rules
- ▶ Sandata's Aggregator applies business rules, known as exceptions, to capture visit information and flag data that may need to be resent



# Reviewing Alternate EVV Data in Sandata Aggregator

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## Visit Review Access

- ▶ Alt EVV system users will access Sandata Aggregator to check visit status
- ▶ Some Aggregator visits may have exceptions that need to be resolved in the Alt EVV vendor's system by provider staff

## Possible Data Issues

- ▶ Data may not appear in Sandata Aggregator due to:
  - ▶ Incorrect formatting, missing required fields, or non-compliance with Alternate EVV specifications
  - ▶ Member not in Massachusetts file transmission (MassHealth or EOEA)

## Updating Visits

- ▶ Provider agencies must correct data in their Vendor's Alt EVV system.
- ▶ Your selected vendor will resend updated visit with details on what information changed, who changed it and when and why it was edited

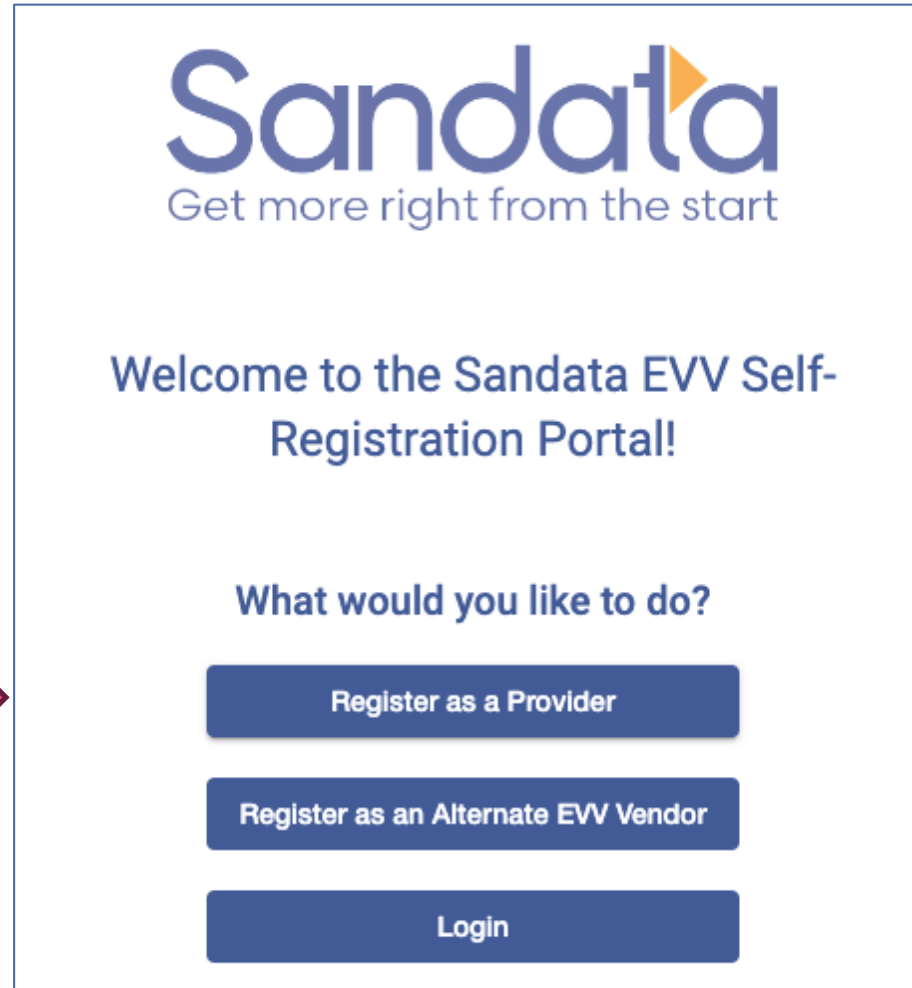


# Provider Self-Registration Portal Screen Shots



# Provider EVV Self-Registration Portal Landing Page

Select  
Register as a  
Provider



The screenshot shows the Sandata EVV Self-Registration Portal landing page. At the top is the Sandata logo with the tagline 'Get more right from the start'. Below this is a welcome message: 'Welcome to the Sandata EVV Self-Registration Portal!'. Underneath is the heading 'What would you like to do?' followed by three blue buttons: 'Register as a Provider', 'Register as an Alternate EVV Vendor', and 'Login'. A pink arrow from the text 'Select Register as a Provider' points to the first button.


# Provider Self-Registration - EVV Program Selection

Select  
Massachusetts  
EOHHS



Enter Provider  
Identification  
with Service  
Location  
(PIDSL)





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

# Provider Self-Registration Steps to Complete

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3 steps to complete

1 Enter Information and Verify Email

2 Create Login

3 Complete Registration





# Provider Self-Registration Required information

- Basic Information
  - Provider name
  - Type of provider
  - # of clients
  - # of employees
- Provider Identifier
  - PIDSL

# Sandata

This EVV provider registration should only be completed by one person from each provider organization. If you are an independent provider who works for yourself and has your own provider identifiers, you are the person to register. If you are an agency provider, only one person from the administrative staff of your organization needs to register your provider organization.

