Sandata Electronic Visit Verification™

While the instructional materials contain the general functionality of the system, set up is contingent on agency/payer directed configuration. When available, please refer to the agency/payer specific training materials to obtain information on the work flow and the applicable functionality.

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Document Scope

This document details the functionality of the Sandata Electronic Visit Verification (EVV) application. Sandata EVV is a web-based application accessed via a supported web browser (Google Chrome, Microsoft Edge, and Mozilla Firefox). Sandata EVV allows users to perform paperless capture, review and optional approval of visits as well as client and employee maintenance. The system can also receive client/employee information from an interface used by a payer, agency management system or fiscal agent. Client and employee data can also be manually entered into the Sandata EVV.

The different sections of Sandata EVV are shown on the left hand navigation panel. This panel displays all available sections of the system (e.g Reports, Security, etc). Access to the different sections of Sandata EVV is determined by the roles and/or security permissions assigned to each user.

Note:
Based on account configuration and user permissions, some sections of the application may not be available.

Browser Requirements

Sandata supports the current and prior major releases of Microsoft Edge, Mozilla Firefox, and Google Chrome on a rolling basis. This policy to support modern browsers allows Sandata to take advantage of the most recent efficiencies in web browsers to maximize user experience and also ensure Sandata's solutions are running on the most recent security and performance updates. If the browser being used to access the system is no longer supported, a message displays on the Sandata EVV login screen reading "Sandata EVV no longer supports this browser".

Note:
Sandata EVV does not currently support the Apple Safari browser.

System Security

Sandata EVV has many system security features, including:

1. Automatic Logout - Users are automatically logged out of the system after a period of inactivity. When users remain idle for 15 minutes (default value) a warning message displays. For accessibility reasons, users have 2 additional minutes to respond to the prompt and extend the session.

2. Password Rules - Sandata EVV has several rules to ensure passwords are secure. Passwords must:

   A. Include an upper and lowercase character.

   B. Include at least one special characters (For example: !@#$&).

   C. Not include any part of the username.

   D. Not include more than two consecutive characters from the user’s full name.

   E. Not include more than two consecutive characters from the account’s name.

   F. Be at least twelve characters in length.

3. Automatic Password Expiration - Passwords expire after a configurable number of days. Beginning 10 days before password expiration, after logging in, users are redirected to the Change Password screen, where they can change their password or skip the password change process and continue into the application. This occurs each day until the password is updated. If a user logs in with an expired password, the Change Password screen displays and the password must be updated before the user can log into the system

4. Multi-Factor Authentication - .When enabled, users must provide an additional passcode from their mobile device or email as part of the log-in process.

Note:
For security purposes, the password rules may increase over time.

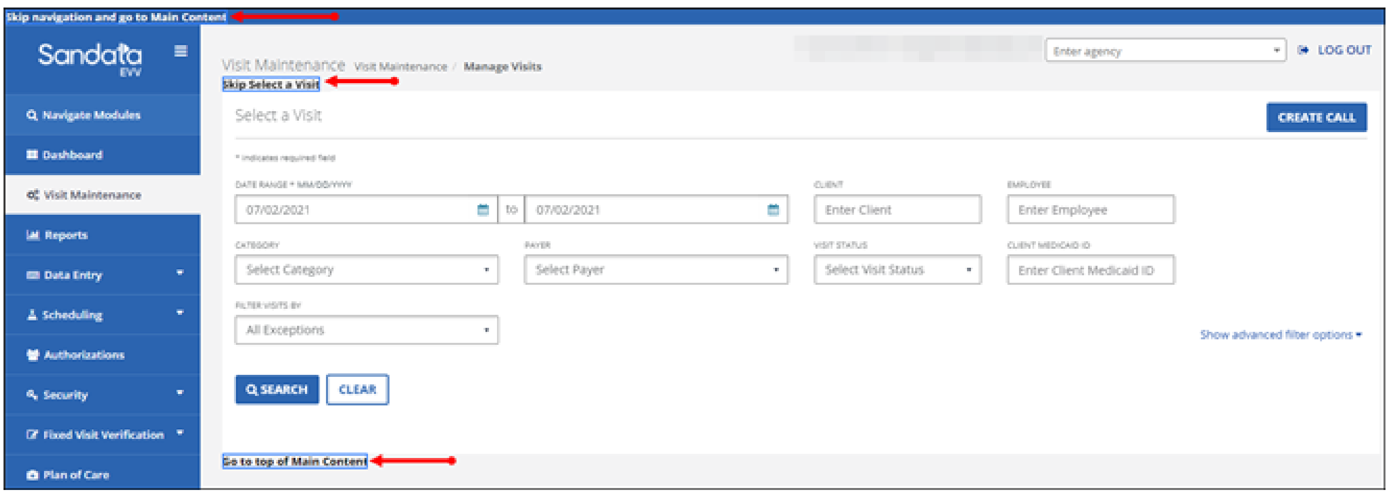
ADA Support

Sandata EVV is designed to be compliant with the Americans with Disabilities Act (ADA). Sandata EVV is Job Access with Speech (JAWS) Reader compliant, meaning sections of the screen are read aloud for users who cannot see the screen. The color scheme and contrast ratio is designed to be accessible for users with color blindness or low vision. Each screen of the application is designed to be dynamic, so that if a user increases the size of the screen, fields shift automatically to accommodate the change. For users who cannot operate a mouse the system can be navigated using only a key-board.

Keyboard Only Navigation

Use these instructions to navigate Sandata EVV with only a keyboard.

- Press <**Tab**> to move through the system. When using <**Tab**> to navigate through the options, the links indicated below display individually. Press <**Enter**> when one of these links is selected to jump to the indicated section of the screen.



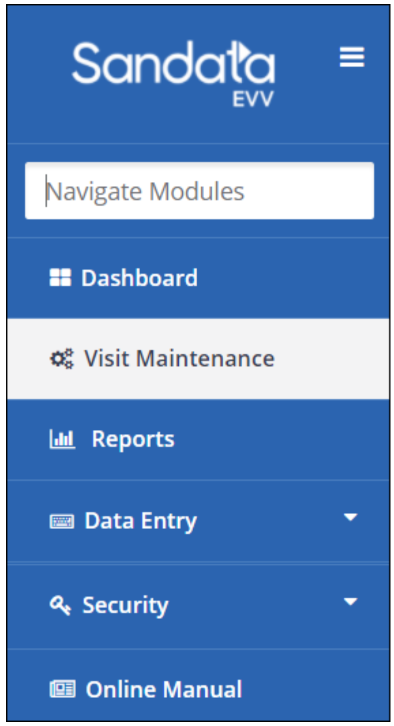
Highlighted ADA Functions

Navigate Modules

For accessibility, the **Navigate Modules** field allows users to move to the various screens of the applic-ation without using the Navigation Menu.

- Type the name of a screen into the **Navigate Modules** field to jump to that screen. A link to the screen displays below the field. Click the link to navigate directly to the page.

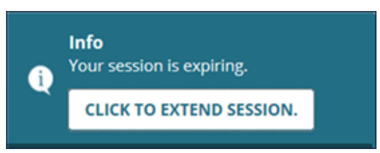
Note:
The **Navigate Modules** field requires users enter the name of the section they'd like to jump to exactly as it appears in the menu. For example, to jump directly to the Dashboard, users must enter "Dashboard" into the Navigate Modules field.



Navigate Modules Field

Automatic Log-Out Extension

For system security, users are automatically logged out of the system after a period of inactivity. When users remain idle for 15 minutes (default value) a warning message displays. For accessibility reasons, users have 2 additional minutes to respond to the prompt and extend the session. If users do not click the **CLICK TO EXTEND SESSION.** button, they are automatically logged out of the application.



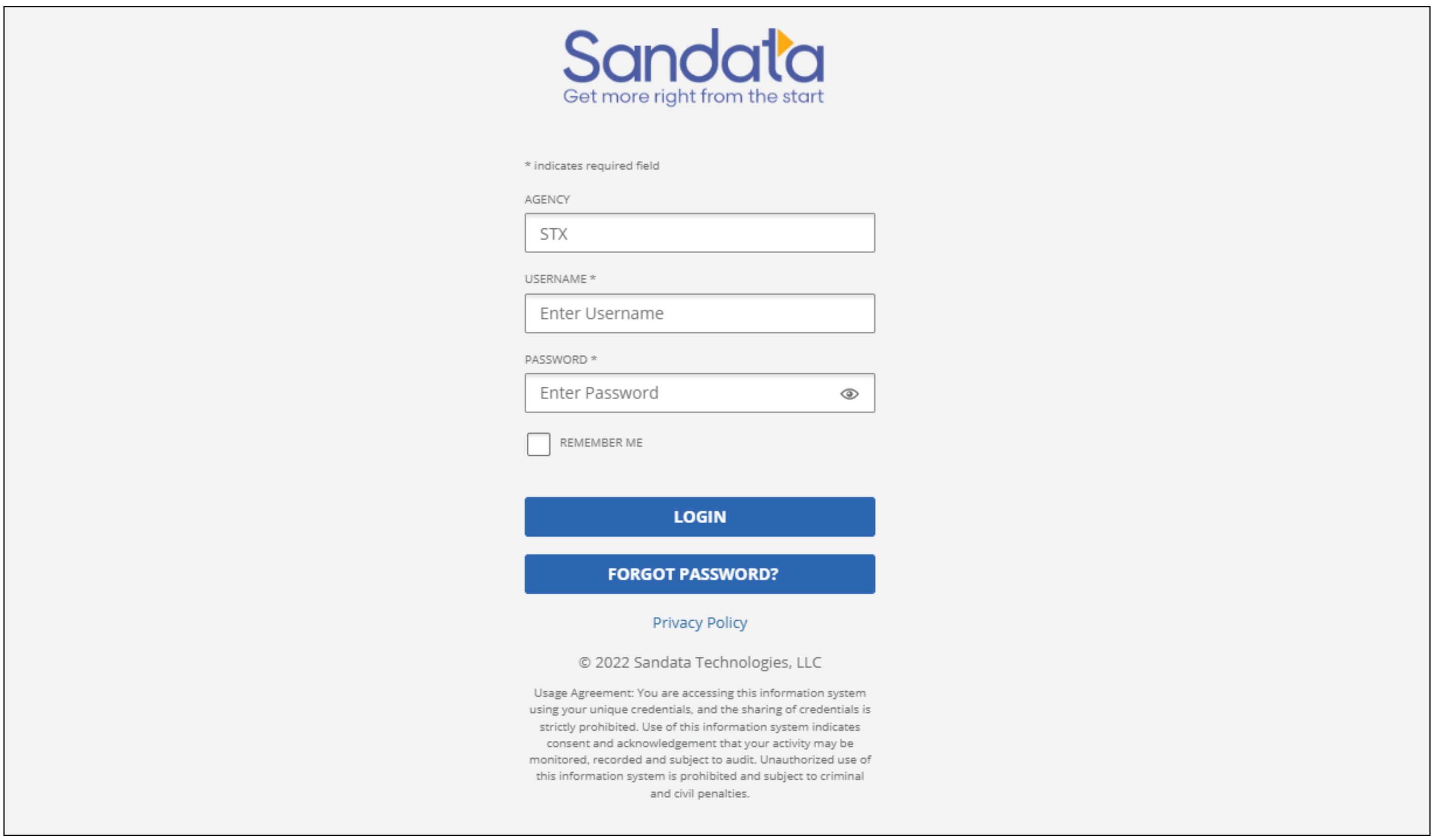
Session Expiring Warning

Log In Screen

Logging In to Sandata EVV

Users must log in using the following URL (https://evv.sandata.com). Users with multiple accounts only need to log into the system one time and can switch between associated accounts (as well as Aggregator accounts) using a drop-down menu in the application. On the login screen (displayed below) enter the credentials provided by the administrator and click **LOGIN** to access to the system:

• **AGENCY** -Enter the agency's Sandata assigned account number in this field. Account numbers are typically between 4 to 10 characters long and must be preceded by "STX" when logging into the application. Example: STX#### (#### = account number).
• **USERNAME** - The username is the email address used when creating a system user (username is not case sensitive). Users must have access to emails sent to this email address, as the emails containing temporary passwords are sent there.
• **PASSWORD** - Must be at least twelve characters long, have at least one upper case, one lower case letter, one numeric character and one special character (@#$%^) (Password are case sensitive). By default, the characters entered in this field are masked. Click the eye icon ( ) to unmask the characters in this field.
• **REMEMBER ME** - Select this checkbox to save the last **AGENCY** and **USERNAME** entered. This information is only saved to the computer and web browser the user clicked the **REMEMBER ME** checkbox on.



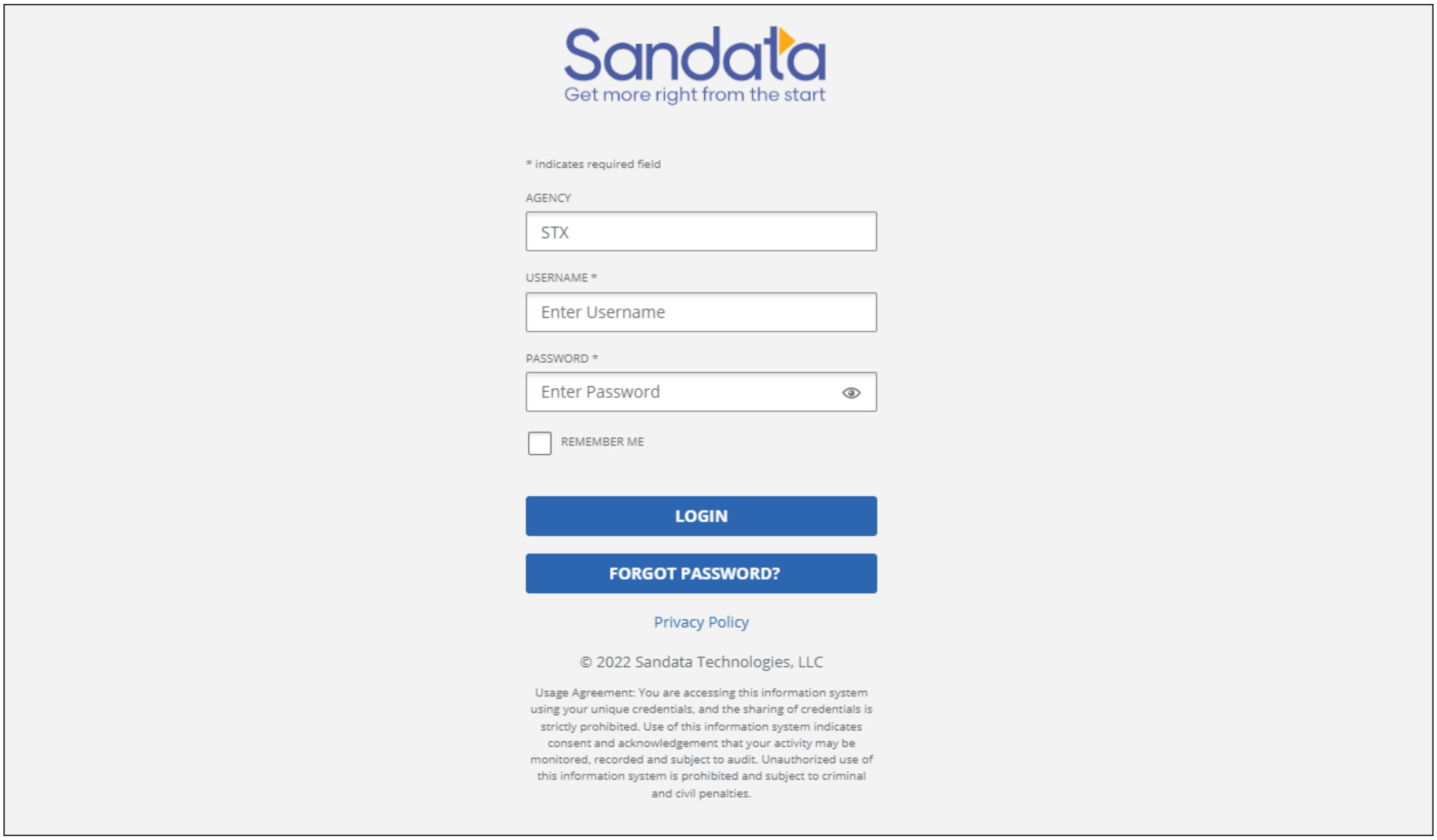
Login Screen

Note:
When using a browser that is no longer supported, a message reading “Sandata EVV no longer supports this browser” displays at the top of the login screen. If cookies are not enabled for the web browser, a message reading “Cookies Required Cookies are not enabled on your browser. Please enable cookies in your browser to continue”.

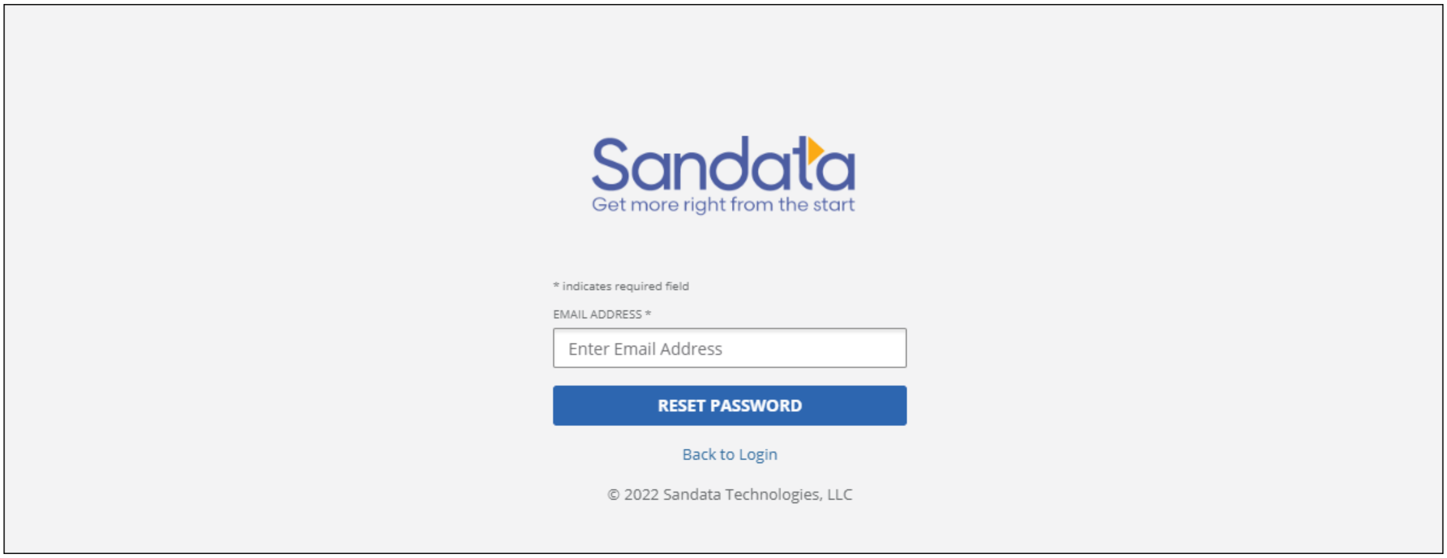
Resetting Password

Sandata EVV allows users to request a temporary password if necessary. After logging in using the temporary password, users are prompted to create a new permanent password. Passwords can only be reset once every 24 hours.

- **Forgot Password?** - Click on the **Forget Password** button and follow the prompts to send a reset password email to the email address used to log in.



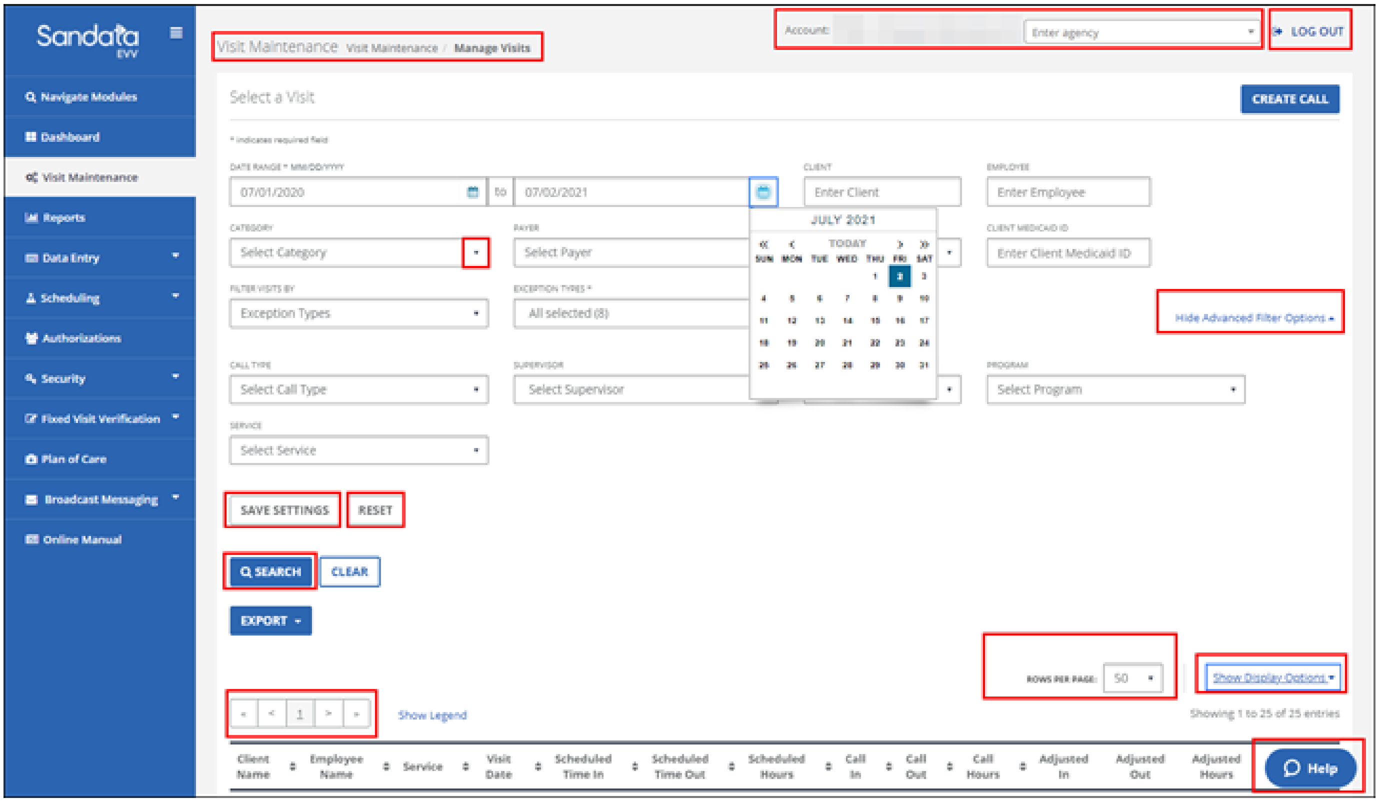
Sandata EVV Log In Screen - Forgot Password



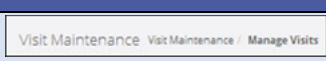
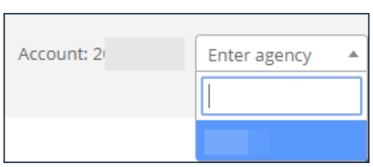
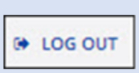
Reset Password

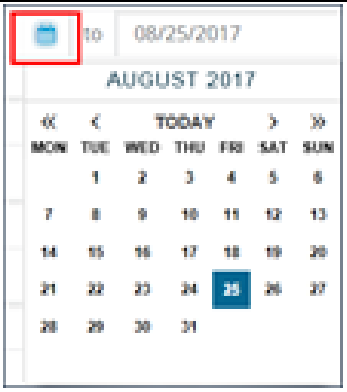
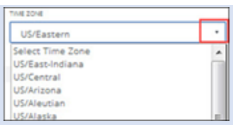
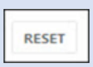
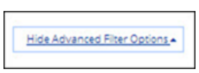
Common Functionality

This section describes common functions within Sandata EVV.