## Basic Information

ARE YOU AN INDEPENDENT PROVIDER OR ARE YOU A PROVIDER AGENCY? \*

☒ Independent Provider (I work for myself) ☐ Agency Provider

PROVIDER ACCOUNT NAME \* PROVIDER DOING BUSINESS AS

APPROXIMATE # OF CLIENTS SERVED \* APPROXIMATE # OF CAREGIVERS/STAFF IN PROVIDER ORGANIZATION \*

## Provider Identifiers

The Provider Identifiers section of this form will collect all of your unique provider identifiers for you as a provider in your state. These identifiers are used to identify you as a provider with the state and for billing. Your primary identifier was captured on the initial registration page. Adding additional identifiers is optional.

IDENTIFIER TYPE	IDENTIFIER	ACTIONS
IDENTIFIER TYPE	IDENTIFIER	
Medicaid ID	684567047	

Add

NOTE: YOUR PRIMARY IDENTIFIER HAS BEEN CARRIED OVER FROM THE PREVIOUS PAGE. ADDING ADDITIONAL PROVIDER IDENTIFIERS IS OPTIONAL BUT ENCOURAGED.

# Provider Self-Registration Required information

- Provider Agency Administrator Contact Information
  - Address
  - Email
  - Phone number
- Intent to use Sandata EVV or an alternate EVV vendor
  - Vendor name (if applicable)
  - Vendor contact (if applicable)

### Contact Information

Address

ADDRESS LINE 1 \*ADDRESS LINE 2

CITY \*STATE \*

ZIP CODE \*COUNTY

#####-#### OR #####

PROVIDER PHONE NUMBER \*  
###-###-####

Provider User Contact Information

PROVIDER USER FIRST NAME \*PROVIDER USER LAST NAME \*

Provider User First NameProvider User Last Name

PROVIDER USER EMAIL \*CONFIRM PROVIDER USER EMAIL \*

JDoe@example.comJDoe@example.com

SECURITY CODE SENT TO EMAIL \*

Enter security code sent to email address

Verify Email

Verify Code

### Additional Information

Providers have the option to use the state-provided EVV system, Sandata EVV, or an alternate EVV system.

If you will be using the Sandata EVV system, please select "YES" below. You will receive an email upon completion of this registration with next steps in the onboarding process.

If you will be using a different EVV system, please select "NO" below and specify the software vendor who will be collecting and transmitting your visit data to the state.

If you are unsure whether you will be using the Sandata EVV system or an alternate EVV system, please select the "Help me decide" option below.

AS A PROVIDER, WILL YOU BE USING THE SANDATA EVV SYSTEM TO COLLECT EVV VISIT DATA?

☒ Yes ☐ No ☐ Help me decide

Submit

# Provider Self-Registration Completion

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1 Enter Information and Verify Email ✓

2 Create Login ✓

3 Complete Registration ✓



## EVV Provider Self-Registration

Congratulations! Your Electronic Visit Verification (EVV) provider registration has been successfully submitted.

You can now access [Sandata On-Demand](#) (SoD) for information about EVV, your tickets, and more. Click [here](#) to learn more about getting started with Sandata on Demand.

Please check your email for information regarding next steps in the EVV onboarding process.

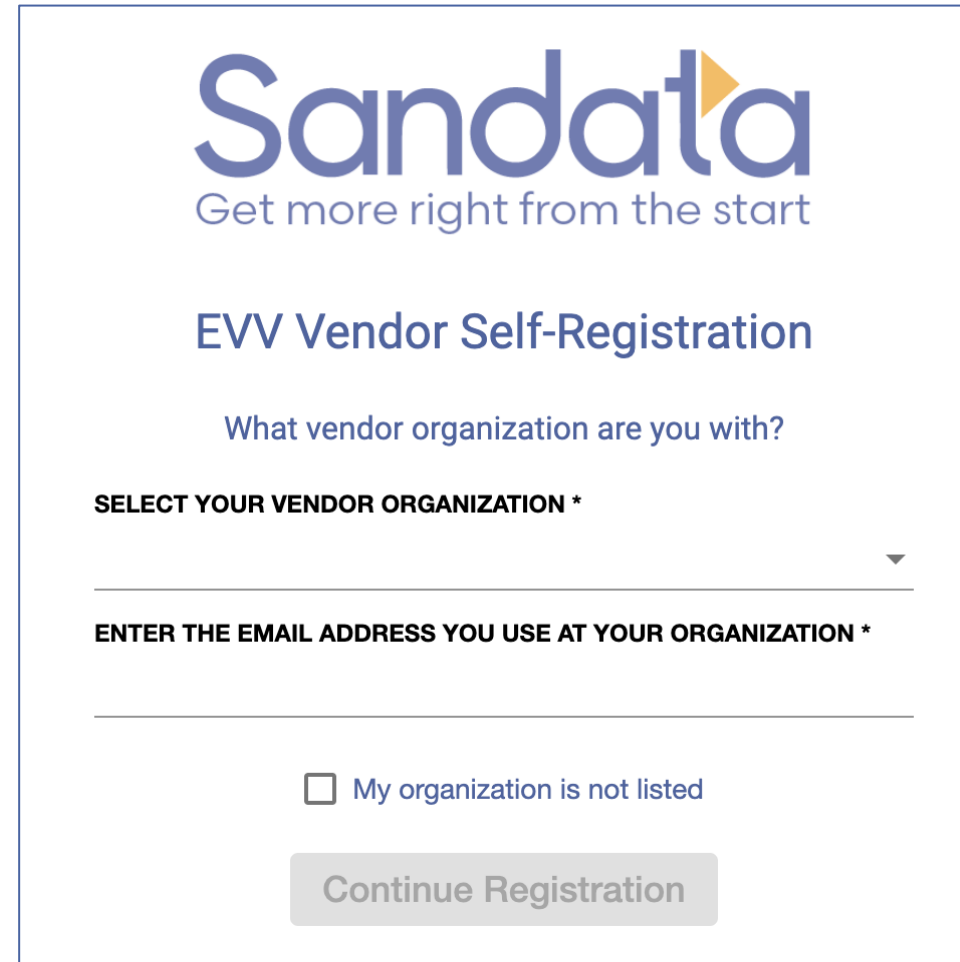
Thank you, and we look forward to working with you!