Manage Visits Screen

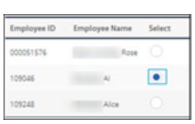
Item	Name	Description
	**Navigation Path**	Indicates which screen is displayed.
	**Account and User Display**	Displays the account number of the account the user is currently in and the username of the user logged into the application. Click the drop-down arrow to display a list of accounts the current user has access to. Users can switch to any account they have access to.
	**Log Out Button**	Click this button to log out of the application. After logging out, users are returned to the login screen.

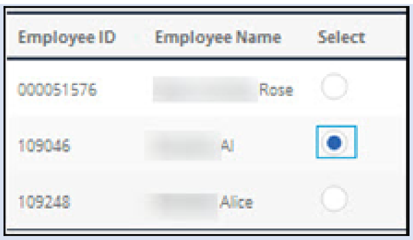
Item	Name	Description
	**Calendar Icon**	Click the calendar icon to display a calendar with selectable dates. Use the single arrows to move the date forward or back a month and double arrows to move the date forward or back a year. Users can also type dates in fields with the calendar icon.
	**Show List Icon**	Click this icon, located in drop-down fields, to display a list of options associated with the field.
	**Save Settings Button**	Click this button to save selected search fields. This button is visible when using the advanced filter settings.
	**Reset Button**	Click this button to clear any saved search settings. This button is visible when using the advanced filter settings.
	**Show/Hide Advanced Filter Options**	Click this link to show or hide additional filters. Hidden filters are still applied to search results if a value is entered in the field.
	**Search Button**	Click this button to execute a search.
	**Export**	Click the button to view all current results, limited based on the selected filters in an excel or CSV format. This functionality allows the export of all authorization data, which can be used in place of many authorization reports.

Item	Name	Description
« < 1 2 3 4 5 > »	**Page Listing**	Use these buttons to navigate the pages of a results list. The double arrows jump to the first/last page. Single arrows jump to the previous/next page. Click a number to navigate to the page.
CLEAR	**Clear Button**	Clear all data entered in search fields.
Show: 10 per page	**Number of Items per Page Setting**	Use this drop-down to select the number of records displayed on each page of the results list.
Showing 1 to 10 of 89 entries	**Results Summary**	Displays a summary of the number of records available in the results list.
	**List Sorting Icon**	Click a column header displaying this icon to sort the results in ascending/descending order based on that column's content.
	**Edit Button**	Opens an individual record with its fields in an editable state.

Additional Buttons and Icons

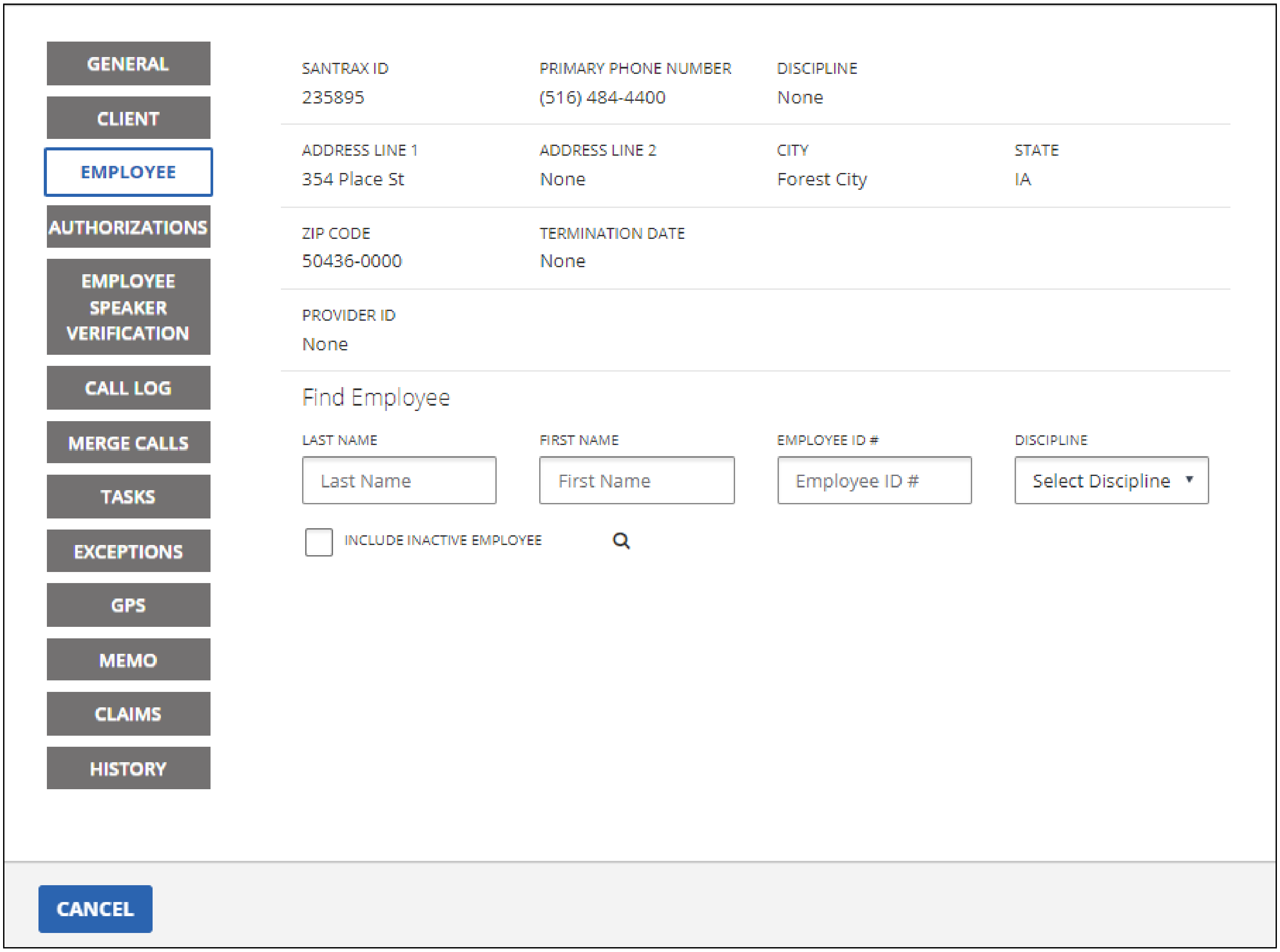
The following buttons are frequently displayed throughout the Sandata system:

Button	Function	Description
ADD	**Add Button**	Click this button to add another item to a list.
CANCEL	**Cancel Button**	Click this button to cancel an operation and close the screen.
	**Check Box**	Select a checkbox to enable a feature, deselect a checkbox to disable it.
	**Time Field**	Click this icon to select a time. Use each field's up or down arrow to increase or decrease the value and switch between AM or PM. Users can also enter times in these fields (Format: hh:mm AM/PM).

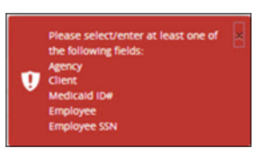
<table>
<tr><th>Button</th><th>Function</th><th>Description</th></tr>
<tr><td></td><td>Delete Button</td><td>Click this icon to move an item to “Inactive” status.
Note: It is best practice to only delete records when the Reactivate () functionality is available.
WARNING: Once moved to an inactive state, not all items can be reactivated. Items that cannot be reactivated are permanently deleted.</td></tr>
<tr><td>Finish</td><td>Finish Button</td><td>Click this button to complete a task.</td></tr>
<tr><td>
</td><td>Radio Button</td><td>Use radio buttons to select an item from a list.</td></tr>
<tr><td>REFRESH NOW</td><td>Refresh Button</td><td>Click this button to refresh the related fields.</td></tr>
<tr><td>SAVE</td><td>Save Button</td><td>Click this button to save the information that has been entered. Modifications are not saved unless the user clicks Save.</td></tr>
<tr><td></td><td>Show Information Icon</td><td>Click this icon to unmask masked characters entered in certain fields.</td></tr>
<tr><td></td><td>Reactivate Icon</td><td>Click this icon to reactivate the related record.</td></tr>
</table>

Confirmation and Error Messages

Confirmation and error messages are displayed at the top center of the screen when records are saved/updated.



Confirmation Message



Error Message

Assignment Buttons

These buttons display whenever a screen has settings that require moving items between **Available** and **Assigned** fields, for example when assigning user roles. Single or multiple items can be added or removed.

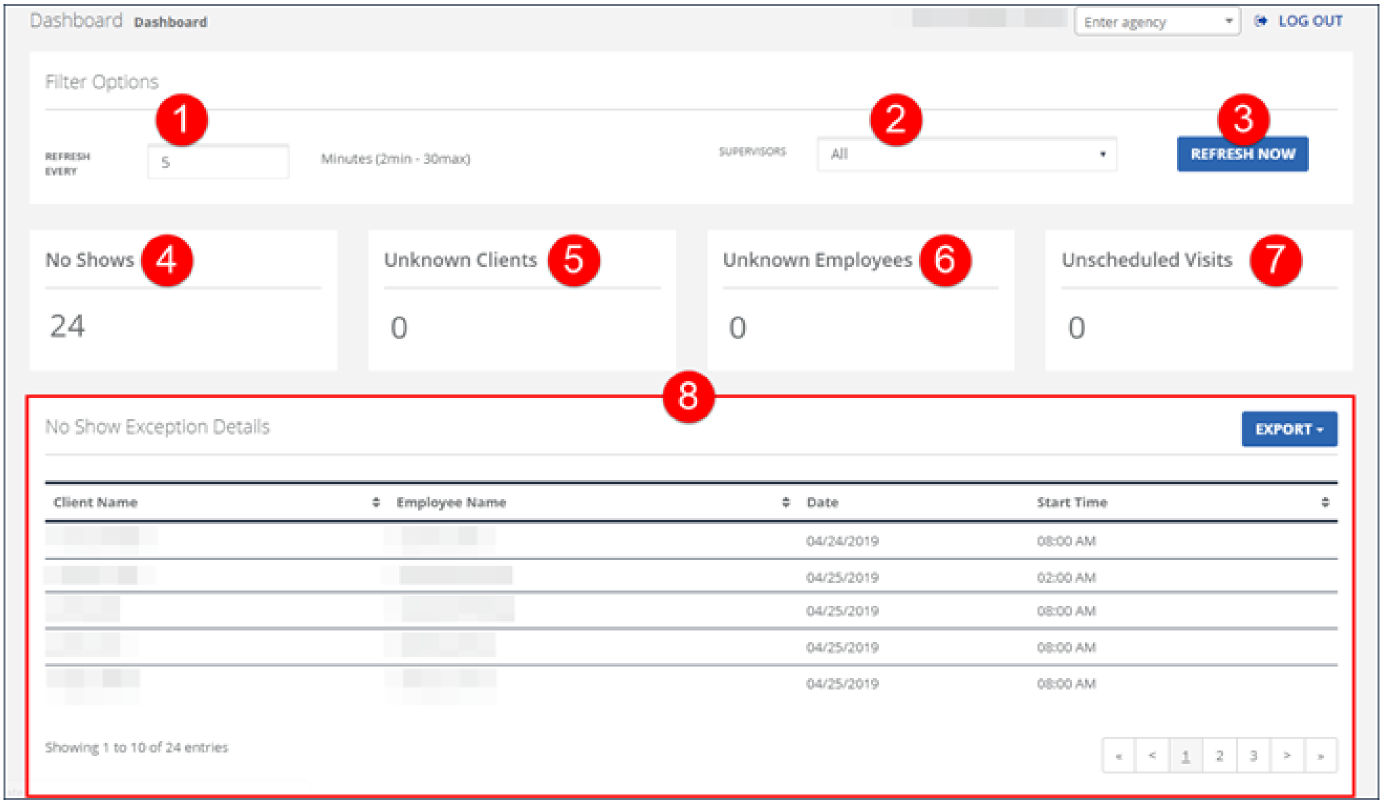
Button	Function	Description
»	**Add All**	Moves all items from the Available field to the Assigned fields.
›	**Add Item**	Moves single or multiple items from the Available field to the Assigned field. Click on multiple items to add them together, if necessary. • To select consecutive items, press and hold <Shift> and then select the first and last schedule. • To select multiple items not listed consecutively, press and hold <Ctrl> and then select the desired schedules.
‹	**Remove Item(s)**	Moves single or multiple items from the Assigned field to the Available field. Click on multiple items to add them together, if necessary.
«	**Remove All**	Moves all items from the Assigned field to the Available field.

Dashboard

The Sandata EVV Dashboard displays visit information for the current day using a series of tiles which are updated in near-real time. On this screen, users can view the number of visits with certain exception types to quickly identify which exceptions need attention.

With these tiles, users can easily view and manage certain exception types without the need to search for and filter results on the Visit Maintenance screen. For example, the No Shows tile allows for the monitoring of no shows throughout the day, allowing action to be taken to ensure visits are occurring as scheduled.

Over time, more tiles may be added to this screen. Certain tiles (example: No Show, Unscheduled Visits) are tied to specific functionality and are only included on the Dashboard if that functionality is enabled.



Dashboard Screen

Dashboard Filter Options

#	Filter	Description
1	REFRESH EVERY	Use this field to set the refresh rate. The refresh rate can be set to anywhere between 2 and 30 minutes by entering the desired value in the **Refresh Every** field. The default is 5 minutes. Information displayed on the dashboard is updated based on the last time the data was refreshed.
2	SUPERVISORS	When configured, this field allows the user to view the dash-board information for clients associated with the selected supervisor.
3	REFRESH NOW	Click this button to update the data displayed.

Alert Tiles

The number displayed for each alert is the total number of visits flagged with the related exception for the current day. Each tile represents an exception type and the number within the tile indicates the number of visits flagged with that exception. Visits with more than one exception can be counted on multiple tiles. Clicking on the title brings the user to the Visit Maintenance screen and automatically sets the filters to display only visits flagged with the selected exception. Click the number within the tile to view a list of visits flagged with that exception, sorted by date and time, with the most recent visit appearing at the top of the list.

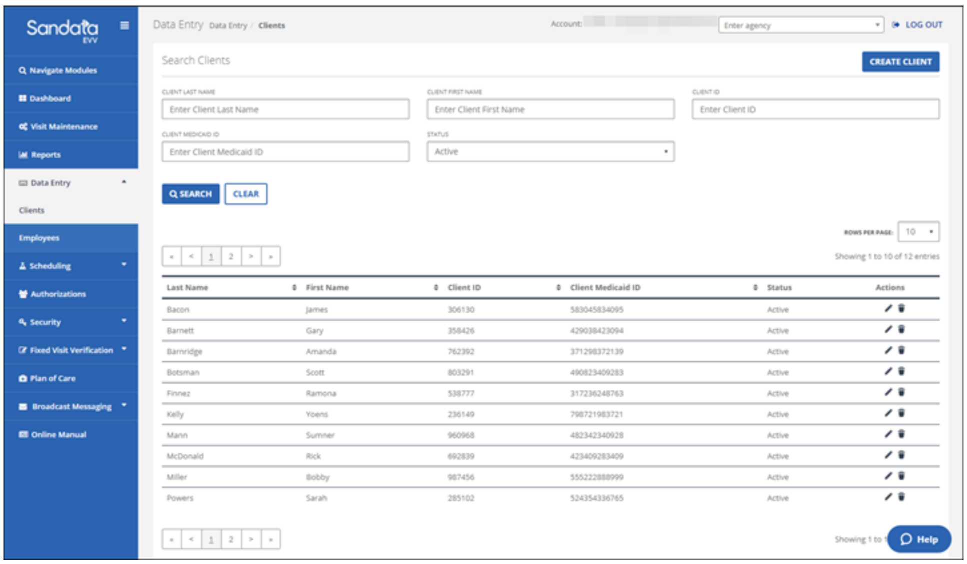
#	Filter	Description
4	**No Shows**	This indicates there are visits in the system that were not started at the scheduled start time.
5	**Unknown Clients**	This tile indicates the number of visits that do not have a client associated with them.
6	**Unknown Employees**	This indicates the number of visits that do not have an employee associated with them.
7	**Unscheduled Visits**	Indicates there are visits in the system that do not have a schedule associated with them.
8	**Exception Details**	Displays a list of all visits flagged in the selected exception.

Data Entry

The Data Entry section allows users to manually enter client/employee data when it is not provided by an interface. This section details how to use the data entry module to manually input and maintain both clients and employees. If clients are provided by a payer feed, based on program rules, users can use this section to enter certain data (For example: alternate addresses and phone numbers). Depending on program rules, some fields may not be available to edit.

Clients Screen

Use the Clients screen to search for clients. The various fields and filters allow users to limit the results to find specific clients. From this screen users can also create a new client or view and edit an existing client.



Filters and Buttons on the Clients Screen

<u>Filters and Buttons on the Clients Screen</u>

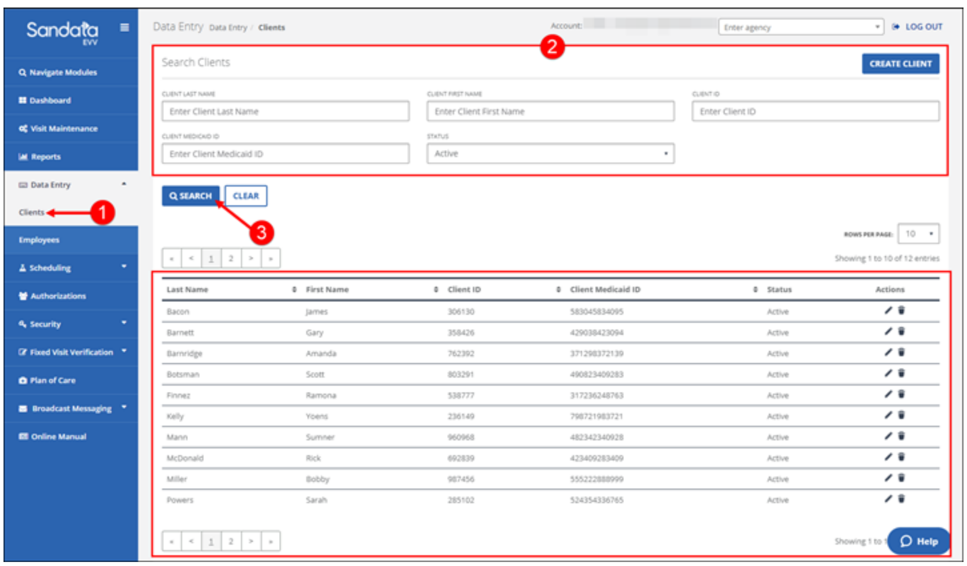
Field	Description
CREATE CLIENT	Click this button to create new client profile with associated demographic information.
CLIENT LAST NAME	Use this field to search for clients based on last name.
CLIENT FIRST NAME	Use this field to search for clients based on first name.
CLIENT ID	Use this field to search for a single client based on the assigned client's ID. **NOTE:** Client ID is always numeric and may be provided by a third party or assigned by Sandata.
CLIENT MEDICAID ID	Use this field to search for a single client based on the client's Medicaid ID.

Field	Description
STATUS	Use this field to limit the results to only those clients with the selected status. The default value in this field is "Active."
RESULTS LIST	Displays a list of clients that match the selected search criteria.

Searching for a Client

1. Navigate to the Clients screen. (**Data Entry > Clients**)
2. Enter the search criteria.
3. Click **SEARCH**.

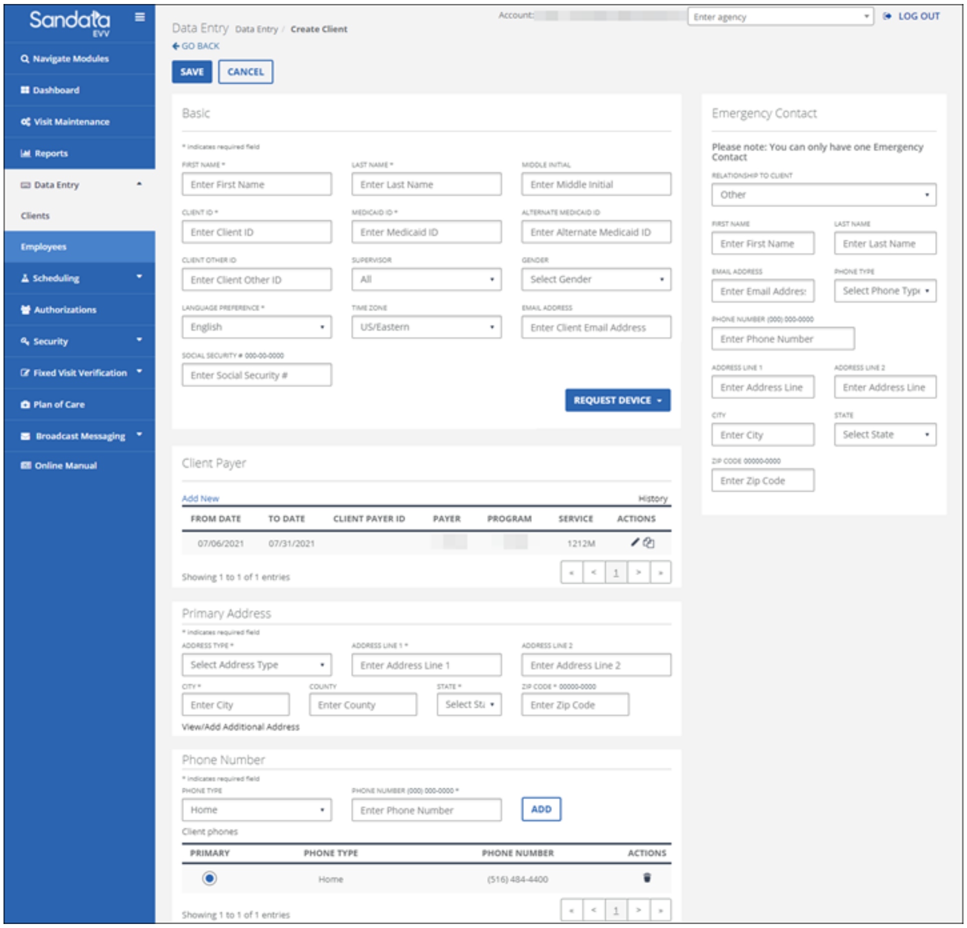
	Note: Searching with no criteria selected displays a complete list of clients.