# Vendor EVV Self-Registration Portal Screen Shots



# EVV Vendor Self-Registration

- ▶ Vendors would select their organization and the email address to use.
- ▶ Vendor must already exist
- ▶ The user email address must be associated with the vendor in our Zendesk system.
- ▶ At least one provider must have noted that vendor as their vendor of choice



The screenshot shows the Sandata EVV Vendor Self-Registration interface. At the top is the Sandata logo with the tagline "Get more right from the start". Below this is the title "EVV Vendor Self-Registration" and a question "What vendor organization are you with?". The form has two main input sections: "SELECT YOUR VENDOR ORGANIZATION \*" with a dropdown arrow, and "ENTER THE EMAIL ADDRESS YOU USE AT YOUR ORGANIZATION \*" with a text input field. Below the email field is a checkbox labeled "My organization is not listed". At the bottom is a grey button labeled "Continue Registration".

**Sandata**  
Get more right from the start

## EVV Vendor Self-Registration

What vendor organization are you with?

**SELECT YOUR VENDOR ORGANIZATION \***

\_\_\_\_\_ ▼

**ENTER THE EMAIL ADDRESS YOU USE AT YOUR ORGANIZATION \***

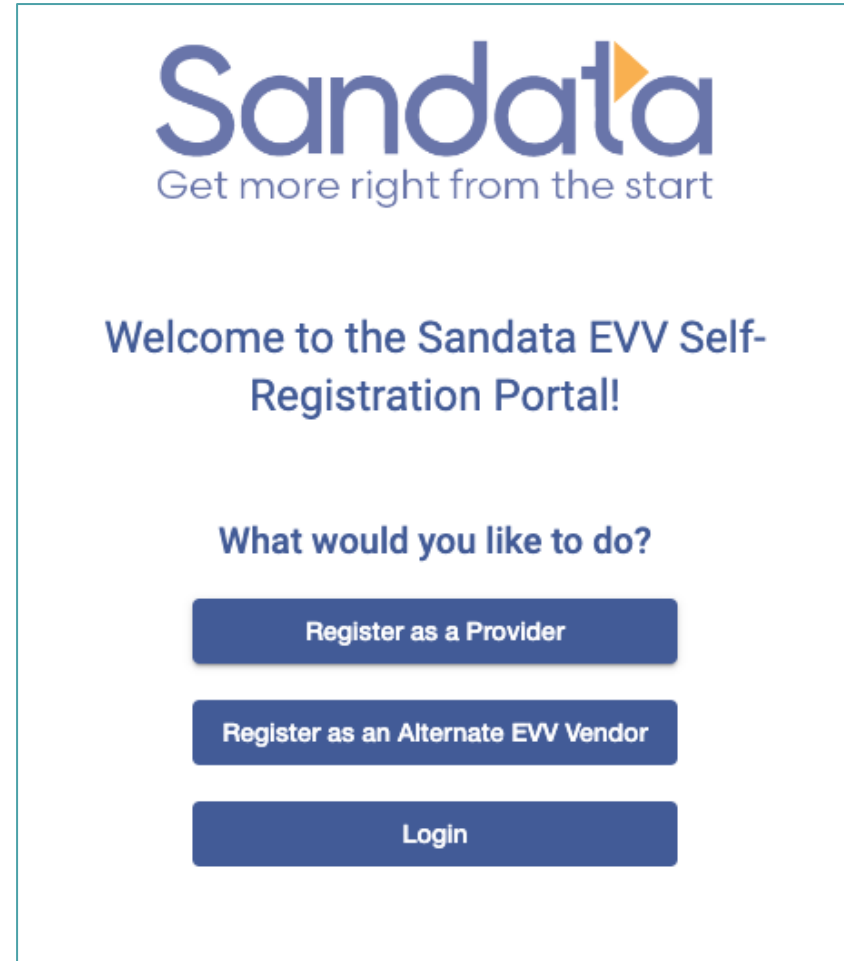
\_\_\_\_\_

☐ My organization is not listed

**Continue Registration**

# EVV Vendor Landing Page

- ▶ Vendors will go to the portal link
- ▶ If a vendor has never logged in before for the Massachusetts program, they would need to Register as an Alternate EVV Vendor
- ▶ If a vendor is a returning vendor, they would Login