Clients Screen

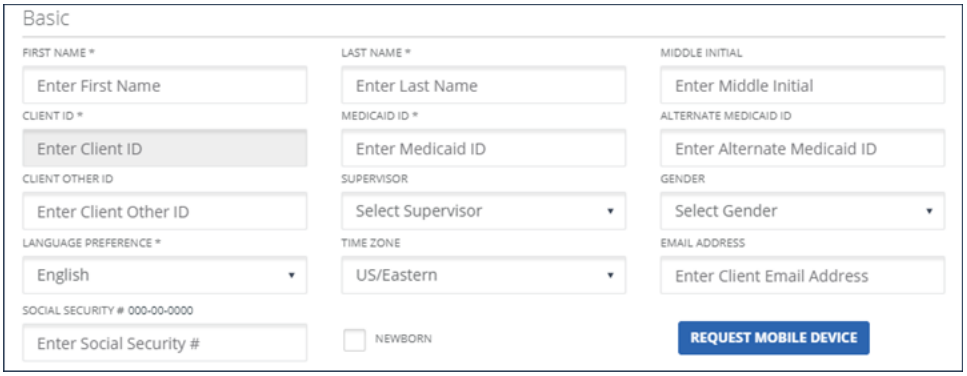
Create Client Screen

The Create Client screen allows users to enter and save client information. If the client is provided by a payer feed, based on program rules, users can enter alternated addresses and/or phone numbers for the client. Clients are checked for uniqueness based on configuration (For example, a unique client profile may be determined by the Medicaid ID or Social Security Number).



Create Client Screen

Basic Section Fields and Buttons



Basic Section

Field	Description
TIME ZONE	Select the client's time zone.
SUPERVISOR	Select and assign the client's supervisor.
SOCIAL SECURITY #	Enter the client's Social Security Number. Program rules determine whether a full or partial Social Security Number must be entered in this field.
PAYER	Select the client's payer. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list. For accounts configured to use multiple payers, this field is replaced by the Client Payer section.
NEWBORN	Select this checkbox to indicate the client is a newborn and does not have a Medicaid ID. Selecting this checkbox dis-ables entry into the Medicaid ID field, it must be deselected to enter a Medicaid ID.
MIDDLE INITIAL	Enter the client's middle initial.
MEDICAID ID	Enter the client's Medicaid ID.
LAST NAME	Enter the client's last name.
LANGUAGE PREFERENCE	Select the client's preferred language. Language selection options are based on configuration.
GENDER	Select the client's gender.
FIRST NAME	Enter the client's first name.
CLIENT OTHER ID	Use this field to note ID numbers used in previous systems or cross-reference IDs used in current applications.

Field	Description
CLIENT ID	A manually entered or automatically assigned numeric identifier, depending on configuration. When manually entering a client ID, it is best practice to use a value of at least six digits. The length of the client ID should be consistent for a given account (For example: all client IDs in Account A are 6 digits in length).
ALTERNATE MEDICAID ID	Enter an alternate Medicaid ID. This value can be used for claims validation if a client's Medicaid ID changes.

Emergency Contact Section Fields and Buttons

Emergency Contact

Field	Description
STATE	Select the state from the emergency contact's address.
PHONE TYPE	Select the category that describes the phone number.
RELATIONSHIP TO CLIENT	Select the category that describes the contact's connection to the client.
ZIP CODE	Enter the zip from the emergency contact's address.
PHONE NUMBER	Enter the emergency contact's phone number.
LAST NAME	Enter the emergency contact's last name.
FIRST NAME	Enter the emergency contact's first name.
EMAIL ADDRESS	Enter the emergency contact's email address. This is required if the member portal is in use and the emergency contact is the designee for member portal use.

Field	Description
ADDRESS LINE 2	Enter the emergency contact's apartment/suite number, if applicable.
ADDRESS LINE 1	Enter the emergency contact's address.
CITY	Enter the city from the emergency contact's address.
STATE	Select the state from the emergency contact’s address.
ZIP CODE	Enter the zip from the emergency contact’s address.

Client Payer Section Fields and Buttons

When an account is configured to use multiple payers and a payer authorization is not provided, this information may be required to associate the client with the appropriate payers, programs and services.

Client Payer section

Field/Button/Column	Description
ADD NEW	Click this button to add a new payer.
FROM DATE	Displays the start date of the payer.
TO DATE	Displays the date the payer/program/service ends.
CLIENT PAYER ID	Displays the client payer ID.
PAYER	Displays the payer's name. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
PROGRAM	Displays the program. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
SERVICE	Displays the service (code). All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
ACTIONS: EDIT PAYER ()	Click this button to edit an existing payer, program and service combination.

Field/Button/Column	Description
ACTIONS: COPY PAYER ( )	Click this button to copy an existing payer, program and service combination. At least one value must be updated before the copied payer can be saved.

Primary Address Section Fields and Buttons

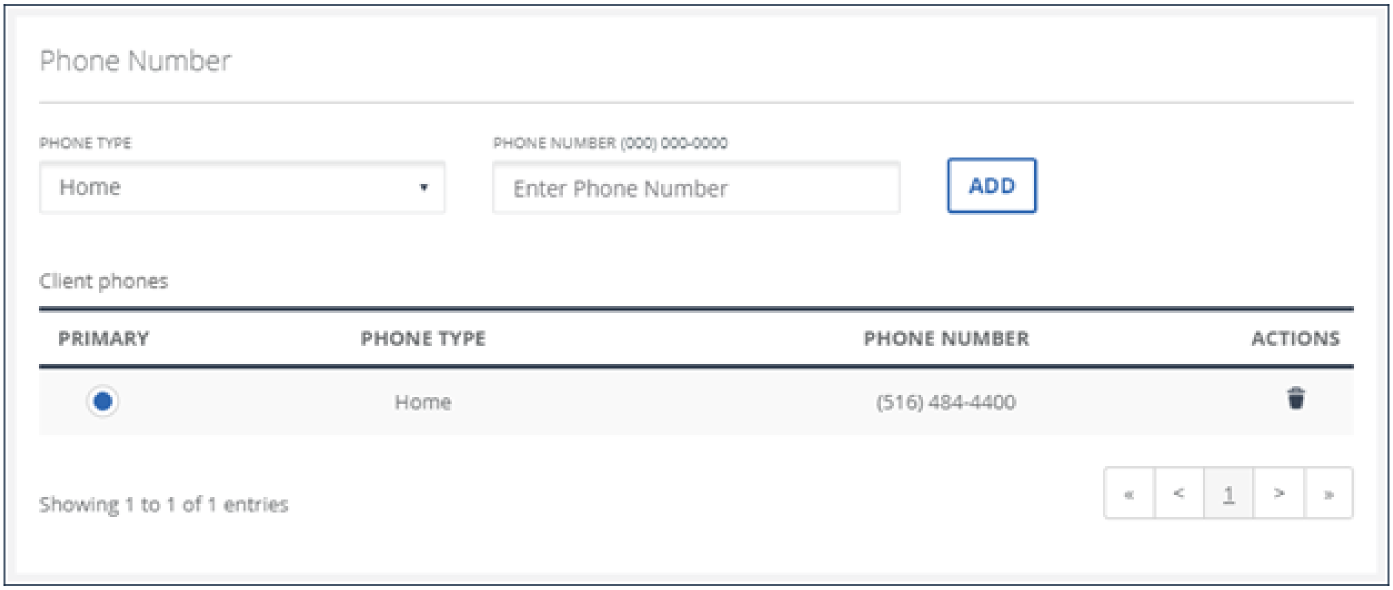
Use this section to enter all addresses for locations where the client may receive services. Any address provided using a data feed is considered the client's primary address. Latitude and longitude coordinates are calculated for each address entered and are used to confirm call location. Latitude and longitude authentication may take up to 2 hours. When calls are placed using mobile visit verification, all addresses entered and linked with a valid latitude and longitude are used for GPS validation (GPS Validation ensures a valid address was entered and retrieves GPS coordinates for that address). It is not always possible to determine latitude and longitude (For Example, P.O. Box addresses).

Primary Address section

Field/Button/Column	Description
ADDRESS TYPE	Select the category of this address (school, home etc).
ZIP CODE	Enter the zip code from the client's primary address.
STATE	Enter the state from the client's primary address.
ADDRESS LINE 1	Enter the client's primary address.
ADDRESS LINE 2	Enter the client's apartment/suite number, if applicable.
CITY	Enter the city from the client's primary address.
View/Add Additional Addresses	Click this link to display a pop-up to enter/view a list of additional addresses. An Address Type field identifies the various addresses.

Phone Number Section Fields and Buttons

Use this section to enter all phone numbers for locations where the client may receive services. Any phone number provided using a data feed is considered the client's primary address.



Phone Number section

Field/Button/Column	Description
PRIMARY	Select this to indicate the main phone number. One phone number must have this setting selected. When calls are placed using EVV, all phone numbers entered with are used for validation.
PHONE TYPE	Select the category that describes the phone number.
PHONE NUMBER	Enter the client's phone number (Format: (###) ###-####).
CLIENT PHONES	Displays all phone numbers added to the client's profile.
ACTIONS: DELETE ( )	Click this icon to delete the client's phone number from their profile.

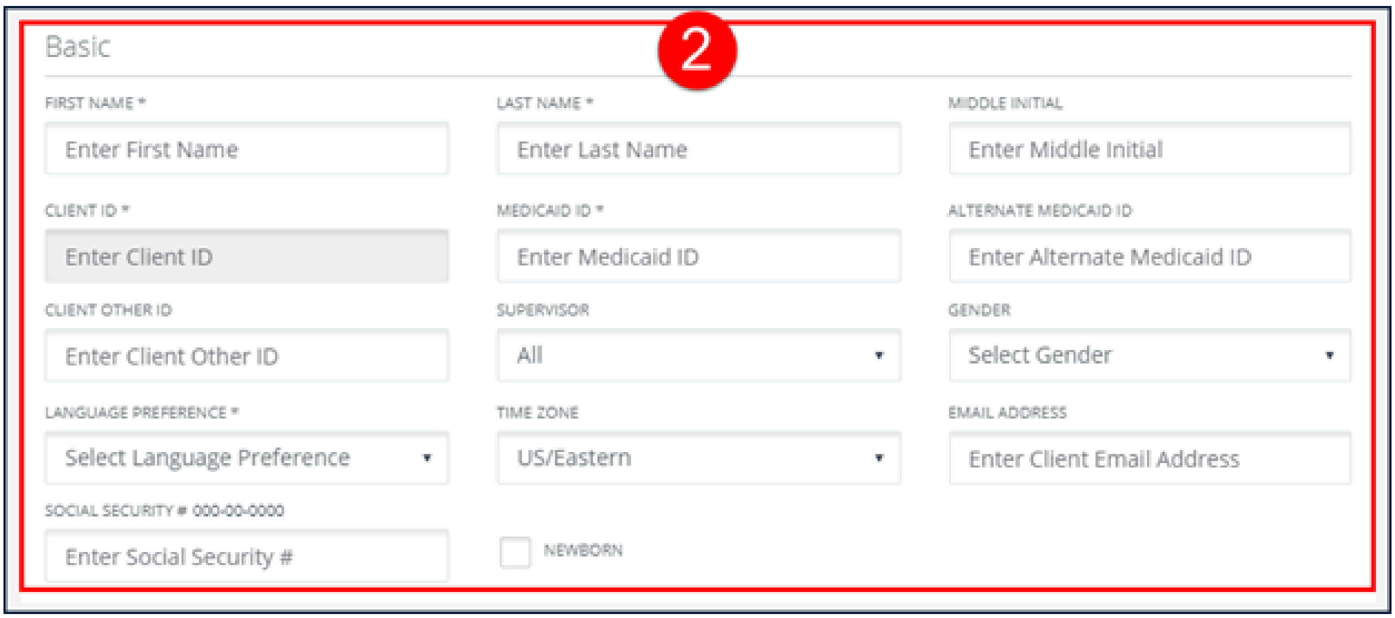
Creating a New Client Profile

1. Click the **CREATE CLIENT** button to open the Create Client screen. (**Data Entry > Clients > Create Client**)

Create Client

2. Enter all applicable information in the Basic section.
This section is used for all general identifying client information.
Required fields are indicated by an asterisk (*) and can change based on configuration. At a minimum all required fields must be filled in. When available, click **ADD** to insert the related fields into the table.

Note:
To prevent duplicate client profiles, search to ensure there is not an existing profile before creating a new client profile. Duplicate client entry is prevented based on the Client ID and/or Medicaid ID.



Basic Section

3. Use the Client Payer section to add a payer, program and service, if required.
This section is only available if the account is configured to display it. The Client Payer section allows users to enter multiple payers, programs and services for a client. Use the **CLIENT PAYER ID** field to create an identifier for that payer. This section allows users to define which services are available for a client. Use the **CLIENT PAYER ID** field to create an identifier for that payer. This section allows users to define which services are available for a client. **START DATES** and **END DATES** for services/payers/programs are also set on this screen. When applying the 'Invalid Service' exception, the system checks the parameters defined in this section of the application to determine which visits should be flagged with the exception.

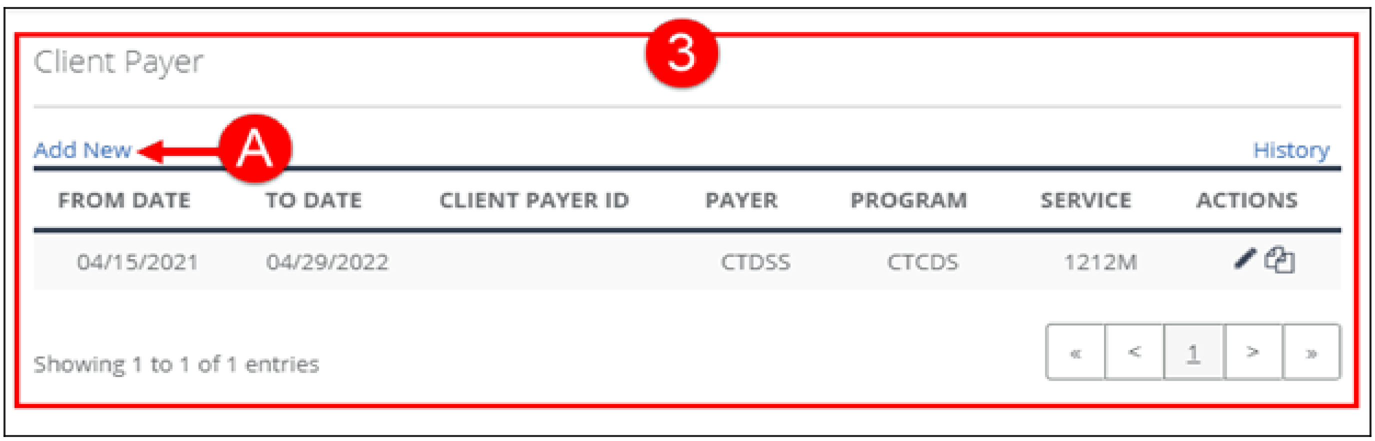
A. Click Add New to open the Add/Edit Payer screen.

B. Enter all applicable fields.

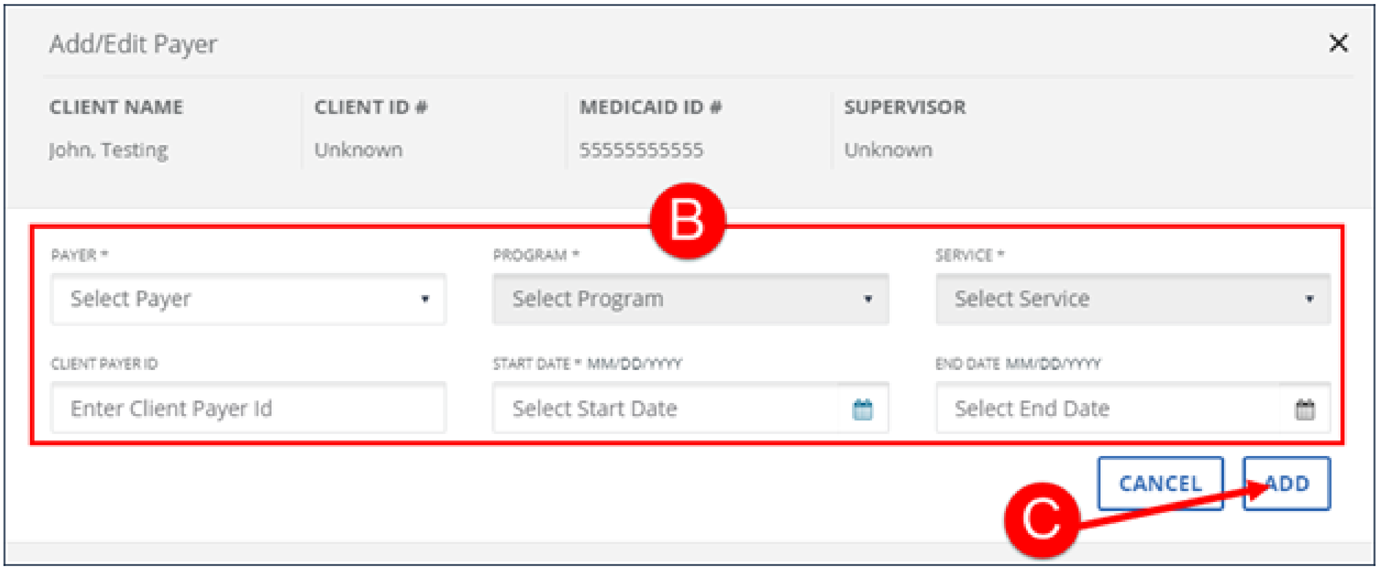
C. Click **ADD**.

Note:

Use the Copy Payer () button to copy an existing payer. Click the button to open the Add/Edit payer screen, pre-filled with identical information to the payer being copied. Make any changes and add the payer.



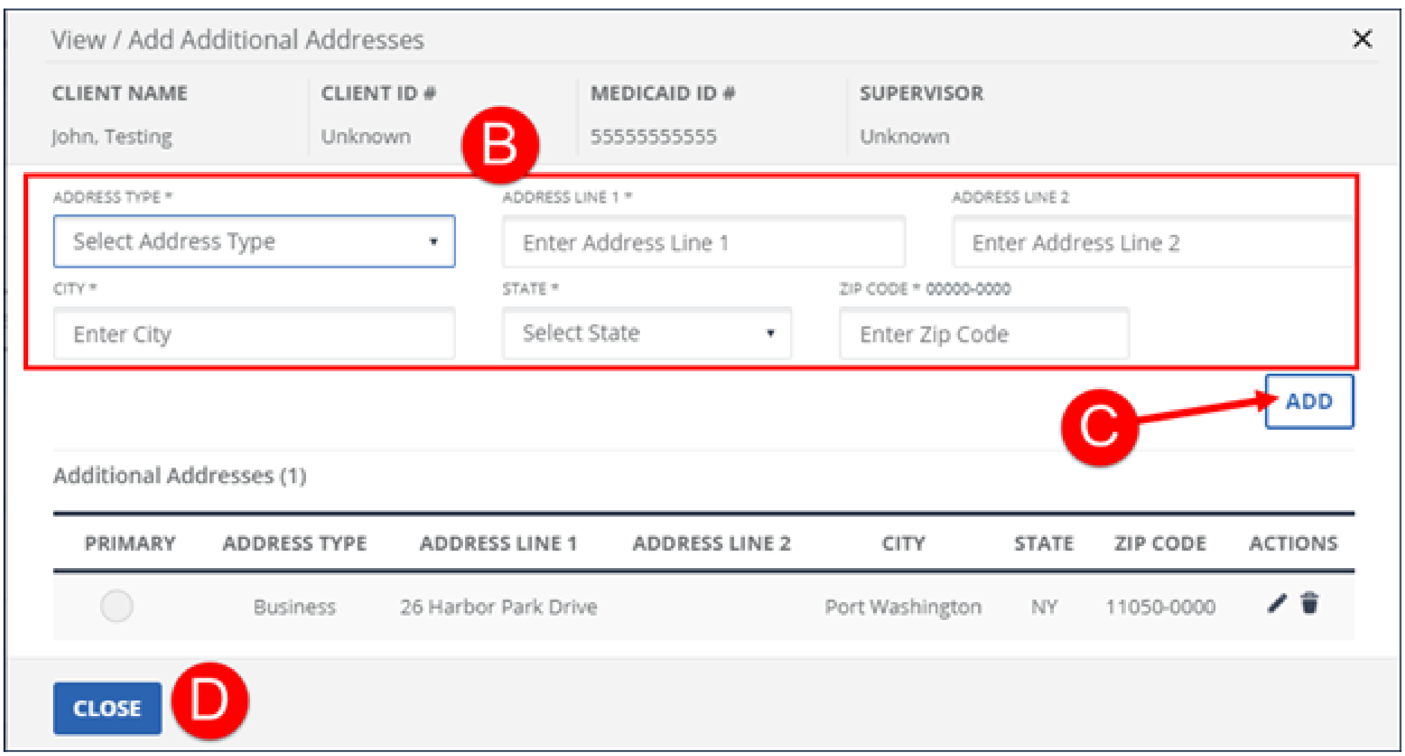
Client Payer Section



Add/Edit Payer

4. Enter/Select all applicable fields in the Primary Address section.
   A. Click **View/Add Additional Address**.
   B. Enter/Select all applicable fields in the View / Add Additional Addresses screen.
   C. Click **ADD** and the additional address displays in the Additional Addresses (x) section.
   D. Click **CLOSE.**

Primary Address Section

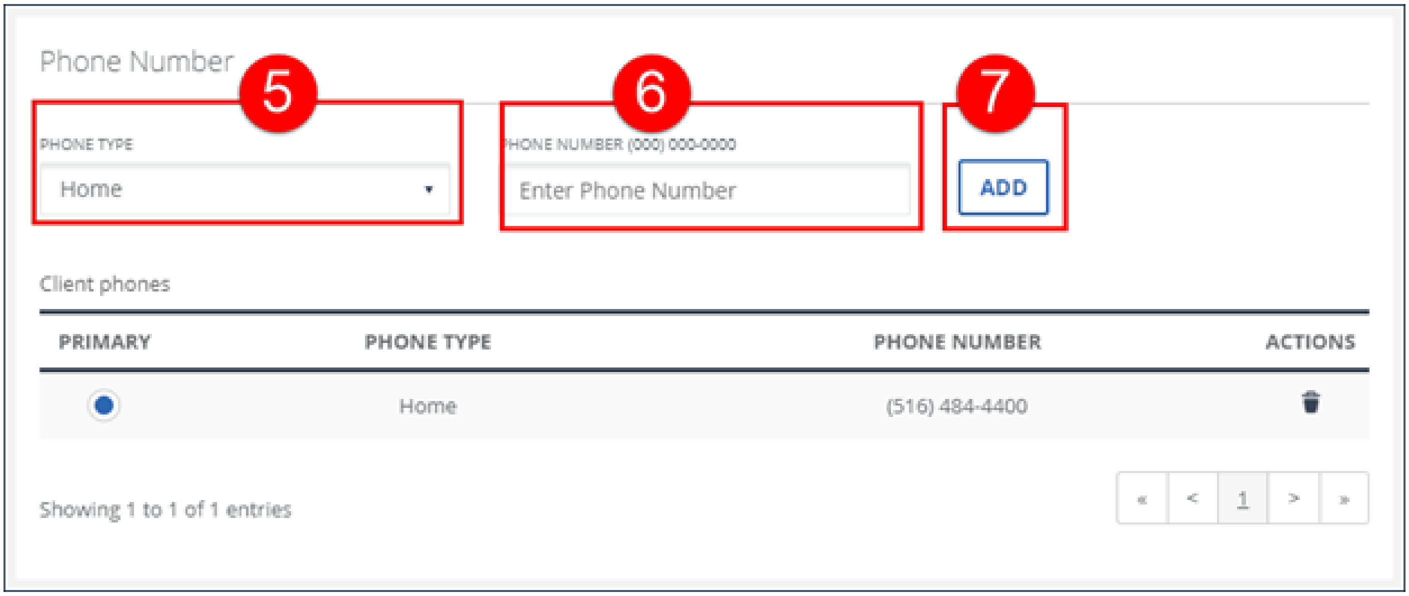


View / Add Additional Addresses Section

5. Select a **PHONE TYPE**.

6. Enter a phone number.

7. Click **ADD** and the phone number displays in the Client phones section.
Phone numbers are used to determine which visits are flagged with certain exceptions (For Example: Invalid Client, Unmatched Client ID, all exceptions related to phone numbers).

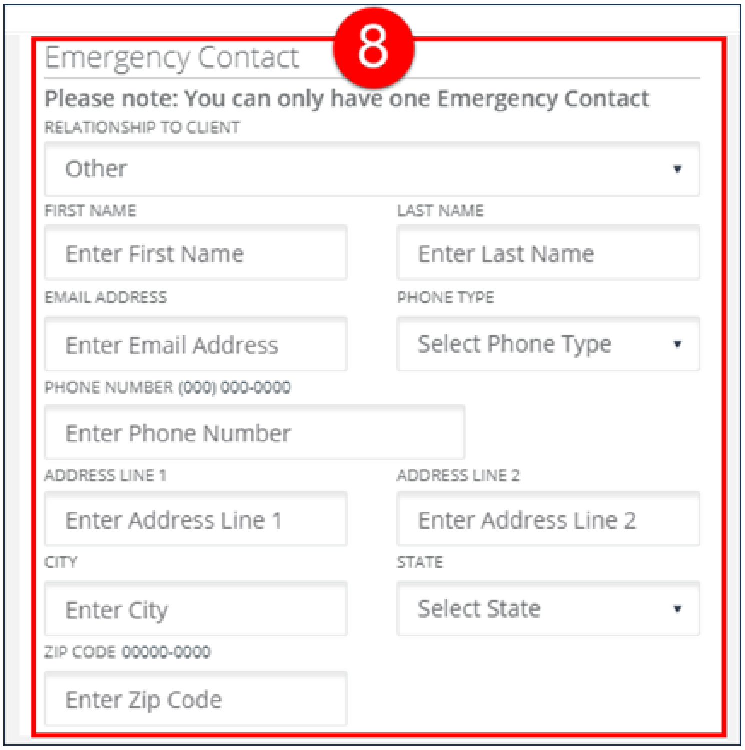


Phone Number

Note:
The first phone number added is set as the client's primary phone number. If the client has multiple phone numbers, select the radio button in the **PRIMARY** column to set that number as primary.

Note:
If data is provided by a payer, the primary phone number is not editable and can only be updated by the payer.

8. Enter all applicable fields in the Emergency Contact section.
An emergency contact is the designated contact person and/or signer for the client. Emergency contacts are also able to provide visit verification on both SMC and TVV visits. Emergency contacts can also log into portal, in place of the client, in certain configurations such as consumer directed services.

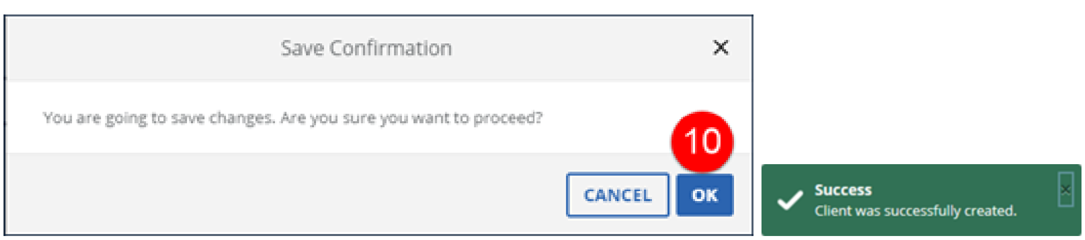


Emergency Contact Section

9. Click **SAVE**.

Save Button

10. Click **OK** on the **Save Confirmation** popup.
A notification of confirmation or error displays at the top of the screen. After creating a client, the newly created client profile displays, allowing users to review the information and immediately make updates.



Save Confirmation and Confirmation/Error Notification

Note:
After saving a client profile, the Edit Client screen displays. If configured, users can now use the **REQUEST MOBILE DEVICE** button to requiest a mobile visit verification device for the client.

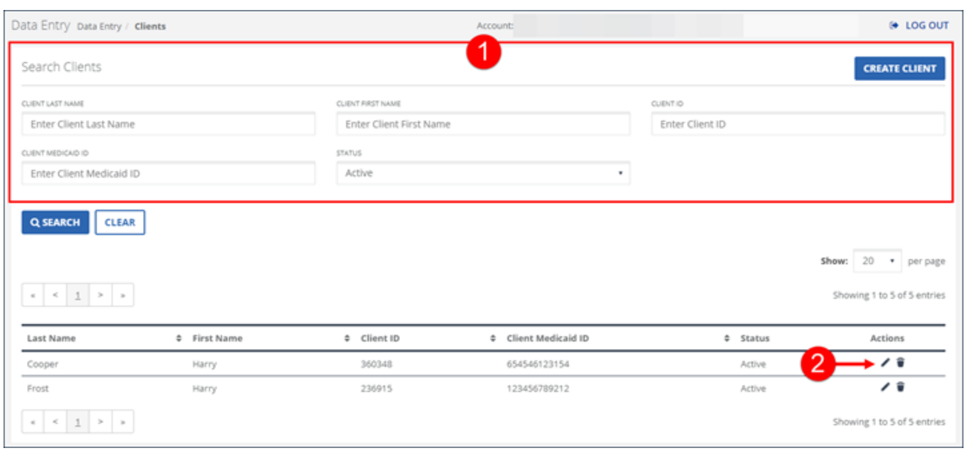
Note:
Use the **CREATE CLIENT** button at the top of the Edit Client screen to create clients consecutively without returning to the Clients screen.

Modifying a Client Profile

Use the Edit Client screen to update a client profile. Addresses, phone numbers, contacts, designees and payers can be updated on this screen. Depending on program rules, some fields may not be available for editing. Users can also request a mobile visit verification device, if allowed by program rules, from this screen.

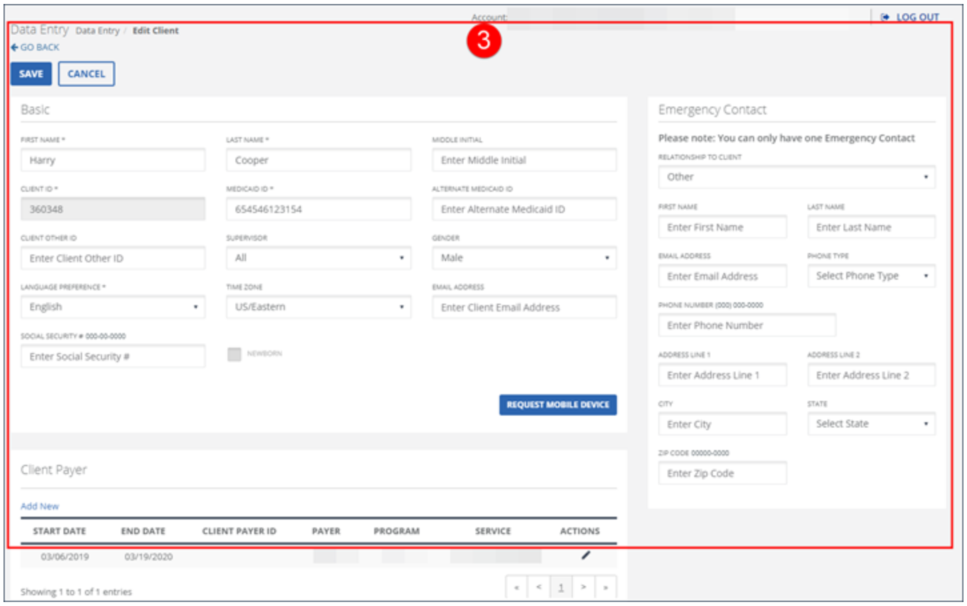
Note:
Addresses must be valid for the system to verify the entered address against the location the call was placed from. Addresses cannot be a PO Box.

1. Navigate to the Edit Client screen. (**Data Entry > Clients**)
2. Click the Edit icon (✎) for the client or anywhere on the line item to open the client's profile.



Clients Screen

3. Modify all applicable fields in the Basic, Primary Address, Client Payer, Phone Number and Emergency Contact sections of the Edit Client screen.
Required fields are indicated by an asterisk (*) and vary based on configuration. At a minimum all required fields must be filled in. When available, click **ADD** to insert the related fields into the table.

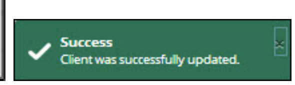


Create Client Screen

4. Click **SAVE**.

Save Button

5. Click **OK** on the **Save Confirmation** popup.
A notification of confirmation or error displays at the top of the screen.

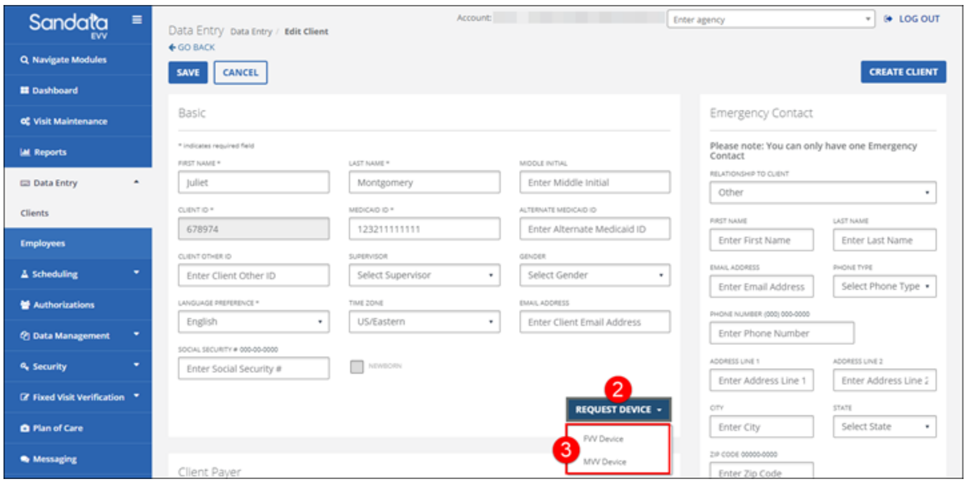


Save Confirmation and Confirmation/Error Notification

Requesting a Mobile or Fixed Visit Verification Device

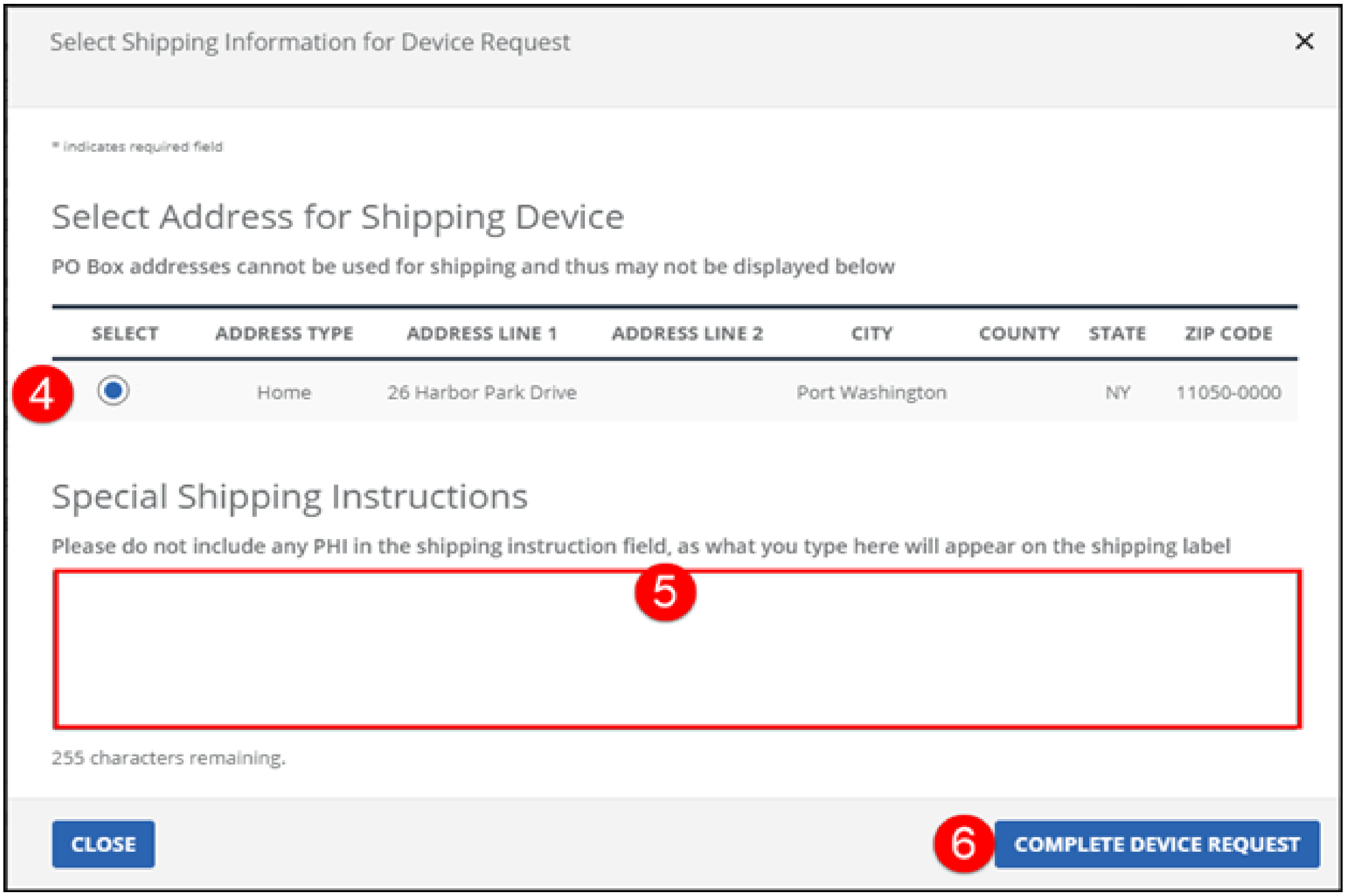
If program rules allow and Sandata is providing mobile and/or fixed visit verification devices, users, typically administrators, can click the **REQUEST DEVICE** button on the Edit Client screen and request a mobile or fixed visit verification device for the selected client. Follow the instructions below to order a device.

1. Navigate to the Edit Client screen (**Data Entry** > **Clients** >Search for a open Client).
2. Click the **REQUEST MOBILE DEVICE** button.
Depending on the privileges assigned to the user, this button is used to request a mobile device or an FVV device. If a user has both privileges assigned, they can select either MVV or FVV device.



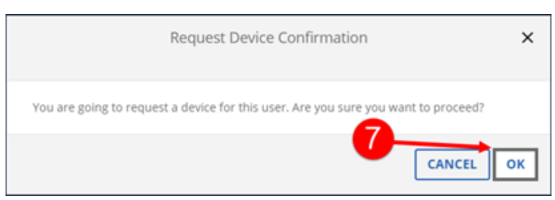
Request Device Button on Edit Client Screen

3. Select either **FVV DEVICE** or **MVV DEVICE**.
4. Select an address to the ship the device to.
5. Enter any special shipping instructions, if necessary.
6. Click the **COMPLETE DEVICE REQUEST** button.



Select Shipping Information for Device Request

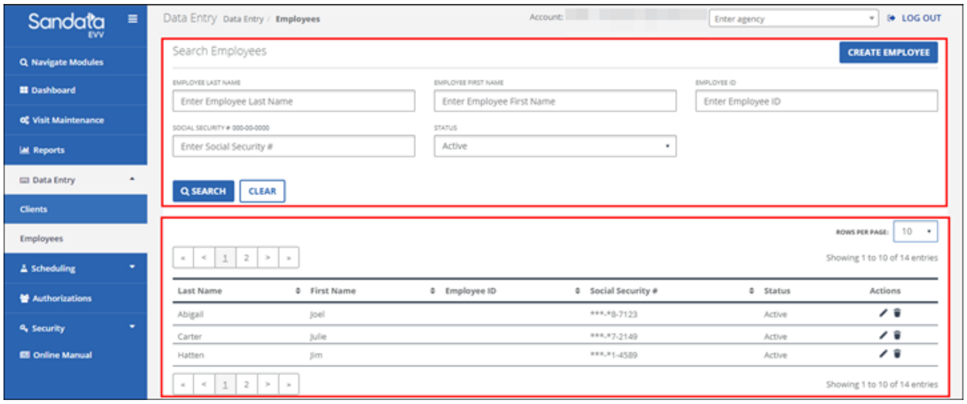
7. Click **OK** on the Request Mobile Device Confirmation pop-up.
The device request is submitted to the Sandata fulfillment center.



Request Mobile Device Confirmation

Employees Screen

Use the Employees screen to search for employees. The various fields and filters allow users to limit the results to find specific employees.



Filters and Buttons on the Employees screen

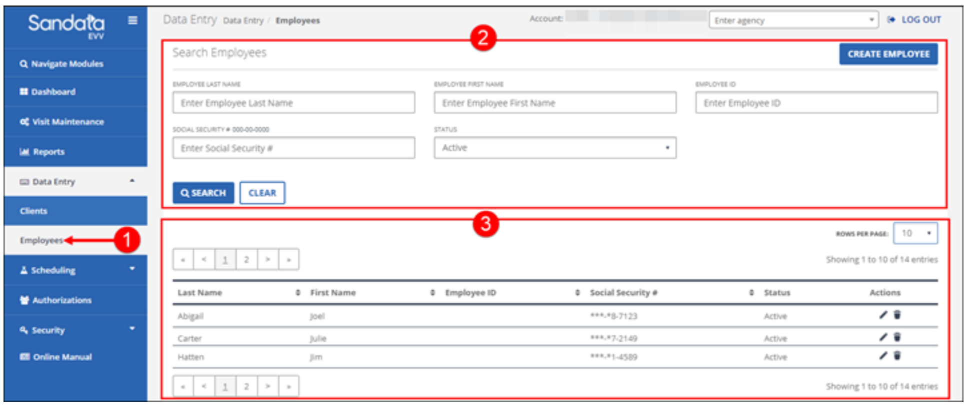
<u>Fields and Buttons on the Employees Screen</u>

Field	Description
STATUS	Use this field to search for employees based on status.
EMPLOYEE LAST NAME	Use this field to search for employees based on last name.
EMPLOYEE FIRST NAME	Use this field to search for employees based on first name.
SOCIAL SECURITY #	Use this field to search for employees based on a Social Security Number.
EMPLOYEE ID	Use this field to enter and search for a single employee’s ID.
CREATE EMPLOYEE	Use this button to create a new employee.
RESULTS LIST	Displays a list of employees that match the selected search criteria.

Searching for an Employee

1. Navigate to the Employees screen. (**Data Entry** > **Employees**)
2. Enter the search criteria.
3. Click **SEARCH**.

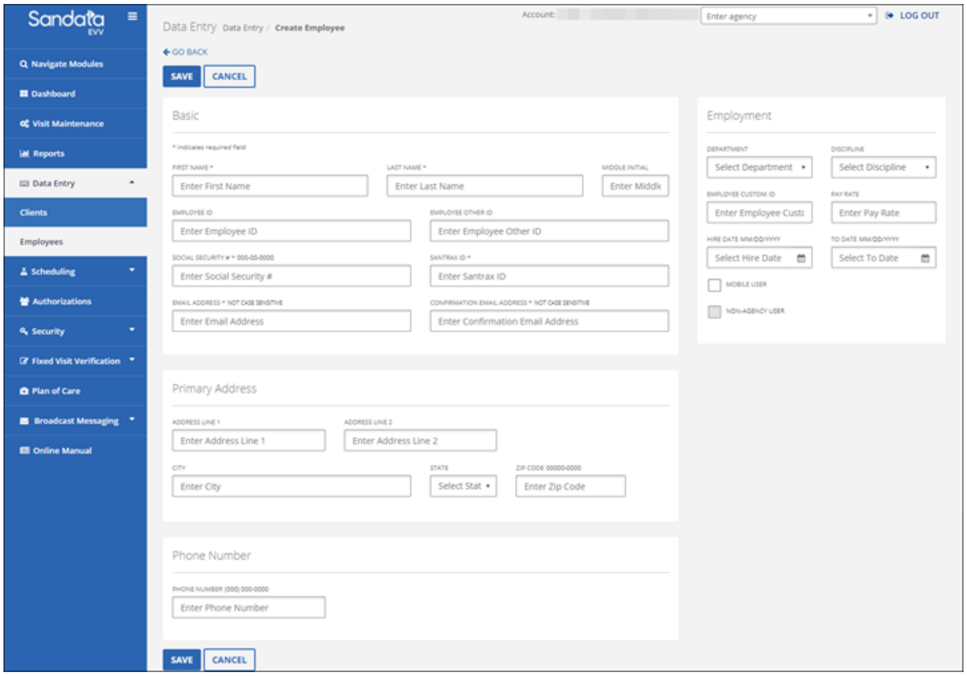
Note:
Searching with no criteria selected displays a complete list of employees.



Employee Screen

Create Employee Screen

The Create Employee screen allows users to add new employees to the system. Entering employee information allows the system to associate visit information with the appropriate employee. Employee data is used when determining which visits are flagged with certain employee related exceptions, such as 'Unknown Employee'.

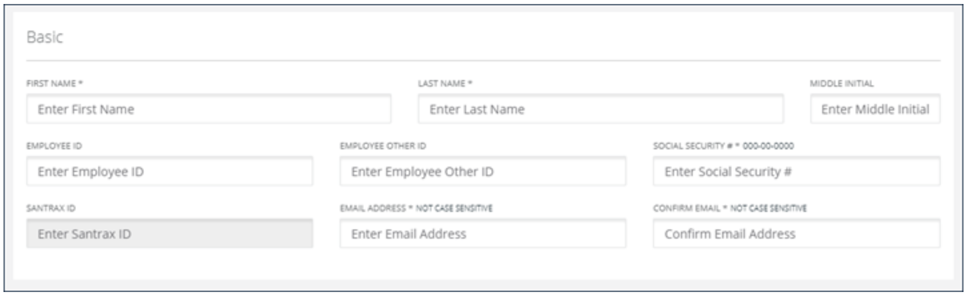


Fields and Buttons on the Create Employee Screen

Fields and Buttons on the Create Employee Screen

This section describes the various fields and buttons on the Create Employee screen.

Basic Section Fields and Buttons



Basic Section

Basic Section Fields and Buttons

Field/Button/Column	Description
FIRST NAME	Enter the employee’s first name.
LAST NAME	Enter the employee’s last name.
MIDDLE INITIAL	Enter the employee’s middle initial.
EMPLOYEE ID	Use this field to note ID numbers used in previous systems or cross-reference IDs used in current applications.
OTHER EMPLOYEE ID	Use this field to note ID numbers used in previous systems or cross-reference IDs used in current applications.
SOCIAL SECURITY #	Enter the employee’s Social Security Number. For accounts configured to require less than 9 digits for this field, the value is not validated for uniqueness against other employee social security numbers.
SANTRAX ID	Displays a manually entered or auto-populated numeric identifier. This number is used by field staff when calling in using EVV’s toll free numbers. When manually entering a Santrax ID, it is best practice to use a value of at least six digits. The length of the Santrax ID should be consistent for a given account (For example: all Santrax IDs in Account A are 6 digits in length).