The screenshot shows the Sandata EVV Self-Registration Portal landing page. At the top is the Sandata logo with the tagline "Get more right from the start". Below this is a welcome message: "Welcome to the Sandata EVV Self-Registration Portal!". Underneath the welcome message is the question "What would you like to do?". There are three blue buttons stacked vertically: "Register as a Provider", "Register as an Alternate EVV Vendor", and "Login".

**Sandata**  
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

# Program Selection

- ▶ Vendor will select the Massachusetts program from the drop down
- ▶ Select Continue Registration



**Sandata**  
Get more right from the start

## EVV Vendor Self-Registration

Select the state EVV program in which you would like to register your vendor organization:

**CHOOSE EVV STATE PROGRAM \***


Massachusetts EOHHS ▼

**Note: If you do not see an EVV state program listed, then the EVV state program is not eligible for registration in the portal at this time.**

**Continue Registration**

# Vendor Registration – Select Provider

- ▶ The vendor will be shown the list of providers who have identified them as their vendor.
- ▶ If no providers, they will be stopped at the previous screen and will not be allowed to proceed.
- ▶ Vendor will select one provider for certification
- ▶ Finish Registration

  
Get more right from the start

EVV Vendor Self-Registration

These providers have indicated that ABCSRCM will be their Alt EVV vendor. Please select a provider for certification:

Zheng Fei - Medicaid ID 558749143B
Cards - 684567047 - Medicaid ID
MA Provider Three - Medicaid ID 569215789

Finish Registration

Note: The provider you select for certification will be the first provider for which you are connected in production and will receive production credentials. Once your organization is successfully certified, you will be able to connect to additional providers in the portal.



# Vendor Home Page

**Sandata** <  
EW Self-Registration Portal

Home

Manage Payer Programs

- Arizona (AHCCCS)
- BlueCare TN Home Health
- California (CalEVV)
- Colorado HCPF
- Connecticut Dept. of Social Services
- Delaware Health and Social Services
- District of Columbia DHCF
- Hawaii Med-QUEST
- Idaho DHW
- Illinois DHS
- Indiana FSSA
- Maine DHHS
- Massachusetts EOHHS
- Nevada Division of Health Care Financing and Policy (NV-DHCFP)
- North Carolina DHHS

### Payer Program Summary

Payer Program	Status
Arizona (AHCCCS)	Certification In Progress
BlueCare TN Home Health	Certification In Progress
California (CalEVV)	Certification In Progress
Colorado HCPF	Certification In Progress
Connecticut Dept. of Social Services	Certification In Progress
Delaware Health and Social Services	Certification In Progress
District of Columbia DHCF	Certification In Progress
Hawaii Med-QUEST	Certification In Progress
Idaho DHW	Certification In Progress
Illinois DHS	Certification In Progress
Indiana FSSA	Certification In Progress
Maine DHHS	Certification In Progress
Massachusetts EOHHS	Certification Not Started
Nevada Division of Health Care Financing and Policy (NV-DHCFP)	Certification In Progress

- ▶ Vendors will see all their status as a vendor.
- ▶ Navigation links can be expanded to see all programs the vendor participates in.
- ▶ Vendors can navigate via either the blue navigation panel or by selecting the program name in the Payer Program Summary

# Certification Process

Manage Payer Programs > **Massachusetts EOHHS** ABCSRCM - F Beaubien ▾

**Massachusetts EOHHS** ⋮ Certification Not Started

**Test Creds**    Conduct and Review Testing    Prod Creds    Program Resources

Get Testing Credentials

**Test Account**    **Test Provider ID**

.....

**Username**    **Password**

.....

**Name and Provider ID of Provider Indicated for Testing**

Zheng Fei - 558749143B

.....

- ▶ Vendors can request test credentials
- ▶ Vendor test credentials will be displayed on screen
- ▶ Vendors will receive password via email
- ▶ Vendors can Conduct and Review Testing

## Certification Process, cont'd

The screenshot shows the Sandata EVV Self-Registration Portal interface. On the left is a dark blue sidebar with the Sandata logo and 'EVV Self-Registration Portal' text. Below this is a 'Home' button and a 'Manage Payer Programs' section with a list of programs: BlueCare TN Home Health, California (CalEVV), and Colorado HCPE. The main content area has a header for 'Massachusetts EOHHS' with a three-dot menu and a yellow 'Certification In Progress' button. Below the header is a progress bar with four steps: 'Test Creds' (checked with a green checkmark), 'Conduct and Review Testing' (active), 'Prod Creds', and 'Program Resources'. Under the active step, there is a bold instruction: 'Click each link to view the resources available on Sandata on Demand for this program:'. Below this instruction are two links: 'Commonwealth of Massachusetts Alternate EVV Technical Specifications' and 'Test Clients'.

- ▶ Vendors can access available resources including test scenarios and test clients
- ▶ Vendors can Conduct and Review Testing at their own pace
- ▶ Results can be seen in near real time after clicking “Refresh Test Files”
- ▶ Reminders are sent to the vendors periodically to remind them to complete testing

# Certification Process, cont'd

Manage Payer Programs > Ohio (OH ODM)

ABCSRCM - F Beaubien

Ohio (OH ODM)

Certified In Prod

Test Creds

Conduct and Review Testing

Prod Creds

Program Resources

Production Credentials by Provider

Search

Provider Name	Provider ID	Prod Account	Username	Request New Password
ODM 3P Demo 1	1009500	10095	ldsnmzdctf	<input type="checkbox"/>

Request Password

- ▶ Vendors must pass all required testing scenarios.
- ▶ Once passed, vendors can request their production credentials.
- ▶ Production credentials are displayed on the screen..
- ▶ Password is sent via email.
- ▶ Vendors can also request a new password, if needed.

# Provider Next steps

- ▶ Once the vendor requests credentials for the provider, the provider will receive an email notifying them that their vendor of choice is certified to send data to the Sandata Aggregator.
- ▶ The provider will receive instructions on next steps, including training.

Dear Provider,

Congratulations! Your Alternate EVV (Alt EVV) vendor, TESTVENDOR, has been successfully certified to send data to the Sandata Aggregator on your behalf, and their production credentials have been issued. The EVV account for your organization will appear in the Aggregator as USAAUVEIS - 234483.

All providers who use an Alternate EVV solution will need access to see their visits as their EVV program payer sees them in the Aggregator. This is made possible by logging into the Sandata Aggregator.

## Next Steps

### 1. Get Your MassHealth ID

If you have not yet gotten a MassHealth ID, submit a User Request Form on the Mass.gov website. You will need a MassHealth ID to log in to the Sandata Aggregator.

NOTE: You must use the same email for your MassHealth ID that you used to register in the Sandata Self-Registration Provider Portal. If those emails do not match up, please [contact](#) Sandata Customer Support.

### 2. Complete Training

Training is free and easy. Register in [Sandata Learn](#) take the Aggregator training.

### 3. Log in to the Sandata Aggregator

Once you have taken training, access the Sandata Aggregator from the Mass.gov Virtual Gateway.

1. Sign in with your MassHealth ID
2. Select the **Sandata EVV** button

Once on the Aggregator login page, select **Forgot Password** to create your password for your username. After you have followed the process to set up your password, log into the Aggregator by setting the login fields like this:

AGENCY: Leave field as-is with the "STX" and nothing else in it.

USERNAME:

[Use the email associated with your MassHealth ID and Sandata provider accounts.](#)

PASSWORD: Enter your new password.

Once you are signed in, you will see your EVV account (STX) number in the upper righthand corner of the screen. It is important to document the STX number, especially if you provide or manage services under more than one account as an agency staff member or if you record visits both as an independent provider and as an agency employee.

If you have any questions regarding this process or need help, please [Submit a Request](#) via Sandata On-Demand.

Sincerely,

Sandata Support

# Getting Vendor Credentials for Other Massachusetts Providers

- ▶ Once a vendor has passed testing for one provider, other providers who have specified them as their vendor are visible via the portal.
- ▶ Vendor can select the other providers for production credentials.

**Providers Available for Production Credentials** ⓘ

Provider Name and Provider ID	Select Provider for Prod Cred Creation
Tom K Smith 009 - 5698517014	<input type="checkbox"/>
Llull - 250309472	<input type="checkbox"/>