Field/Button/Column	Description
EMAIL ADDRESS	Enter the employee’s email address. This email address is the username for field staff using a mobile application and as the login for Sandata EVV, if the Employee Portal is in use. Temporary passwords are sent to this email address for validation. This field must be unique for each employee within the agency
CONFIRM EMAIL ADDRESS	Re-Enter the employee’s email address.

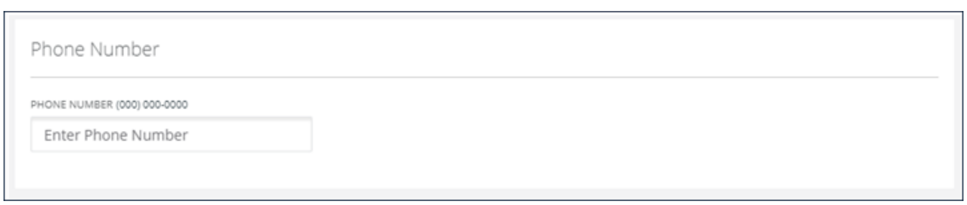
Primary Address Section Fields and Buttons

Primary Address Section

Field/Button/Column	Description
ZIP CODE	Enter the zip for the employee's address.
STATE	Enter the state for the employee's address.
ADDRESS LINE 2	Enter the employee's apartment/suite number, if applicable.
ADDRESS LINE 1	Enter the employee's address.
CITY	Enter the city for the employee's address.

Phone Number Section Fields and Buttons

This section is informational only. The phone number entered is not used during visit validation.

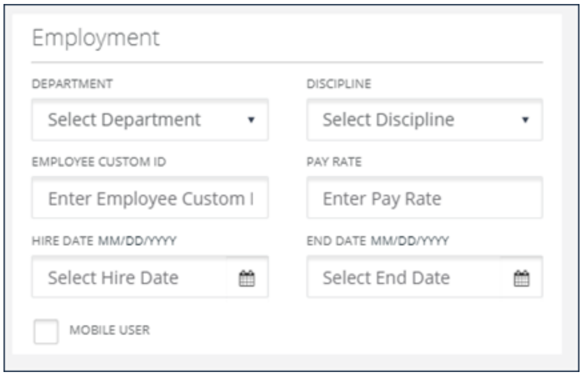


Phone Number Section

Field/Button/Column	Description
PHONE NUMBER	Enter the employee’s phone number (Format: (###) ###-####).

Employment Section Fields and Buttons

The fields in this section are optional unless required by agency or payer configuration.



Employment Section

FieldButton/Column	Description
DEPARTMENT	Use this field to note ID numbers used in previous systems or cross-reference IDs used in current applications.
DISCIPLINE	Select the employee’s role.
EMPLOYEE CUSTOM ID	Use this field to note ID numbers used in previous systems or cross-reference IDs used in current applications.
PAY RATE	Enter the employee’s pay rate.
HIRE DATE (MM/DD/YYYY)	Enter the employee's start date.
END DATE (MM/DD/YYYY)	Enter the employee's termination date.
MOBILE USER	Select this checkbox when the employee is field staff that is using a mobile application. This sends an email to the email address listed with a temporary password for the staff member to log into the mobile application. Field staff can then set up a permanent password and answer security questions.
RESET MOBILE USER PASSWORD	Select this checkbox when the employee is field staff that is using a mobile application. This sends an email to the email address listed with a temporary password for the staff member to log into the mobile application. Field staff can then set up a permanent password and answer security questions.

Creating a New Employee Profile

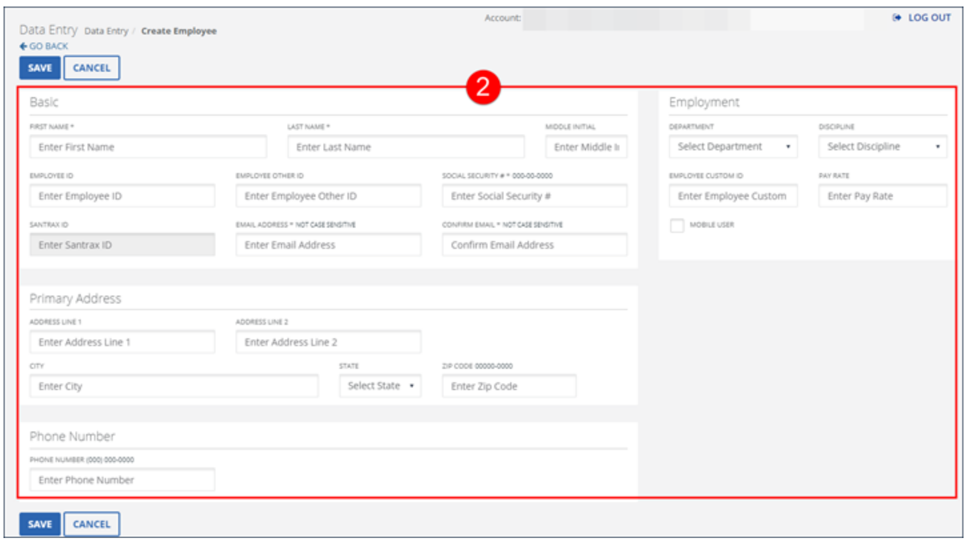
1. Navigate to the Create Employee screen. (**Data Entry > Employees > Create Employee**)

Create Employee Button

	Note: If social security number validation is not enabled, search to ensure there isn't an existing profile before creating a new client profile. This prevents duplicate employee profiles.

2. Enter/Select all applicable fields.
Required fields are indicated by an asterisk (*) and vary based on configuration. At minimum all required fields must be populated.

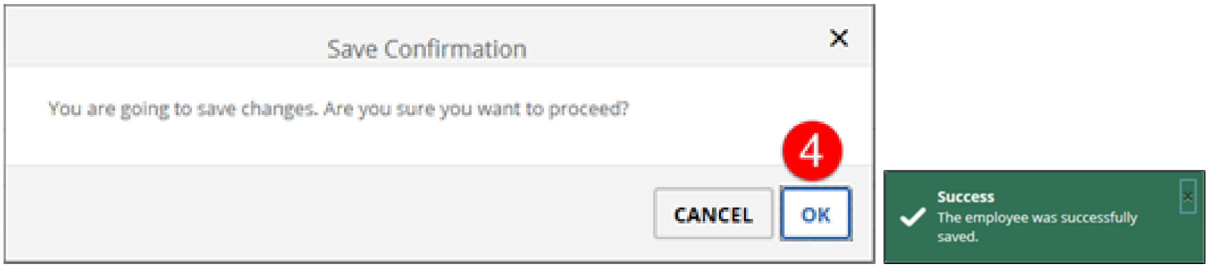
3. Click **SAVE**.



Create Employee screen

Save Button

4. Click **OK** on the **Save Confirmation** popup.
A notification of confirmation or error displays at the top of the screen. The Save Confirmation pop-up includes a notice if the **MOBILE USER** checkbox is not selected.

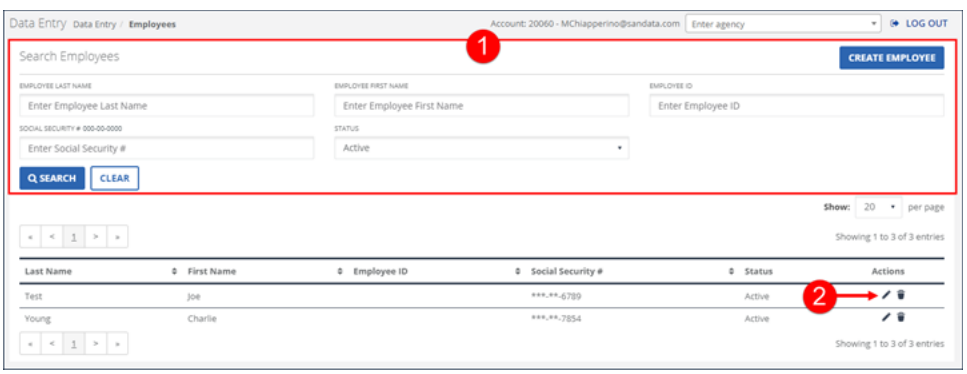


Save Confirmation and Confirmation/Error Notification

	Note: Use the **CREATE EMPLOYEE** button at the top of the Edit Employee screen to create clients consecutively without returning to the Employees screen.

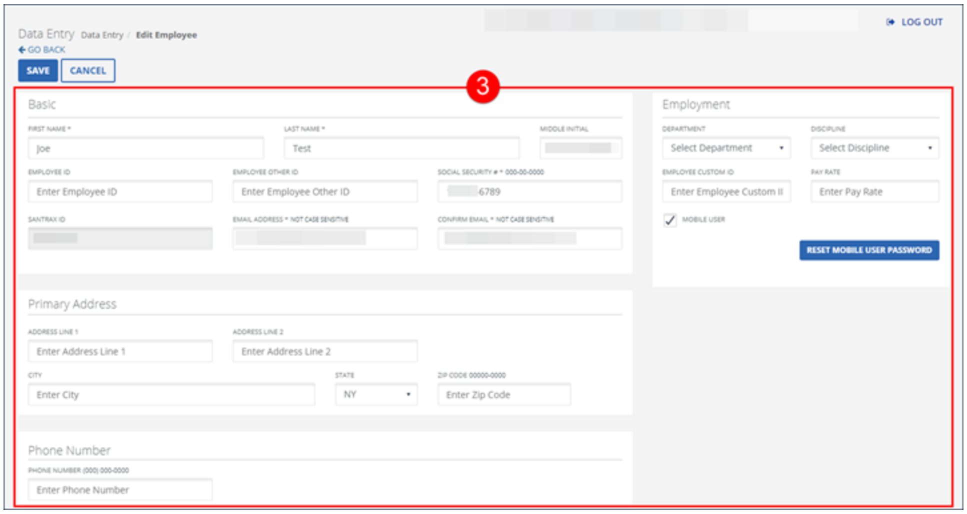
Modifying an Employee Profile

1. Navigate to the Edit Employee screen. (**Data Entry > Employees**)
2. Click the **Edit** icon ( )for the employee or anywhere on the line item.



Employees Screen

3. Modify the applicable fields.
Required fields are indicated by an asterisk (*) and will vary based on configuration. At a minimum all required fields must be populated. When available, click **ADD** to insert the related fields into the table.



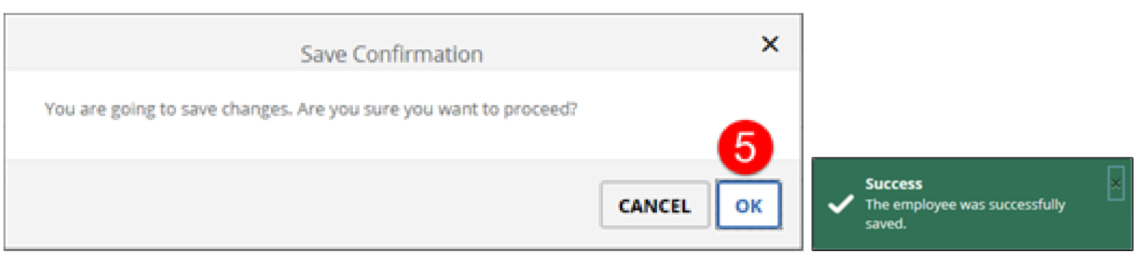
Create Employees Screen

4. Click **SAVE**.

Save Button

Note:
Use the **CREATE EMPLOYEE** button at the top of the Edit Employee screen to create clients consecutively without returning to the Employees screen.

5. Click **OK** on the **Save Confirmation** popup.
A notification of confirmation or error displays at the top of the screen. The Save Confirmation includes a notice if the **MOBILE USER** checkbox is not selected.



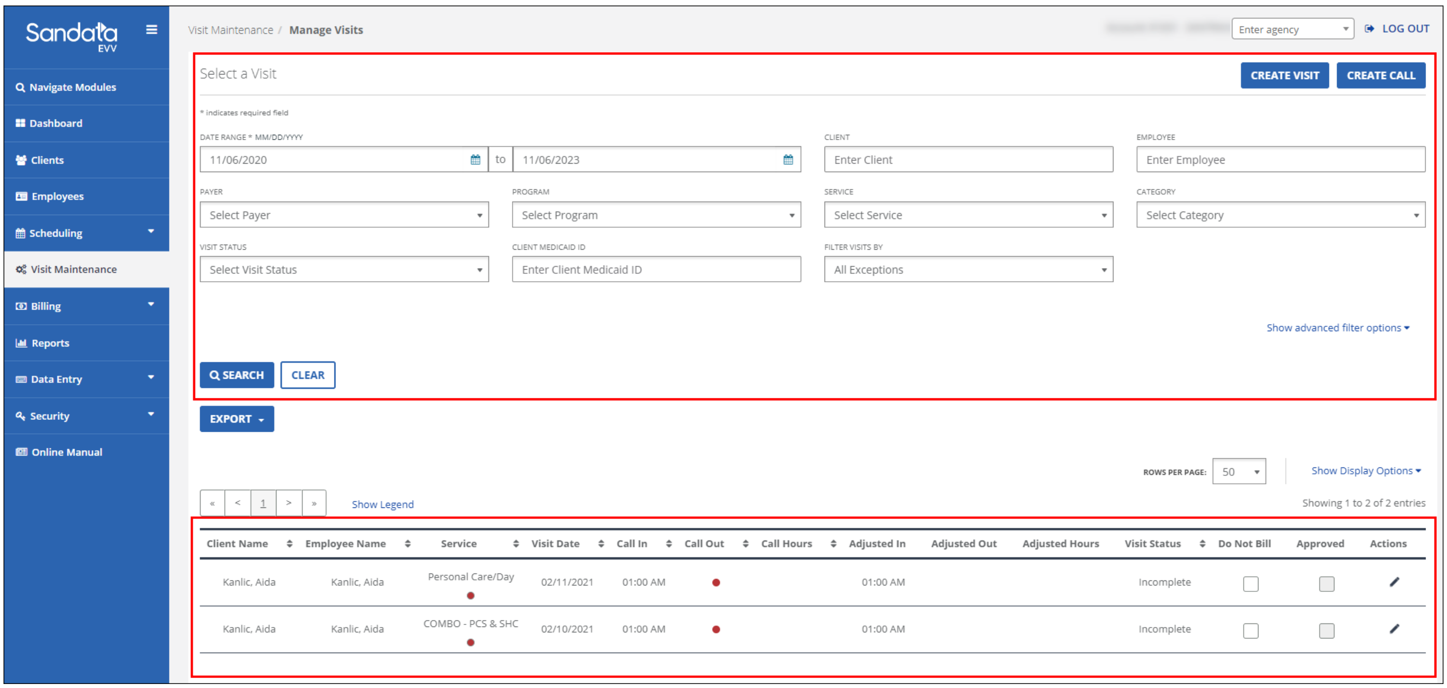
Save Confirmation and Confirmation/Error Notification

Visit Maintenance

The Visit Maintenance section is where all information related to visits is located. Access to the functions in this section are controlled by User Roles and Privileges. Sandata EVV defines as visit as, at a minimum, a schedule or single call. The maximum length of a visit in the Sandata system is 25 hours. (24 hours with an extra hour to account for early or late calls). In this section, users can review detailed information for all visits as well as update visits and correct any exceptions.

Manage Visits Screen

Use the Manage Visits screen to search for visits. The filters on this screen allow users to limit the search results to include only visits matching the search criteria. This allows users to quickly find visits that require attention. The default results shown on this screen only include visits with exceptions.



Visit Maintenance Screen

Field	Description
AGENCY	Use this field to limit the result by a single agency. **Note:** Users can only see agencies they are working with.
CALL TYPE	Use this multi-select field to limit the results to visits with the selected special call type(s) (MVV and Manual).
CATEGORY	Use this drop-down field to limit the results to a single category. Categories may be available as a grouping for payers.

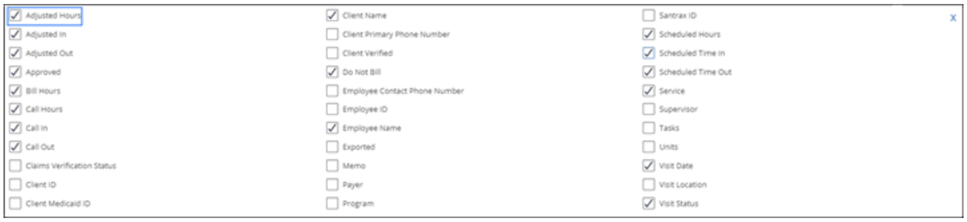
Field	Description
CLIENT	Use this field to limit the results by client name (format: last name, first name) or client ID. When a partial value is entered the report will display results that begin with the entered value.
CLIENT MEDICAID ID	Used to limit the results by the client's Medicaid ID.
CREATE CALL	Use this field to manually create a call. Available based on system configuration. For accounts without scheduling functionality, to create a visit with a start date in the past, a manual call must be created as the first call for the visit.
DATE RANGE	Use these fields to select the date range, all visits that occurred within the selected date range display in the search results. Searching by date or using the date range always returns results based on the date the visit began.
DEPARTMENT	Use this field to limit the results to the visits associated with the employee's department.
EMPLOYEE	Use this field to limit the results by employee name (format: last name, first name). When a partial value is entered the report displays results that begin with the entered value.
EXCEPTION TYPE	Use this multi-select field to limit the results to visits with the selected exceptions. The exceptions in this drop-down are each set up with an effective date range. Exceptions not in effect during the selected visit date are not included in the drop down.
EXPORT	Exports the results in the results grid to a CSV or Excel format.
FILTER VISITS BY	By default, this field is set to **All Exceptions**, which displays all visits with exceptions. In order to include visits without exceptions, select **All Visits.** Select **Exception Type** to limit the results to only visits with the selected exception(s). Example: Unknown Client visits.
GROUP VISIT CODE	Use this field to limit the results by the selected group visit code. Group Visit Codes are a unique six digit code associated with Group Visit functionality and allows user to search for all visits that are part of the same group. Group Visit Codes are unique for the given start date.

Field	Description
PAYER	Use this drop-down field to limit the results to a single payer. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
PROGRAM	Use this field to limit results by the selected program. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
RESET	Clears saved filter settings.
RESULTS LIST	This section displays a grid of visits that match the selected search criteria.
SAVE SETTINGS	Use this button to save selected search filters and results list configuration, for the computer and browser used. Any fields requiring a text entry are not saved. For example, **Client**.
Show/Hide Advanced Filter Options	Displays additional fields, including the ability to save or reset filter selections.
Show/Hide Display Options	Use this link to display additional column options for the results list.
SERVICE	Use this field to limit the results by the selected service. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
SUPERVISOR	Use this field to limit the results to the visits associated with the selected supervisor.

Field	Description
VISIT STATUS	Use this drop-down field to limit the result by visit status. • **Scheduled** – the visit has not yet occurred and has a scheduled start date/time in the future. • **In Process** – the visit is still in progress. Scheduled visits are placed in this status if the scheduled start time has passed or the system has received a call. Unscheduled visits are placed in this status if the system has received a call-in, but not a call out and it is less than 24 hours since the call-in was received. • **Incomplete** – the visit is missing required information. Required information is based on configuration. Missing information is indicated on the visit maintenance grid as exceptions (red dots). To view an exception on the results list, the column with the wrong/missing information must be enabled. All unresolved exceptions for the visit are displayed on the Visit Details screen's **Exceptions** tab. • **Verified** – the visit has no exceptions. A visit in this status is ready to be billed and is eligible to be returned for claims validation, if applicable. • **Approved** – a visit is placed in this status to indicate that the client or user manually approved the visit based on Client Confirmation/Signature or by the user selecting the **Approved** checkbox on the results list or the Visit Details screen. • **Processed** – the visit was returned to the adjudication system during claims validation. • **Omit** - A visit record marked (by the provider) to be ignored. These visits are not expected to be submitted for billing or claims validation and do not require exceptions management.

<u>Columns</u>

By default, only certain information is shown on the Visit Review results list. The columns listed below reflect all columns available using the **Show/Hide Display Options** link.



Column Selection Screen

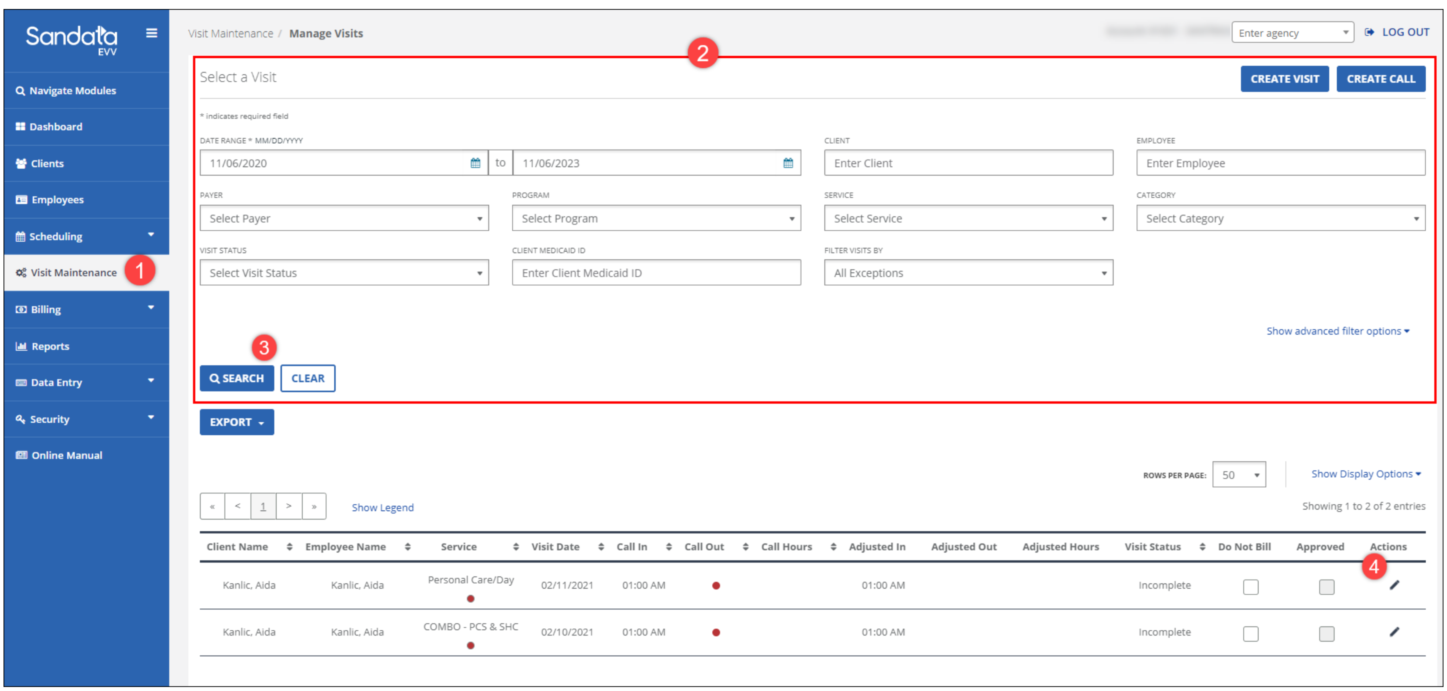
Column	Description
	This symbol is used throughout the results list and indicates one or more exceptions for the related field. Click the symbol to open the Visit Detail screen to the appropriate tab. Hover over this field to show all currently applied exceptions related to this field. NOTE: If the column related to the exception is hidden, users can only view that exception on the Exception tab of the Visit Details screen. Red Exceptions must be fixed. Orange Exceptions must be acknowledged.
	This symbol is used throughout the results list and indicates the client on this visit had an FVV device assigned to them when the visit was started. The serial number of the device is displayed on the Client tab of the Visit Details screen. This information can be used to understand why the No Show status may be applied to a visit, as calls from an FVV device are generally logged by the system after the visit ends.
ADJUSTED HOURS	Displays the time elapsed between the adjusted in and out times, in minutes, when applicable.
ADJUSTED IN	Displays the manually entered call in time, when provided. This field is always updated with the Adjusted Out field.
ADJUSTED OUT	Displays the manually entered call out time, when provided. This field is always updated with the Adjusted In Field.
APPROVED	Displays a checkbox indicating whether or not the visit was approved.
BILL HOURS	Displays the total bill time for the visit. This value is automatically calculated based on the call in/call out times, if applicable. (Format HH:MM)

Column	Description
CALL HOURS	Displays the time elapsed between the call in and out in minutes.
CALL IN	Displays the call in time (Format: AM/PM).
CALL OUT	Displays the call out time (Format: AM/PM).
CLAIM VERIFICATION STATUS	If the account/payer is configured for claims validation and the visit was successfully returned to the claims adjudication engine at least once, this displays a 'Y'. Otherwise, it displays an 'N'.
CLIENT ID	Displays the assigned ID. Hover over this item to view additional client information.
CLIENT MEDICAID ID	Displays the client's Medicaid ID.
CLIENT NAME	Displays the client's name (format: last name, first name).
CLIENT PRIMARY PHONE NUMBER	Displays the client's primary phone number.
CLIENT VERIFIED	If the client has fully verified the visit including all configured confirmations (time, service, signature), this will show a 'Y'. Otherwise, it will show an 'N'.
DO NOT BILL	Selecting this check box flags the visit as omitted. Visits with this status are not be available for claims validation.
EMPLOYEE CONTACT PHONE NUMBER	Displays the employee's phone number.
EMPLOYEE ID	Displays the employee's ID. Hover over this item to view additional employee information.
EMPLOYEE NAME	Displays the employee's name (format: last name, first name).
EXPORTED	Displays an indicator that identifies whether or not a visit was exported. 'Y'=the visit has been exported, 'N'=the visit has not been exported. NOTE: This indicator does not display if the visit was exported via a data warehouse export.
MEMO	Displays the first few characters of an entered memo on the Visit Details screen to indicate there is a memo attached to the visit. The full memo is displayed on the Memo tab of the Visit Details screen.
PAYER	Displays the payer associated with the visit.
PROGRAM	Displays the program associated with the visit.
SANTRAX ID	Displays the employee's Santrax ID.