Get Prod Creds



# Alternate EVV Specification Review with Vendors Screen Shots



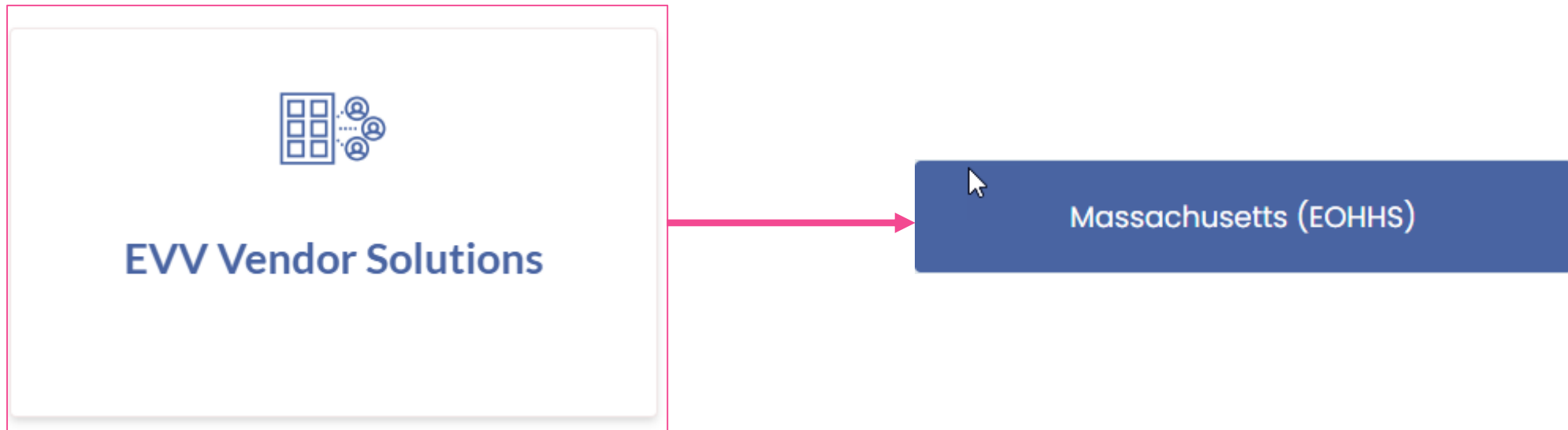
# Alternate EVV Vendor Specifications

When you access Sandata On Demand, you will see a tile for EVV Vendor Solutions

After clicking on that tile, you will see tiles for each state.

Choose the Massachusetts ( EOHHS) tile to get content/information relevant to this program.

Current alternate EVV vendor specifications will be found here.





# Alt EVV Overview

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- Vendors must send data via Web Service API using JSON to Sandata, following specified endpoints
- Each vendor needs to submit three separate JSON files
  - Client
  - Employee
  - Visit
- Client and employee records must be sent and received successfully before sending visit data
- Data sent to Sandata will be visible in the Aggregator.



# MA Specific Rules

- ▶ Five Services require an Overnight Split.

HCPSC Code	Modifier 1	Modifier 2
S9129	UB	
S5135	UB	
S5135	UB	U1
S5130	UB	
S5125	UB	

- ▶ Signatures Are Required.
  - ▶ New Type of Reason Code - If Signature is not Collected, Why it wasn't is Required.

- ▶ Please refer to all Payer/Program Service Combinations in the Massachusetts Technical Specifications.
- ▶ If there is no Medicaid ID for the Client, send the EOE Consumer ID. See Massachusetts Technical Specifications for which fields utilize this information.



# Client Overview

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- Four Segments for client records:
  - Client General – Required
  - Client Payer - Optional
  - Client Address - Optional
  - Client Phone – Optional
- Identifiers used for matching logic:
  - Provider information
    - ProviderQualifier: "Other"
    - ProviderIdentifier: The First 9 Digits of the Provider PIDSL.
  - Client Information
    - ClientQualifier: "ClientMedicaidID". When the Client has a "Medicaid ID"; "ClientCustomID" when Client has EOEA "ConsumerID" only.
    - ClientIdentifier: 12 Digit Medicaid ID or 10-12 Digit Consumer ID

# Client Overview

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## Client Validation

- Data must match State/EOEA records: Client Medicaid ID or Consumer ID + Date of Birth
- Check fields for special characters as specified



# Client Overview: JSON

#	Element	Description	Max Length	Type	Required?	Expected Value and Rules
<b>Segment - ProviderIdentification - Required for the Client, Employee and Visit Endpoints</b>						
1	ProviderQualifier	Unique identifier for the provider as determined by the program definition.	20	String	Yes	Send the literal value 'Other'.
2	ProviderID	Unique identifier for the agency. ID type must match to the ProviderQualifier value being passed for Provider validation and lookup.	50	String	Yes	Should be the 9-Digit Identifier for the Provider  This is the first 9 digits of the MA known PIDS.
#	Element	Description	Max Length	Type	Required?	Expected Value and Rules
<b>ClientGeneralInformation - Required</b>						
1	ClientQualifier	Value being sent to uniquely identify the client. Should be the same as the value sent by the Payer if a client is provided by the Payer	64	String	Yes	"ClientMedicaidID" when client has a Medicaid ID. "ClientCustomID" when client does not have a Medicaid ID.
2	ClientIdentifier	Unique client identifier used by the state to reference the member data across all Medicaid activities.	30	String	Yes	Use either the MID 12 Character Numeric Always 12 (no trimming of leading anything) or the EOE ID (Consumer ID, 10-12 digits) in this field.
3	ClientFirstName	Client's First Name.	30	String	Yes	Only the following special character will be accepted: Alpha Letters Hyphens Periods Apostrophe All other special characters will be rejected.
4	ClientMiddleInitial	Client's Middle Initial.	1	String	No	Client's Middle Initial (Values A-Z)
5	ClientLastName	Client's Last Name.	30	String	Yes	Only the following special character will be accepted: Alpha Letters Hyphens Periods Apostrophe All other special characters will be rejected.

{{

```

"ProviderIdentification": {
  "ProviderQualifier": "Other",
  "ProviderID": "123456789"
},
"ClientFirstName": "Test",
"ClientMiddleInitial": "T",
"ClientLastName": "Client",
"ClientQualifier": "ClientMedicaidID",
"ClientMedicaidID": "123456789012",
"ClientIdentifier": "123456789012",
"SequenceID": 1,
"ClientCustomID": "",
"ClientOtherID": "2222",
"ClientTimezone": "US/Eastern",
"ClientPayerInformation": [{
  "PayerID": "MAHEA",
  "PayerProgram": "HH",
  "ProcedureCode": "T1503",
  "ClientPayerID": "987654321",
  "ClientStatus": "02",
  "EffectiveStartDate": "",
  "EffectiveEndDate": ""
}

```

}},

# Employee Overview

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- One Segments for Employee Records
  - Employee General - Required
- Identifiers are used for matching logic
  - Provider information
    - ProviderQualifier: "Other"
    - ProviderIdentifier: The First 9 Digits of the Provider PIDSL.
  - Employee Information
    - EmployeeQualifier: "EmployeeCustomID"
    - EmployeeIdentifier: Provide a unique identifier for each employee based on the originating system
- Employee Validation
  - EmployeeIdentifier will be matched to existing records to:
    - Insert new record if no match found
    - Update existing record if matched



# Employee Overview: JSON

#	Element	Description	Max Length	Type	Required?	Expected Value and Rules
<b>Segment - ProviderIdentification - Required for the Client, Employee and Visit Endpoints</b>						
1	ProviderQualifier	Unique identifier for the provider as determined by the program definition.	20	String	Yes	Send the literal value 'Other'.
2	ProviderID	Unique identifier for the agency. ID type must match to the ProviderQualifier value being passed for Provider validation and lookup.	50	String	Yes	Should be the 9-Digit Identifier for the Provider  This is the first 9 digits of the MA known PIDSL.
#	Element	Description	Max Length	Type	Required?	Expected Value and Rules
<b>EmployeeGeneralInformation - Required</b>						
Required data in the body of the transmission. This segment provides the basic information about the employee.						
1	EmployeeQualifier	Descriptive reference of the value being sent to uniquely identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String	Yes	Value: "EmployeeCustomID"
2	EmployeeIdentifier	Employee identifier identified by EmployeeQualifier. This value must equal the EmployeeIdentifier provided in the Visit transmission.	9	String	Yes	Please provide a unique system identifier for the employee.
3	EmployeeOtherID	Unique employee identifier in the external system. This value is used to identify the employee when an updated record is received.	64	String	No	Vendor Supplied value based on Vendor's solutions. Unique ID for each employee.
4	SequenceID	The Third-Party EVV visit sequence ID to which the change applied.	16	Integer	Yes	Third-Party EVV Visit Sequence ID. If TIMESTAMP is used: YYYYMMDDHHMMSS Numbers only; no other characters.

```
[
{
  "ProviderIdentification": {
    "ProviderQualifier": "Other",
    "ProviderID": "123456789"
  },
  "EmployeeQualifier": "EmployeeCustomID",
  "EmployeeIdentifier": "999999999",
  "EmployeeOtherID": "2222",
  "SequenceID": 1,
  "EmployeeSSN": "",
  "EmployeeLastName": "Employee",
  "EmployeeFirstName": "Test",
  "EmployeeEmail": "dummy@sandata.com",
}
]
```

# Visit Overview

---

- One Required Segments for Visit Records
  - Visit General
- Four Conditional Segments for Visit Records
  - Calls
  - Visit Exceptions
  - Visit Changes
  - Visit Exception Acknowledgement
- Identifiers are used for matching logic
  - ProviderID value: The First 9 Digits of the Provider PIDSL.
  - VisitOtherID value: Unique value from external vendor system—allows for updates to the visit
  - ClientIdentifier value: “ClientMedicaidID”. When the Client has a Medicaid ID; “ClientCustomID” when Client has an EOE “ConsumerID”.
  - EmployeeIdentifier value: Provide a unique identifier for each employee matching to the value sent in the Employee file.