Column	Description
SCHEDULED HOURS	Display the total amount of scheduled hours for the visit.
SCHEDULED TIME IN	Displays the scheduled start time of the visit.
SCHEDULED TIME OUT	Displays the scheduled end time of the visit.
SERVICE	Displays the service selected or scheduled for the visit.
SUPERVISOR	Displays the client's assigned supervisor.
TASKS	Displays the number of tasks entered. Detailed task information is displayed on the Tasks tab of the Visit Details screen.
UNITS	Displays the number of units for the visit.
VISIT DATE	Displays the date the visit started.
VISIT LOCATION	Currently Unavailable.

Searching for Visits

1. Navigate to the Manage Visits screen.
(Manage Visits)
2. Enter the search criteria.
3. Click **SEARCH**.
4. Click the **Edit** icon ( ) icon to view the Visit Detail screen.



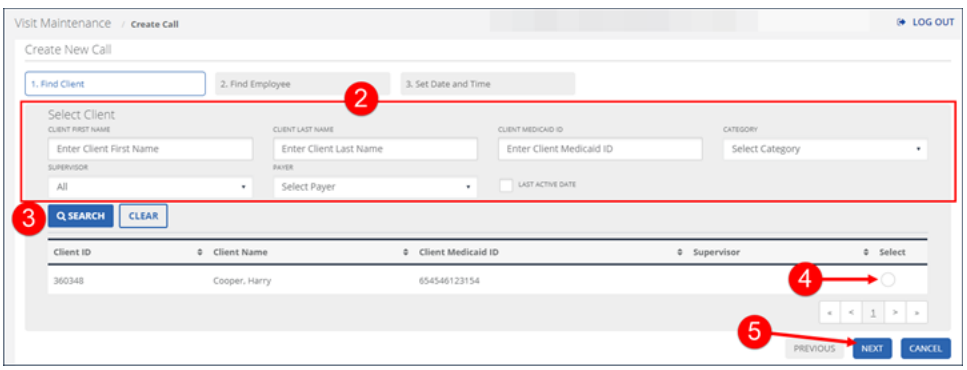
Visit Search Results

Creating a Call

Use this functionality to create a manual call. When no calls or schedules exist, this functionality is used to create a visit with a call in. For example, if the employee forgot to call in, the call in is created with the **CREATE CALL** functionality and the call out is added using the **CALL LOG** section of the Visit Details screen.

1. Navigate to the Create Call screen.
(**Visit Maintenance** > **Create Call**)

2. Enter the search criteria in the Select Client section.
3. Click **SEARCH**.
4. Select a client to add to the visit.
5. Click **NEXT**.



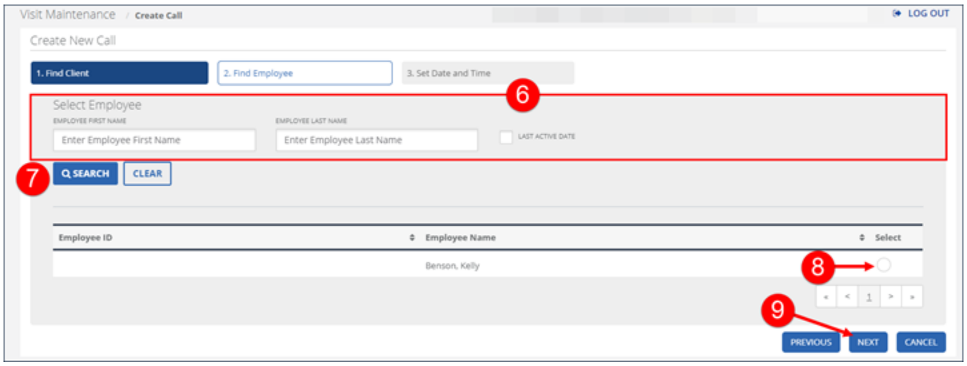
Create New Call - Select Client

6. Enter the search criteria in the Select Employee section.
In certain circumstances, the employee is pre-filled and this screen is skipped.

7. Click **SEARCH**.

8. Select an employee to add to the visit.

9. Click **NEXT**.



10. Enter the **FVV CALL IN** reading, if applicable.
This field only displays if the client has a registered FVV device. FVV values are always 6 digits.

11. Enter the **FVV Call OUT** reading, if applicable.
This field only displays if the client has a registered FVV device. FVV Values are always 6 digits.

12. Enter the **DATE.**

13. Enter the **TIME.**

14. Select the **TIME ZONE.**
Time Zone should default based on the client's configured time zone.

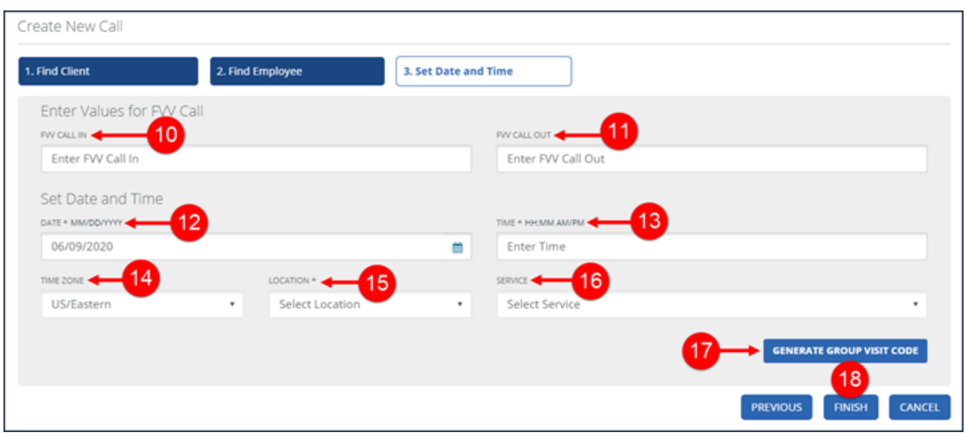
15. Select a **LOCATION**, if applicable.
This field only displays if the account is configured to a require a location when calling in for a visit. The value is this field is Home or Community.

16. Select the **SERVICE.**

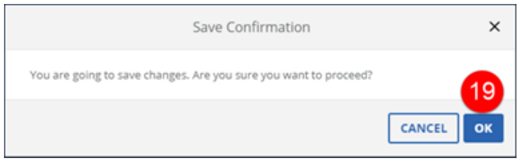
17. Click **GENERATE GROUP VISIT CODE**, if applicable.
This button only displays for accounts configured to use advanced Group Visit functionality.

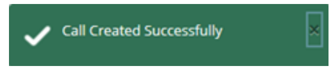
Note:
The **GENERATE GROUP VISIT CODE** button is only used to create a new group visit code. For example, if a group visit was performed but not captured by the system, users should use this functionality to create a group visit code and add this code to each visit that was part of the group. Use the Visit Details screen to add a visit to an existing group visit.

18. Click **FINISH.**



19. Click **OK** on the **Save Confirmation** popup.





Visit Details Screen

Use the Visit Details screen to review detailed information about a visit as well as make any corrections or updates to the visit. The screen is divided into multiple tabs, with each tab containing a different set of information about the visit. Some of the information displayed is for reference only and cannot be changed. Users can only view the tabs for which they have the appropriate privileges, other tabs are not shown.

Visit Details Screen - Header

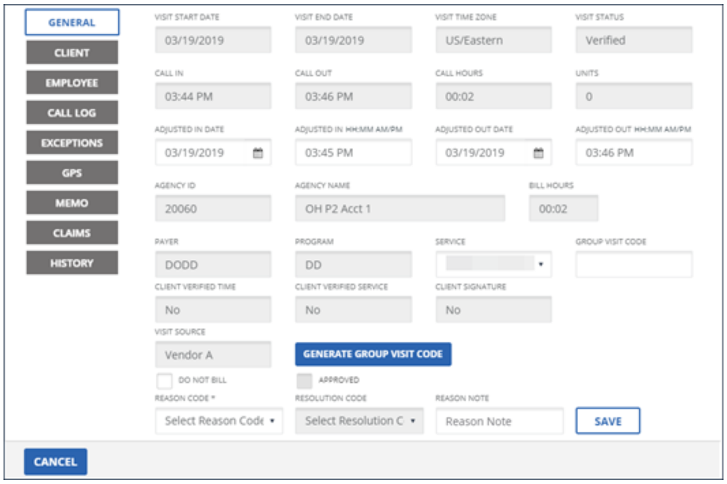
This header appears at the top of every tab in the Visit Details screen. It contains basic client and employee information associated with the visit.

Visit Details - Header

Field	Description
VISIT START DATE	Displays the visit start date.
EMPLOYEE NAME	Displays the employee's name.
EMPLOYEE ID #	Displays the employee's ID number.
CLIENT NAME	Displays the client's name.
MEDICAID ID	Displays the client's Medicaid ID number.
CLIENT ID #	Displays the client's ID number.

Visit Details Screen – General

The General tab contains detailed information about the visit. This tab allows users to quickly review visit information as well as update certain fields.



Visit Details - General

Field	Description
ADJUSTED IN DATE	Displays a manually entered visit start date, if one was entered for the visit. Use this field to update the start date of a visit, within limits, based on associated schedules and/or calls.
ADJUSTED IN HH:MM AM/PM	Displays the manually entered call in time, when applicable. If there is a call in, this value is prefilled to match the call in time. The values in these fields are automatically populated with the value from the call in/out fields. If either the Adjusted In or Adjusted Out values are changed, the value in both fields is saved.
ADJUSTED OUT DATE	Displays a manually entered end for a visit, if one was entered.
ADJUSTED OUT HH:MM AM/PM	Displays the manually entered call out time, when applicable. If there is a call out, this value is automatically populated with the values from the Call In/Call Out fields. This value is only saved if it is changed and if there is also an adjusted in time.
AGENCY ID	Displays the agency's Sandata assigned ID.
AGENCY NAME	Displays the agency's name.

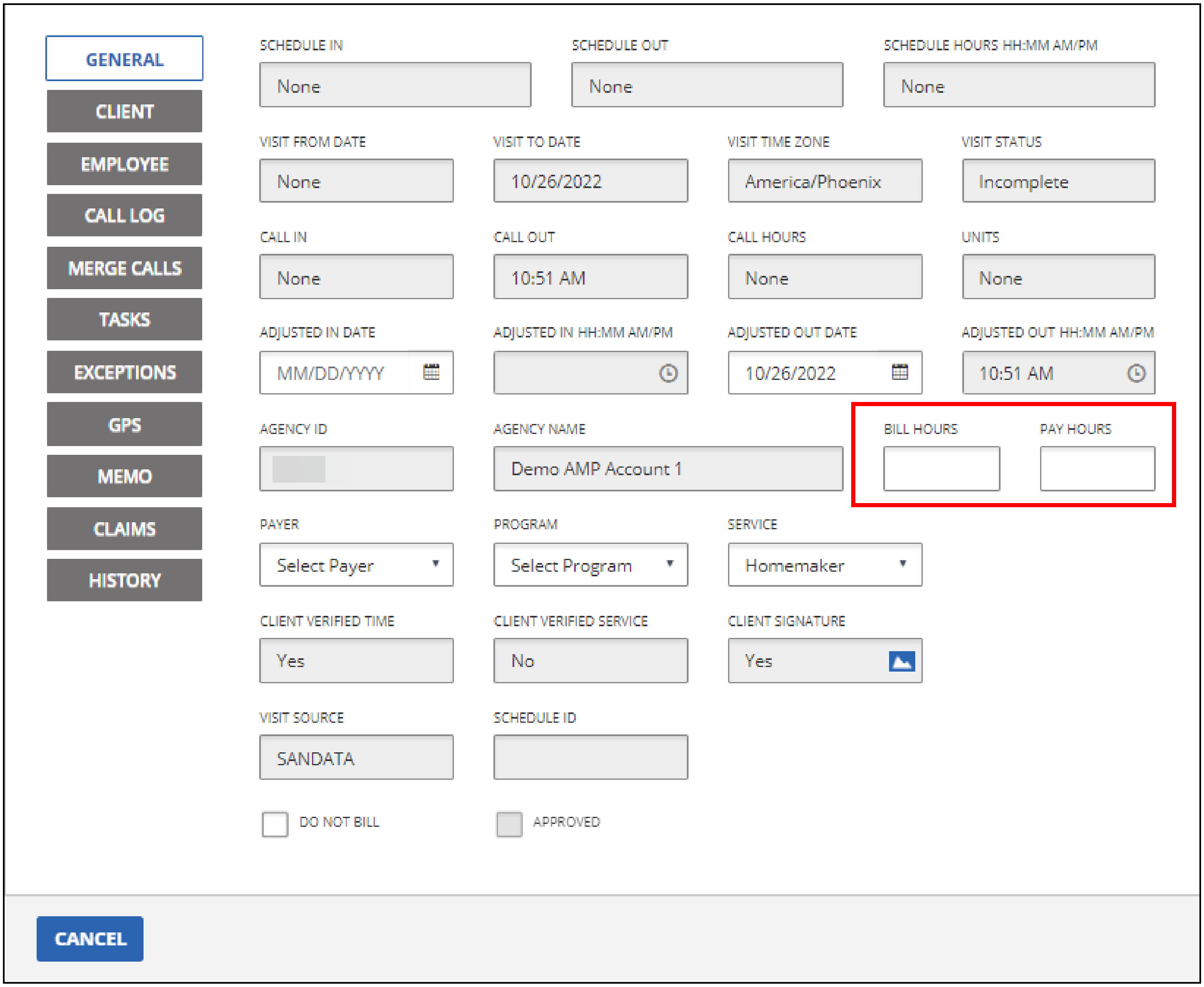
Visit Details Screen – General

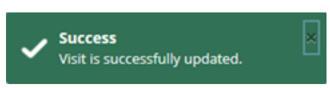
Field	Description
BILL CODE	Displays the HCPCS code to be used for billing. This value may be hidden if it is the same as the HCPCS code.
BILL HOURS	Displays the billable hours. Format (HH:MM).
CALL HOURS	Displays the time elapsed between the call in and out. (Format HH:MM).
CALL OUT	Displays the call out time for the visit.
CALL IN	Displays the call in time for the visit.
CLIENT SIGNATURE	Displays whether or not the client has provided a digital or voice signature. The icon indicates a voice recording. The icon indicates a signature. Click the icon to listen to the recording or view the signature.
CLIENT VERIFIED SERVICE	Displays whether or not the client has verified the service.
CLIENT VERIFIED TIME	Displays whether or not the client has verified the visit start and end times.
DO NOT BILL	Selecting this check box flags the visit as omitted. Visits with this status will not be submitted for claim validation.
GENERATE GROUP VISIT CODE	Creates a new group visit code and associates the group visit code with the visit.
GROUP VISIT CODE	Displays a group visit code, if this visit is part of a group visit.
PAY HOURS	Displays the payable hours. Format (HH:MM).
PAYER	Displays the payer for the visit.
PROGRAM	Displays the program for the visit.
SERVICE	Displays the service for the visit. This may be the same as the HCPCS code.
UNITS	Displays the billing quantity for the visit, converted to units. Units are defined based on how the service is billed.
VISIT END DATE	Displays the visit end date.
VISIT START DATE	Displays the visit start date.
VISIT STATUS	Displays the status for the visit.
VISIT SOURCE	Displays the source of the visit. For visits captured by Sandata EVV the source is Sandata. For some programs using an Alternate EVV system, the name of the alternate system is displayed.
VISIT TIME ZONE	Displays the time zone for the visit.

Adjusting Pay and Bill Hours

If a visit has missing and/or incorrect Pay or Bill hours, use the General tab of the Visit Details screen to manually enter the corrected hours. In order to save a visit that has been modified, users may be required enter a **REASON CODE** and **RESOLUTION CODE**. **REASON CODE** and **RESOLUTION CODE** fields only display if the system is configured to support that functionality.

1. Navigate to the General section of the Visit Details screen. (**Visit Maintenance** > search for and open the visit ( ) > **General**)
2. Enter/Select any applicable adjusted fields (**PAY HOURS**, **BILL HOURS**).
Bill and pay hours automatically populate.
3. Select the **REASON CODE**.
4. Select the **RESOLUTION CODE**.
5. Enter a **REASON NOTE**, if applicable.
Use the **REASON NOTE** field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.
6. Click **SAVE**.
A notification of conformation or error displays at the top of the screen.

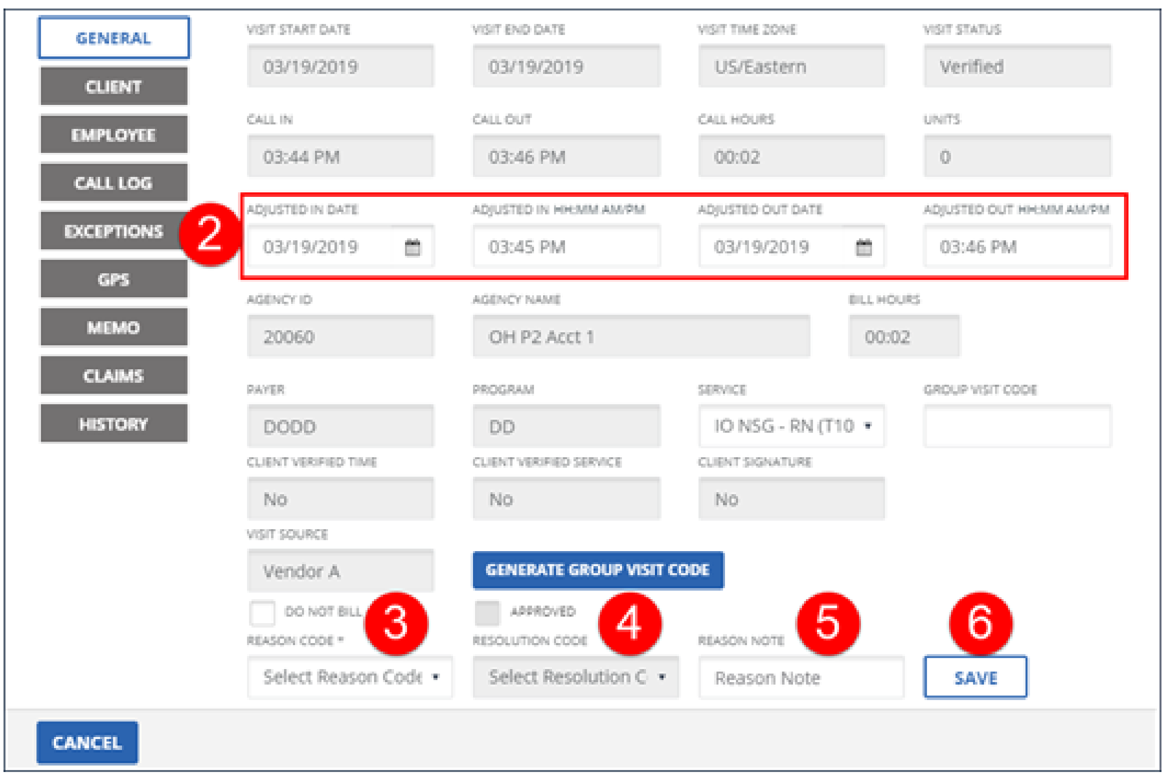

GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY
SCHEDULE IN
None
SCHEDULE OUT
None
SCHEDULE HOURS HH:MM AM/PM
None
VISIT FROM DATE
None
VISIT TO DATE
10/26/2022
VISIT TIME ZONE
America/Phoenix
VISIT STATUS
Incomplete
CALL IN
None
CALL OUT
10:51 AM
CALL HOURS
None
UNITS
None
ADJUSTED IN DATE
MM/DD/YYYY
ADJUSTED IN HH:MM AM/PM
ADJUSTED OUT DATE
10/26/2022
ADJUSTED OUT HH:MM AM/PM
10:51 AM
AGENCY ID
AGENCY NAME
Demo AMP Account 1
BILL HOURS
PAY HOURS
PAYER
Select Payer
PROGRAM
Select Program
SERVICE
Homemaker
CLIENT VERIFIED TIME
Yes
CLIENT VERIFIED SERVICE
No
CLIENT SIGNATURE
Yes
VISIT SOURCE
SANDATA
SCHEDULE ID
DO NOT BILL
APPROVED
CANCEL

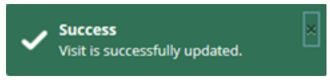

Success
Visit is successfully updated.