# Visit Overview: JSON

#	Element	Description	Max Length	Type	Required?	Expected Value and Rules
<b>Segment - ProviderIdentification - Required for the Client, Employee and Visit Endpoints</b>						
1	ProviderQualifier	Unique identifier for the provider as determined by the program definition.	20	String	Yes	Send the literal value 'Other'.
2	ProviderID	Unique identifier for the agency. ID type must match to the ProviderQualifier value being passed for Provider validation and lookup.	50	String	Yes	Should be the 9-Digit Identifier for the Provider  This is the first 9 digits of the MA known PIDSL
#	Element	Description	Max Length	Type	Required?	Expected Value and Rules
<b>VisitGeneralInformation - Required</b>						
Required segment provides the base data regarding an EVV visit. If a visit is changed (corrections, alterations, updates) over time, the same visit may be delivered multiple times, <b>each sharing the same 'VisitOtherID'</b> , but each change represented with a different Sequence ID- ascending over time- to allow the state's Aggregator system to keep the changes ordered appropriately. Each update requires a 'VisitChanges' segment.						
1	VisitOtherID	Unique Visit identifier in the external system.	50	String	Yes	Visit Identifier No special characters
2	SequenceID	The Third-Party EVV visit sequence ID to which the change applied.	16	Integer	Yes	Third-Party EVV Visit Sequence ID If TIMESTAMP is used: YYYYMMDDHHMMSS Numbers only; no other characters.
3	EmployeeQualifier	Descriptive reference of the value being sent to uniquely identify the employee. This should be the same as the value sent in the Employee Data Endpoint.	20	String	Yes	"EmployeeCustomID"
4	EmployeeOtherID	Unique employee identifier in the external system. The EmployeeOtherID format must be consistent in both the EmployeeGeneral and VisitGeneral segments.	64	String	No	Vendor Supplied value based on Vendor's solutions. Unique ID for each employee.
5	EmployeeIdentifier	Employee identifier identified by EmployeeQualifier. This value must equal the EmployeeIdentifier provided in the Employee transmission.	9	String	Yes	Please provide a unique system identifier for the employee.

```
[
{
  "ProviderIdentification": {
    "ProviderID": "123456789",
    "ProviderQualifier": "Other"
  },
  "VisitOtherID": "123456789",
  "SequenceID": 1,
  "EmployeeQualifier": "EmployeeCustomID",
  "EmployeeOtherID": "999999999",
  "EmployeeIdentifier": "999999999",
  "GroupCode": null,
  "ClientIDQualifier": "ClientMedicaidID",
  "ClientID": "123456789012",
  "ClientOtherID": "",
  "VisitCancelledIndicator": false,
  "PayerID": "MAHEA",
  "PayerProgram": "HH",
  "ProcedureCode": "T1503",
  "Modifier1": null,
  "Modifier2": null,
  "Modifier3": null,
  "Modifier4": null,
  "VisitTimeZone": "US/Eastern",
}
```

# Visit Exceptions

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- Exceptions ensure data aligns with program definitions, causing incomplete visit status when applied
- All Visits with or without exceptions may be viewed in the Aggregator.
- For errors, correct data in source system and resubmit with change reason (visit changes/exception acknowledgment)
- Fixing vs. Acknowledging:
  - Fixing: Address in vendor system, resend corrected data with reason code
  - Acknowledging: Note in Vendor System, apply reason code, vendor forwards acknowledgment to Sandata.



# EOHHS EVV Program Exceptions

Exception Code	Exception Name	Description	Acknowledge / Fix
0	Unknown Client	Exception for a visit that was performed for a client that is not yet entered or not found in the EVV system.	Fix: Resubmit visit. Visit will be rejected without a Client.
1	Unknown Employee	Exception for a visit that was performed by an employee that is not yet entered or not found in the EVV system.	Fix: Resubmit visit. Visit will be rejected without an Employee.
14	Missing Payer	The payer on the visit could not be determined.	Fix: Resubmit corrected visit with a payer.
23	Missing Service	Exception when the service provided during a visit is not recorded or present in the system.	Fix: Resubmit corrected visit with a service.
42	Missing Location	A value of Home/Community has not been applied to the visit	Acknowledge: this exception must be acknowledged using the VisitExceptionAcknowledgement segment.
2	Visits Without Any Calls	Exception thrown when a visit is recorded without an "in" call and without an "out" call for the visit.	Fix: The user(s) must provide adjusted times for the visit assuming the visit was completed before the visit was sent.

# EOHHS EVV Program Exceptions

Exception Code	Exception Name	Description	Acknowledge / Fix
3	Visits Without In-Call	Exception thrown when a visit is recorded without an "in" call that began the visit.	Fix: The user(s) must provide adjusted times for the visit assuming the visit was completed before the visit was sent .
4	Visits Without Out Call	Exception thrown when a visit is recorded without an "out" call that completed the visit.	Fix: The user(s) must provide adjusted times for the visit assuming the visit was completed before the visit was sent.
20	Short Visit	(Scheduling Only) Calculated for any visit where the length of the visit is less than the scheduled duration by more than a tolerance. Will not be calculated without a schedule.	Fix or Acknowledge: Acknowledge or provide adjusted times. If the exception is being acknowledged, submit the VisitExceptionAcknowledgement segment.
8	Actual Hours more than Scheduled Hours	(Scheduling only) This occurs when the actual hours for the visit exceed the total scheduled hours for the associated visit in the schedule.	Acknowledge the exception by submitting the VisitExceptionAcknowledgement segment.
3	Visits Without In-Call	Exception thrown when a visit is recorded without an "in" call that began the visit.	Fix: The user(s) must provide adjusted times for the visit assuming the visit was completed before the visit was sent .