<u>Adjusting Call Times and Dates</u>

If a visit has missing and/or incorrect dates or call in/out times, use the General tab of the Visit Details screen to manually enter the adjusted dates and/or times. In order to save a visit that has been modified, users may be required enter a **REASON CODE** and **RESOLUTION CODE**. **REASON CODE** and **RESOLUTION CODE** fields only display if the system is configured to support that functionality.

1. Navigate to the General section of the Visit Details screen. (**Visit Maintenance** > search for and open the visit (☑) > **General**)
2. Enter/Select any applicable adjusted fields (**ADJUSTED IN/OUT DATE**, **ADJUSTED IN/OUT** time).
   Bill and pay hours automatically populate.
3. Select the **REASON CODE**.
4. Select the **RESOLUTION CODE**.
5. Enter a **REASON NOTE**, if applicable.
   Use the **REASON NOTE** field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.
6. Click **SAVE**.
   A notification of conformation or error displays at the top of the screen.

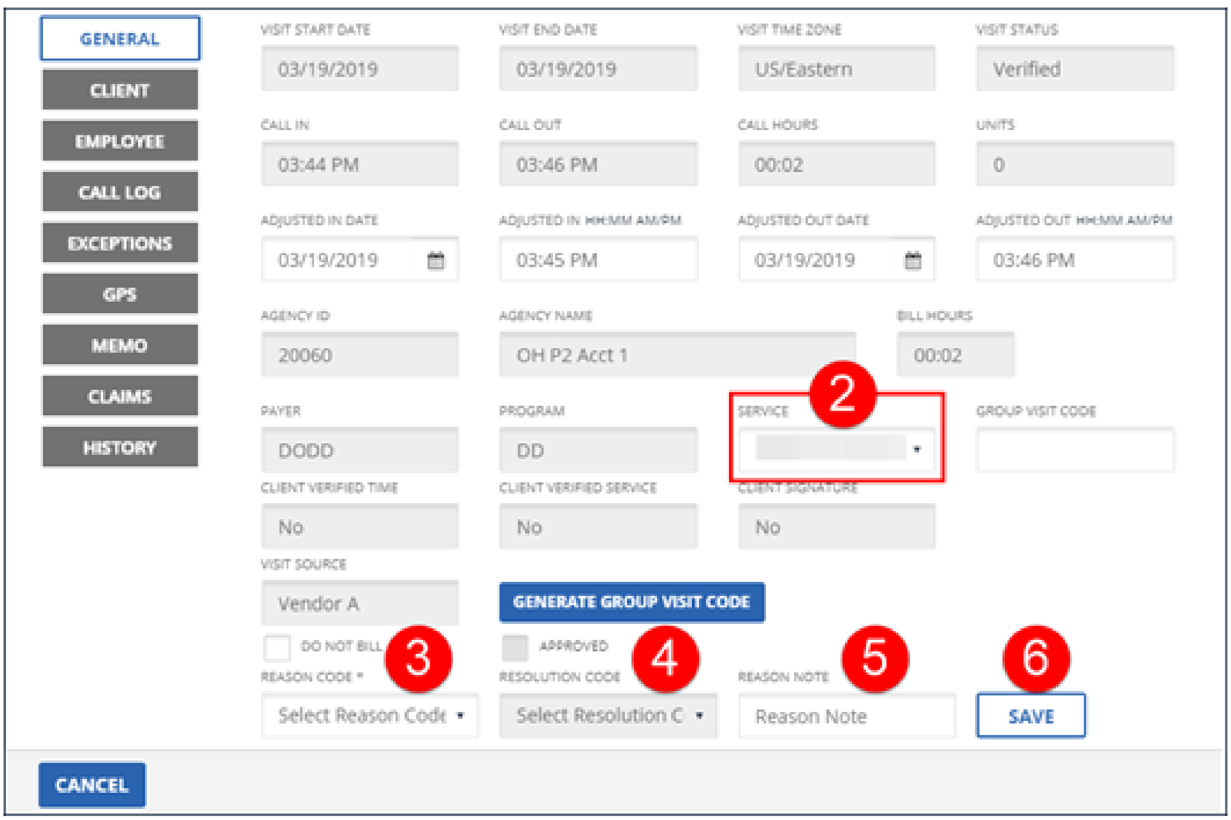


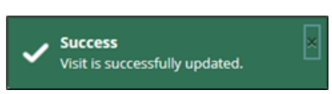

Success
Visit is successfully updated.

Adding/Fixing an Incorrect or Missing Service

A service is the type of care provided to a client during a visit. Services are sourced from the authorization, the schedule or the visit. Services entered on the visit should match the service to be billed, especially if EVV validation occurs during claims processing. This process is also used to resolve service related exceptions (Example: missing service).

1. Navigate to the General section of the Visit Details screen. (**Visit Maintenance** > search for and open a visit > ( ) > **General**)
2. Enter/Select the **SERVICE**.
3. Select the **REASON CODE**.
4. Select the **RESOLUTION CODE**.
5. Enter a **REASON NOTE**, if applicable.
   Use the **REASON NOTE** field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.
6. Click **SAVE**.
   A notification of confirmation or error displays at the top of the screen.

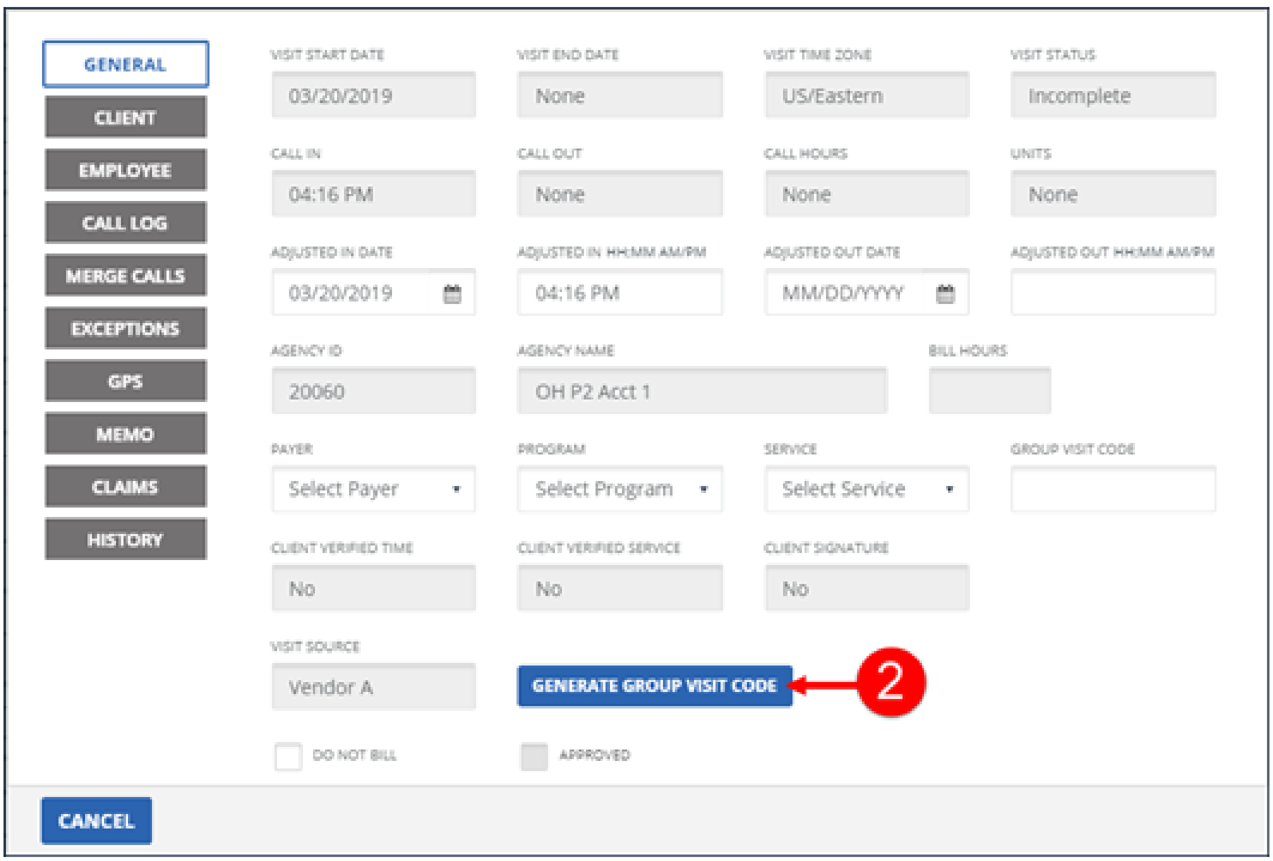




Creating a Group Visit Code

Group Visit functionality allows multiple employees to provide services for two or more individual clients. A group visit is defined as visits for two or more individual clients, linked by a shared group visit code. A group visit code is a unique value assigned to each visit that occurred as part of the group visit and links the visits together. Create a group visit code on the General tab of the Visit Details screen. When the last individual client in the group's visit is completed, the group visit ends. To create a group visit code:

1. Navigate to the General section of the Visit Details screen. (**Visit Maintenance** > search for and open a visit > (✎) > **General**)
2. Click **GENERATE GROUP VISIT CODE** to populate the **GROUP VISIT CODE** field with a new group visit code.



3. Select the **REASON CODE**.

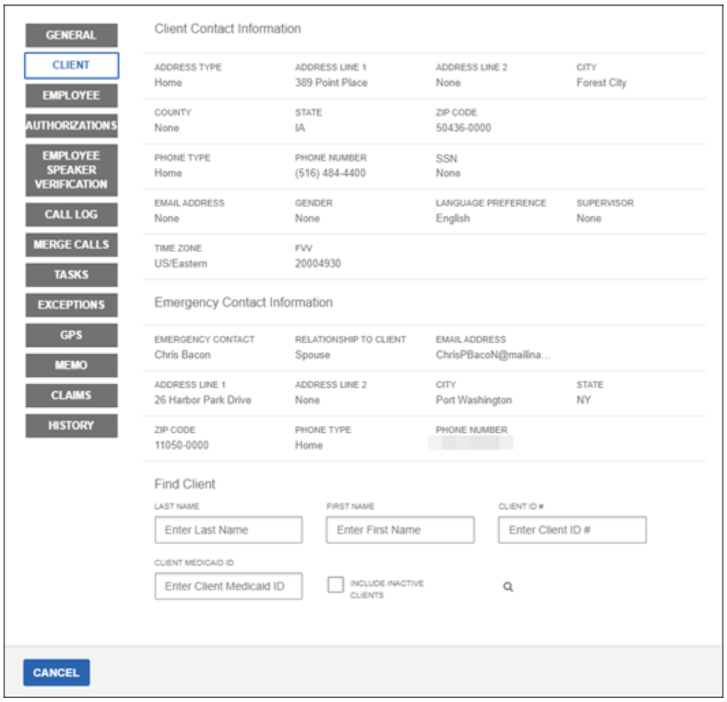
4. Select the **RESOLUTION CODE**.

5. Enter a **REASON NOTE**, if applicable.
The **REASON NOTE** field is used to enter additional information about the visit and may be required based on the **REASON CODE** selected.

6. Click **SAVE**.

Visit Details Screen – Client

The Client tab displays general information about the client who received services for the visit. Users can quickly review details about the client without leaving the Visit Details screen. On this screen, users can also add a client to a visit, if one was not already on the visit (Unknown Client) or correct a client who was on the visit in error. The number displayed in the FVV field is the serial number of the FVV device assigned to the client as of the visit date.



Visit Details - Client

Field	Description
Client Contact Information	Displays the contact information from the client's profile.
Emergency Contact	Displays the emergency contact information from the client's profile.

Updating an Unknown Client

1. Navigate to the Client section of the Visit Details screen.
(**Visit Maintenance** > search for an open a visit ( )> **Client**)

2. Enter all applicable search criteria in the Find Client section of the screen.
Select the **INCLUDE INACTIVE CLIENTS** checkbox to include clients with a status of 'Inactive' in the search results.

3. Click the magnifying glass icon to search for a client.

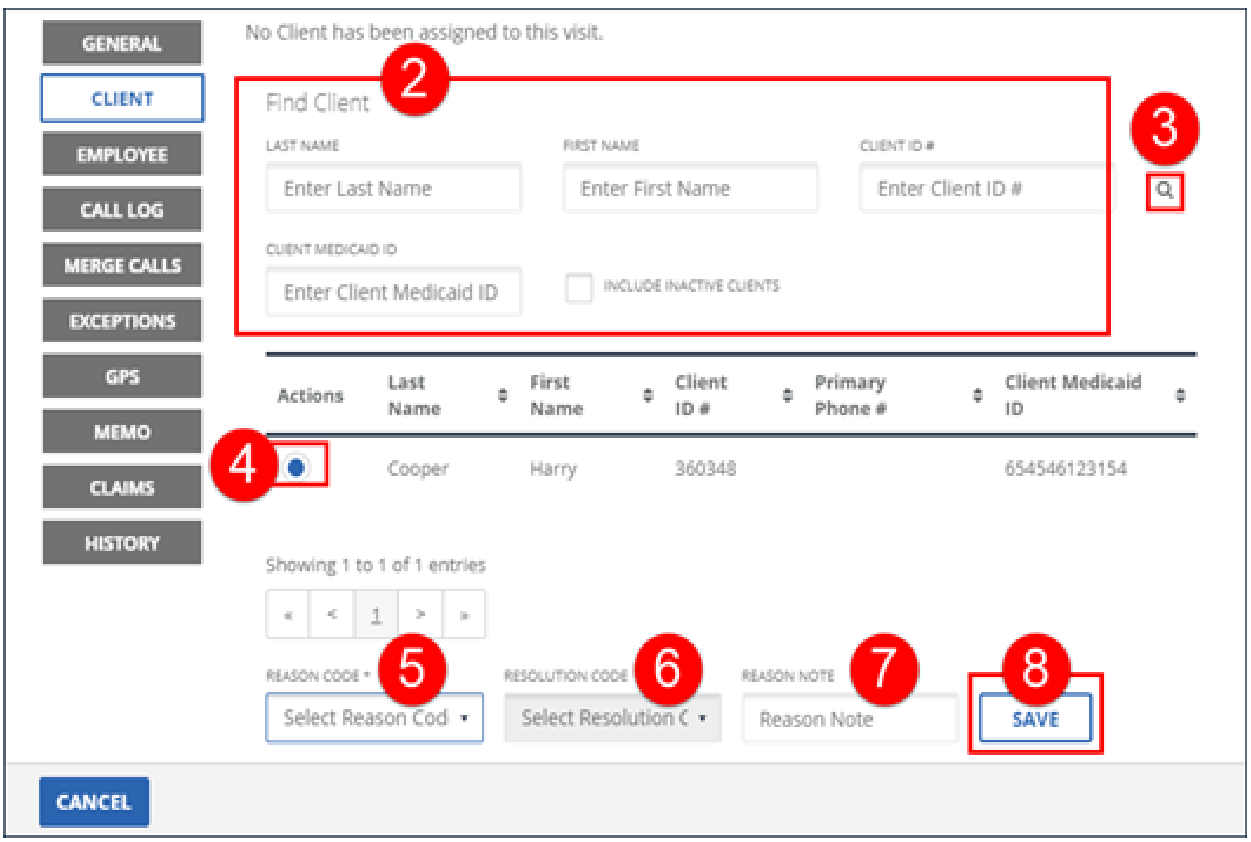
4. Select a client.

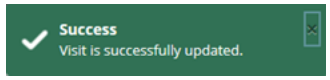
5. Select the **REASON CODE**.

6. Select the **RESOLUTION CODE.**

7. Enter a **REASON NOTE**, if applicable.
Use the **REASON NOTE** field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.

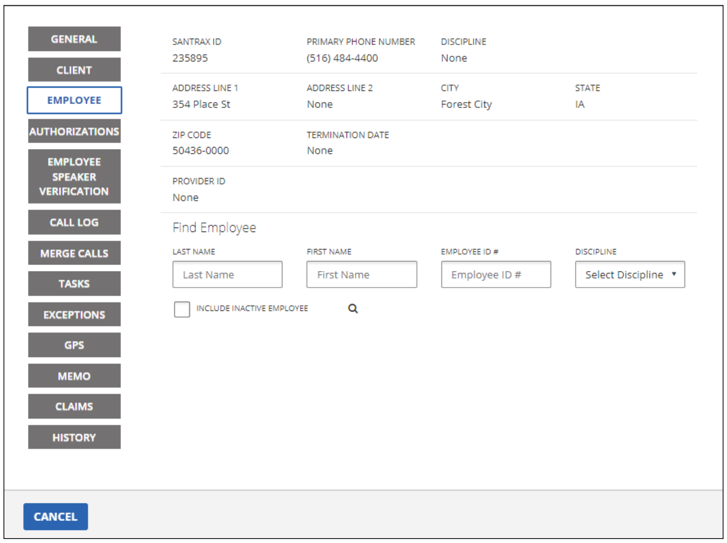
8. Click **Save**.
A notification of confirmation or error displays at the top of the screen.





Visit Details Screen – Employee

The Employee tab displays general information about the employee who attended the visit. Users can quickly review details about the employee without leaving the Visit Details screen. On this screen, users can also add an employee to a visit, if one was not already on the visit (Unknown Employee exception) or correct an employee who was on the visit in error.



Field	Description
Employee Information	Displays the general information from the client's profile.
Find Employee	Use these fields to search for an employee to add to the visit. Select the **INCLUDE INACTIVE EMPLOYEES** checkbox to include employees with a status of 'Inactive' in the search results.

Updating a Unknown Employee

1. Navigate to the Employee section of the Visit Details screen. (**Visit Maintenance** > search for and open a visit ( ) > **Employee**)

2. Enter all applicable search criteria in the Find Employee section of the screen.
Select the **INCLUDE INACTIVE EMPLOYEES** checkbox to include employees with a status of 'Inactive' in the search results.

3. Click the magnifying glass icon to search for an employee.

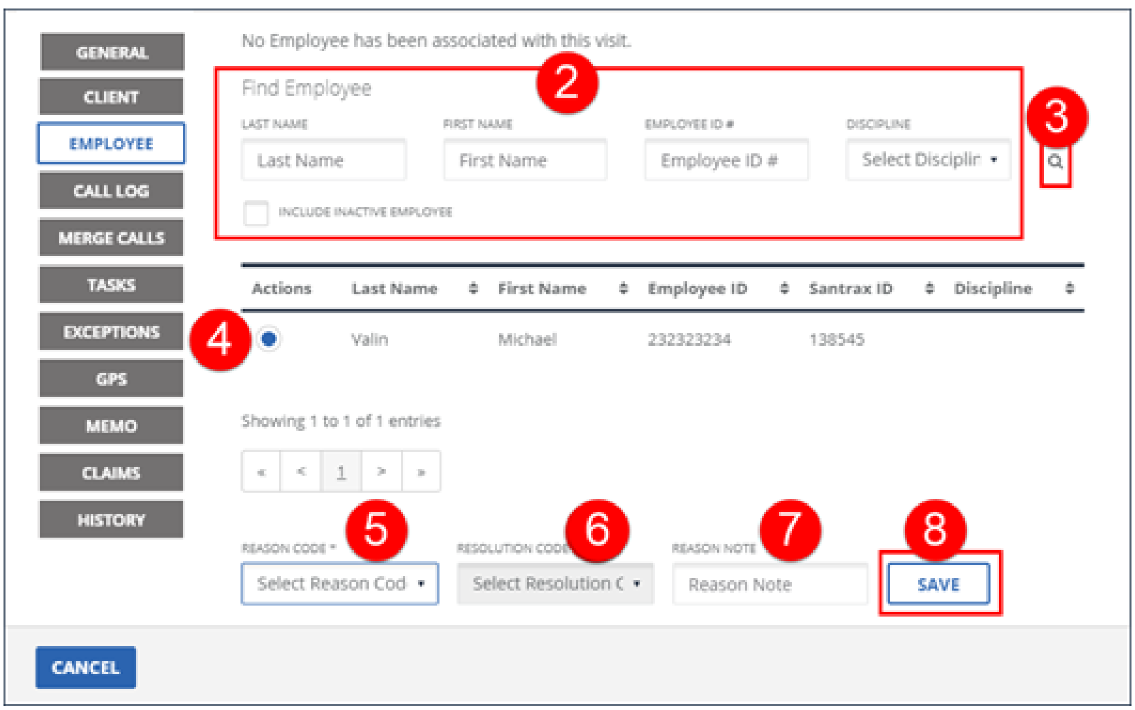
4. Select an employee.

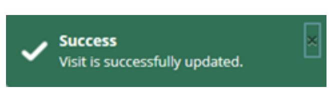
5. Select the **REASON CODE**.

6. Select the **RESOLUTION CODE**.

7. Enter a **REASON NOTE**, if applicable.
Use the Reason Note field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.

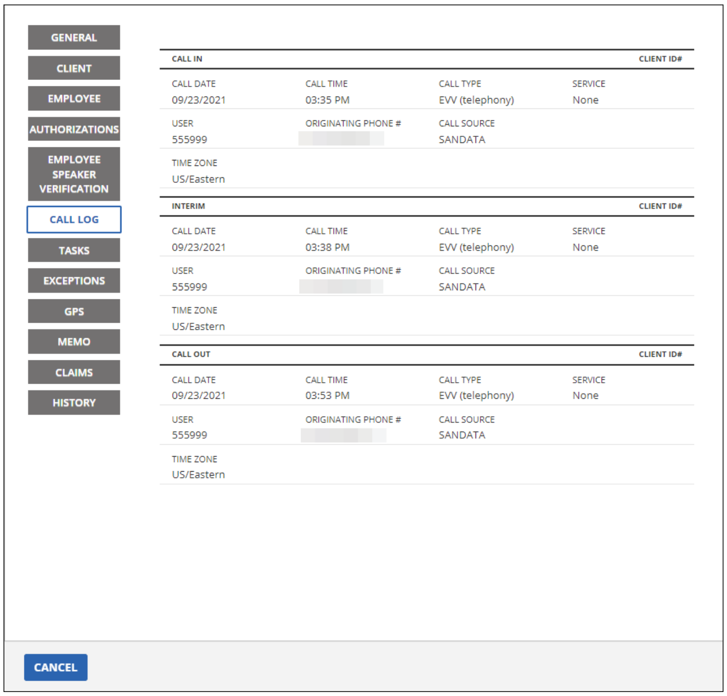
8. Click **SAVE.**
A notification of confirmation or error displays at the top of the screen.





Visit Details Screen – Call Log

The Call Log tab displays all in, out and interim call related information: the date of visit, call in and call out times, services performed, the source of the call and Fixed Visit Verification (FVV) readings. Call information for all applicable calls are included in the log, but calls placed too soon after an in or before an out call are labeled as interim. The location the call was placed from is also displayed here as Home or Community, if the account is configured to require that information. The displayed information differs based on the call type. On this screen users can also add calls to visits.



Call Log

Field	Description
Add Manual Call	Use this section to add a manual call to the visit.
CALL IN	Displays information associated with the call in.
CALL OUT	Displays information associated with the call out.
INTERIM	Displays information related to an interim call (An additional call applied to the visit that is neither the in or the out call).

Adding a Manual call to an Existing Visit

The Merge Calls tab allows users to add a manual call if both the client and the employee on the visit are known. A manual call is captured like any other call, but is entered by an EVV system user. The system notes the user who created the manual call as well as the date and time the call was created. Depending on configuration, the available fields on this screen will change. Fill out all fields that apply to the account's configuration. Manual Calls are saved with the Call Type 'Manual'.

1. Navigate to the Call Log section of the Visit Details screen.
(**Visit Maintenance** search for the visit > Open **Visit Details** ( )-**Call Log**)

2. Enter the **FVV Value.**
Skip, if an FVV device was not used.

3. Enter the **CALL DATE**.
If an FVV Value is entered, call date is calculated based on the FVV value.

4. Enter the **CALL TIME**.
If an FVV value is entered.

5. Select the **SERVICE**, if applicable.
Skip, if the service is represented on available call.

6. Select the **REASON CODE**.

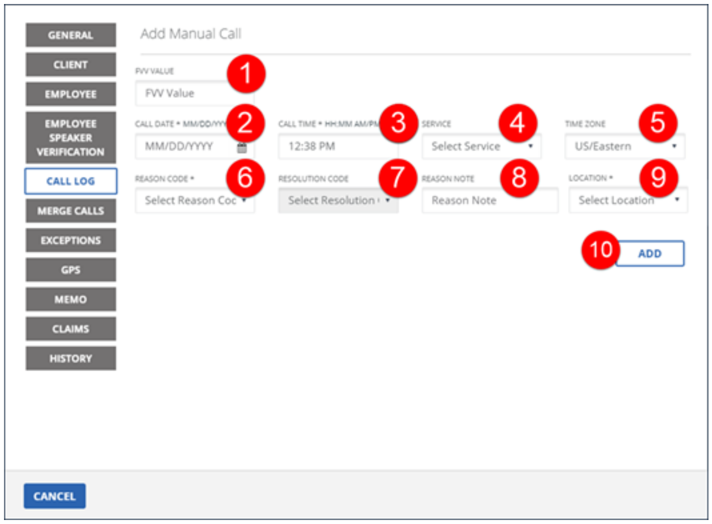
7. Select the **RESOLUTION CODE**, if applicable.
Skip, if the service is represented on available call.

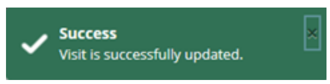
8. Enter a **REASON NOTE**, if applicable.
Use the Reason Note field to add additional information about the visit. Some Reason Codes require a Reason Note.

9. Enter a **LOCATION**, if applicable.
This field only displays if an account is configured to require a location when calling in for a visit. The value is this field is either Home or Community.

10. Click **ADD.**
A notification of confirmation or error displays at the top of the screen.

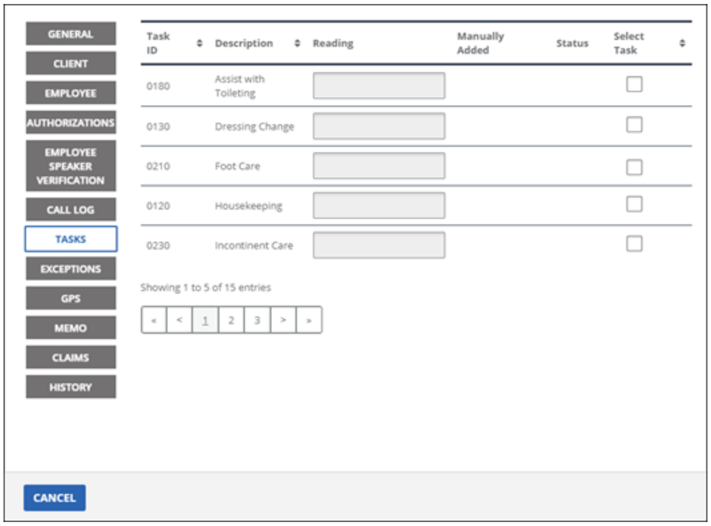
Adding a Manual call to an Existing Visit





Visit Details Screen -Tasks

This screen allows users to review the tasks entered during a visit. Information about each task entered is displayed on this screen, including the task ID, description, and any readings entered for a task. On this screen, tasks can be manually added to the visit. Users can add multiple tasks to a visit using the same reason and resolution codes.



Tasks Screen

Field/Button/Column	Description
TASK ID	Displays information associated with the call in.
DESCRIPTION	Displays information associated with the call out.
READING	Displays information related to an interim call (An additional call applied to the visit that is neither the in or the out call).
MANUALLY ADDED	Indicates if the task was manually added to the visit.
STATUS	Indicates the status of the task.
SELECT TASK	Click this checkbox to select a task to be added to the visit.

Manually Adding and Removing Tasks

Depending on account set up, the service selected for the visit limits the tasks selection to that service.

1. Navigate to the Tasks section of the Visit Details screen.
(**Visit Maintenance** > search for and open a visit ( ) > **Tasks**)

2. Select the checkboxes for each task that must be added to the visit. Deselect the checkboxes for each task that must be removed from the visit.

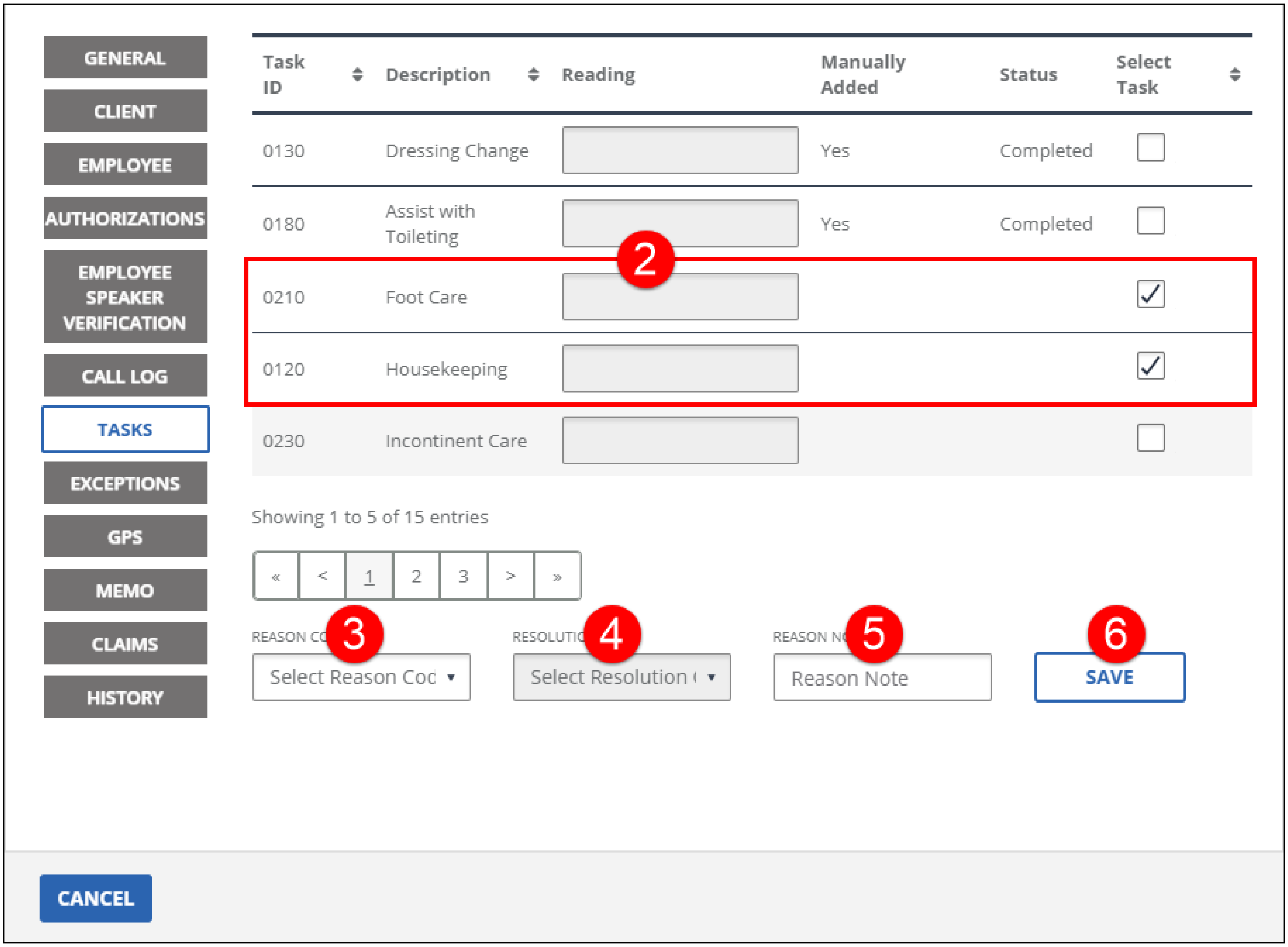
3. Multiple tasks can be selected and added to the visit using the same reason and resolution codes. If a reading is available for a task, it can be entered or dated here.

4. Select the **REASON CODE**.

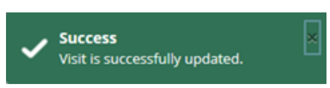
5. Select the **RESOLUTION CODE**.

6. Enter a **REASON NOTE**, if applicable.

7. Click **SAVE**.
A notification of confirmation or error displays at the top of the screen. The selected tasks are marked as complete and the Manually Added column displays “Yes” for any task users manually add to visits.



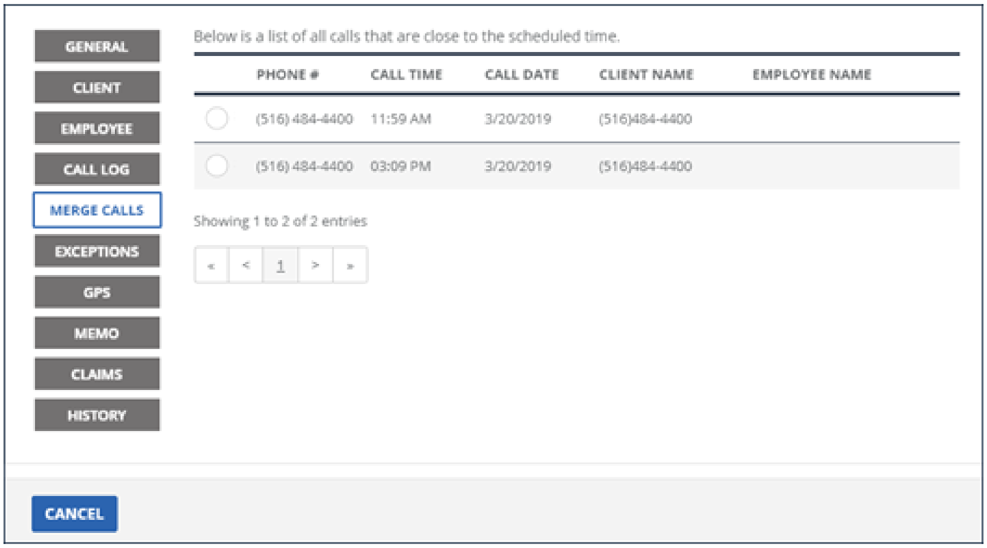
GENERAL
CLIENT
EMPLOYEE
AUTHORIZATIONS
EMPLOYEE SPEAKER VERIFICATION
CALL LOG
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY
Task ID
Description
Reading
Manually Added
Status
Select Task
0130 Dressing Change Yes Completed
0180 Assist with Toileting Yes Completed
0210 Foot Care
0120 Housekeeping
0230 Incontinent Care
Showing 1 to 5 of 15 entries
« < 1 2 3 > »
2
3
4
5
6
REASON CO
Select Reason Coc
RESOLUTIO
Select Resolution (
REASON N
Reason Note
SAVE
CANCEL



Success
Visit is successfully updated.

Visit Details Screen – Merge Calls

This screen allows users to add a call from another visit to an existing visit that has one or no calls in order to complete the visit. Visits can be missing calls if an employee did not correctly call in or out, or if matching logic did not match a call with a visit. If a call is missing both the client and the employee, the call may not be available for selection due to agency or payer configuration.

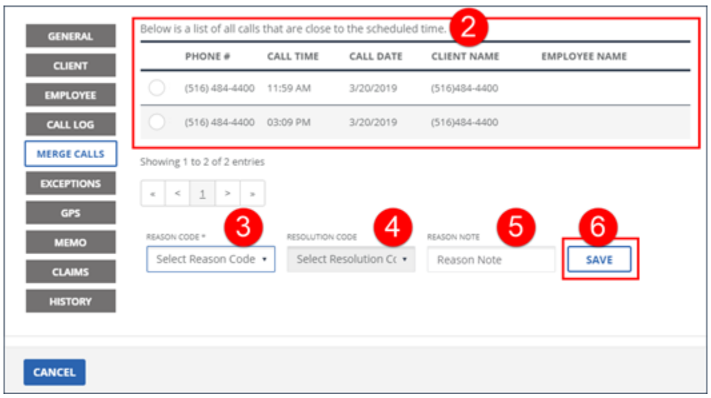


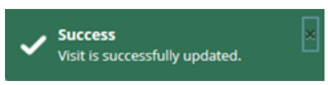
Merge Calls

Field	Description
CALL TIME	Displays the time of the call.
PHONE #	Displays the phone number used to place the call.
EMPLOYEE NAME	Displays the employee's name.
CALL DATE	Displays the date of the call.
CLIENT NAME	Displays the client's name.

Merging Calls

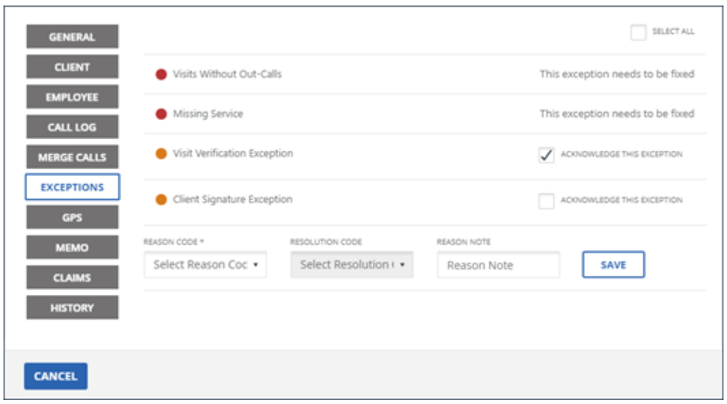
1. Navigate to the Merge Calls section of the Visit Details screen. (**Visit Maintenance** > search for and open a visit (✎) > **Merge Calls**)
2. Select the missing in or out call.
3. Select the **REASON CODE**.
4. Select the **RESOLUTION CODE**.
5. Enter a **REASON NOTE**, if applicable.
6. Click **SAVE**.
A notification of confirmation or error displays at the top of the screen.





Visit Details Screen - Exceptions

This screen displays all exceptions that prevent a visit from being billable or ready for claims validation. All exceptions must be resolved and cleared to verify the visit. Exceptions can be resolved by either fixing (red exceptions) or acknowledging (orange exceptions) the exception. To fix an exception, users must add missing information to or correct invalid information on the visit. For example, to fix the ‘Missing Service’ exception, users add a service to the visit. To fix the ‘Invalid Service’ exception, users must select a valid service replacing the service on the visit. To acknowledge an exception, users must select the **ACKNOWLEDGE THIS EXCEPTION** checkbox.



Visit Details - Exceptions

Field	Description
ACKNOWLEDGE THIS EXCEPTION	Select this checkbox in order to acknowledge the exception and provide reason/resolution codes for this visit. Select this checkbox for more than one exception, then enter a Reason Code and/or Resolution Code to acknowledge all selected exceptions with the same Reason/Resolution Codes.
ADD REASON CODE ADD REASON CODE	Use this button to add a reason code or visit location without a required exception. Any reason code or location added is visible on the Visit Details Screen – History tab.
Orange Exception	Indicates an exception that must be acknowledged exists for this visit.
REASON CODE	Use this field to enter a reason code for the exception. All options in this drop-down are set up with an effective date range. Options not in effect as of the visit date are not included in this list.
REASON NOTE/ ENTER LOCATION	Use this field to select a resolution code or the visit location. When using a location related reason code the fields name will change to **ENTER LOCATION.**

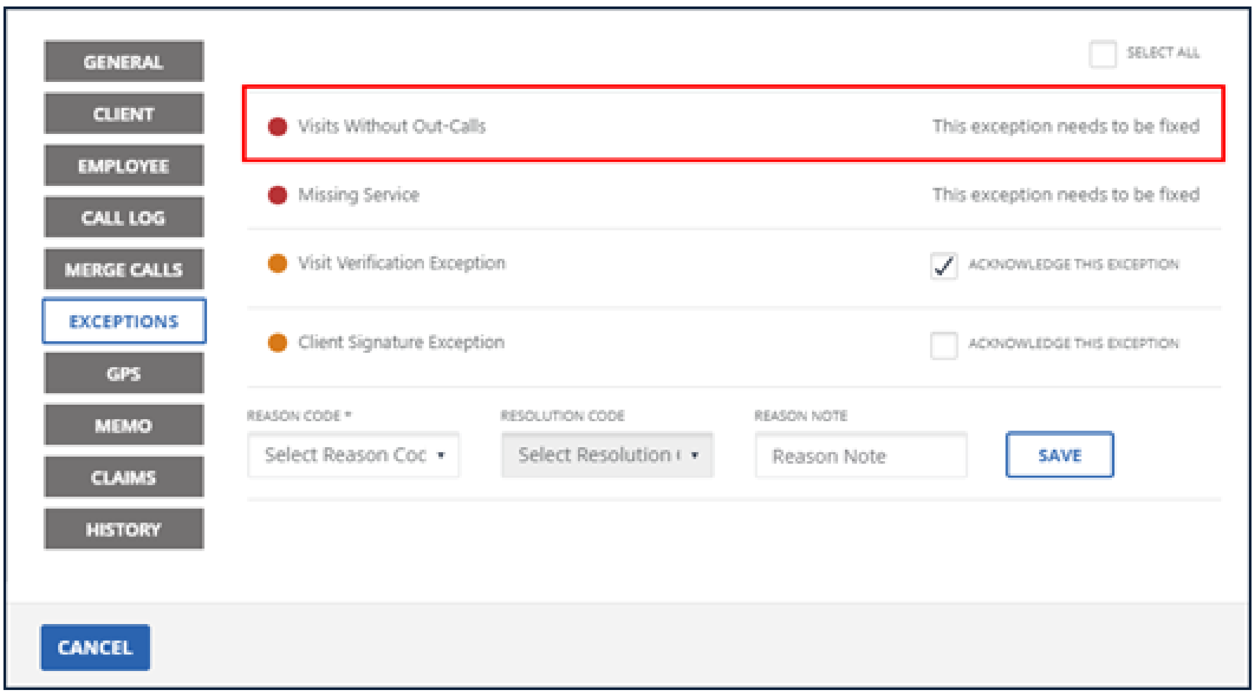
Field	Description
Red Exception 🔴	Indicates an exception must be resolved for the visit.
RESOLUTION CODE	Use this field to indicate how the solution to the visit exception was resolved.
SELECT ALL	Select this checkbox to acknowledge all exceptions displayed.

Managing Exceptions

1. Navigate to the Exceptions section of the Visit Details screen. (**Visit Maintenance** search for and open a visit ( ) > **Exceptions**)

   A. Red Exceptions:

Navigate to the appropriate section of the Visit Details screen to resolve the exception.



Resolving Red Exceptions

B. Orange Exception: (GPS, Visit Verification, Client Signature, Service Verification)

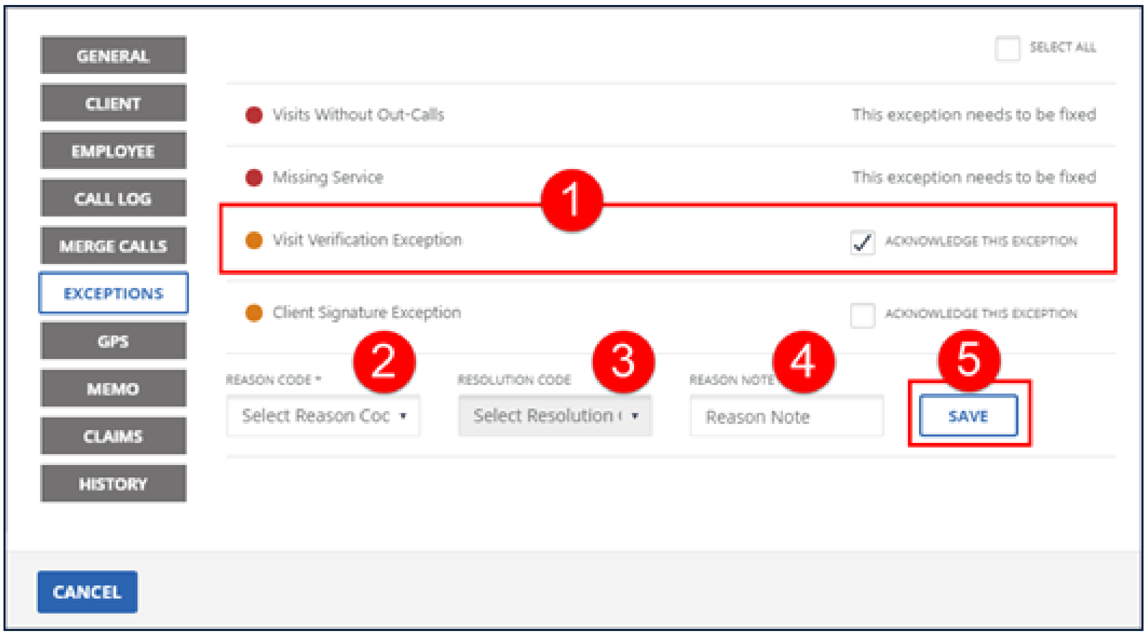
i. Select the **ACKNOWLEDGE THIS EXCEPTION** checkbox.

ii. Select the **REASON CODE**.

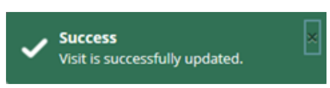
iii. Select the **RESOLUTION CODE**.

iv. Enter a **REASON NOTE**, if applicable.
Use the Reason Note field to add additional information about the visit. Some Reason Codes require a Reason Note.

v. Click **SAVE**.
A notification of confirmation or error displays at the top of the screen.



Resolving Orange Exceptions



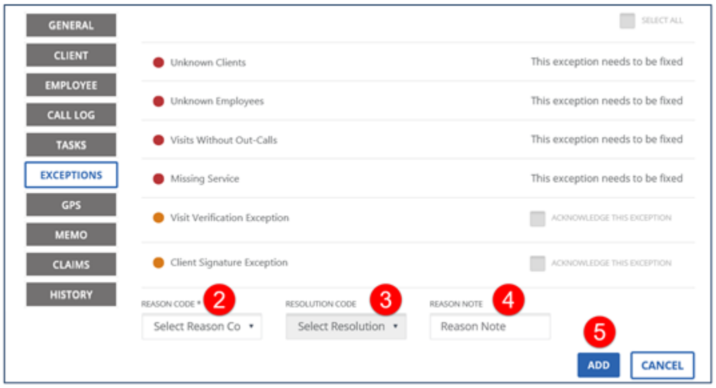
Update Successful Confirmation

C. As needed Exception:

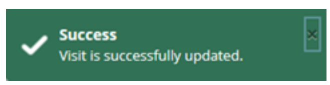
i. Click **ADD REASON CODE.**

Add Reason Code Button

ii. Select the **REASON CODE.**
iii. Select the **RESOLUTION CODE**.
iv. Enter a **REASON NOTE/ENTER LOCATION**, if applicable.
Use the Reason Note field to add additional information about the visit. Some Reason Codes require a Reason Note.
v. Click **ADD.**
A notification of confirmation or error displays at the top of the screen.



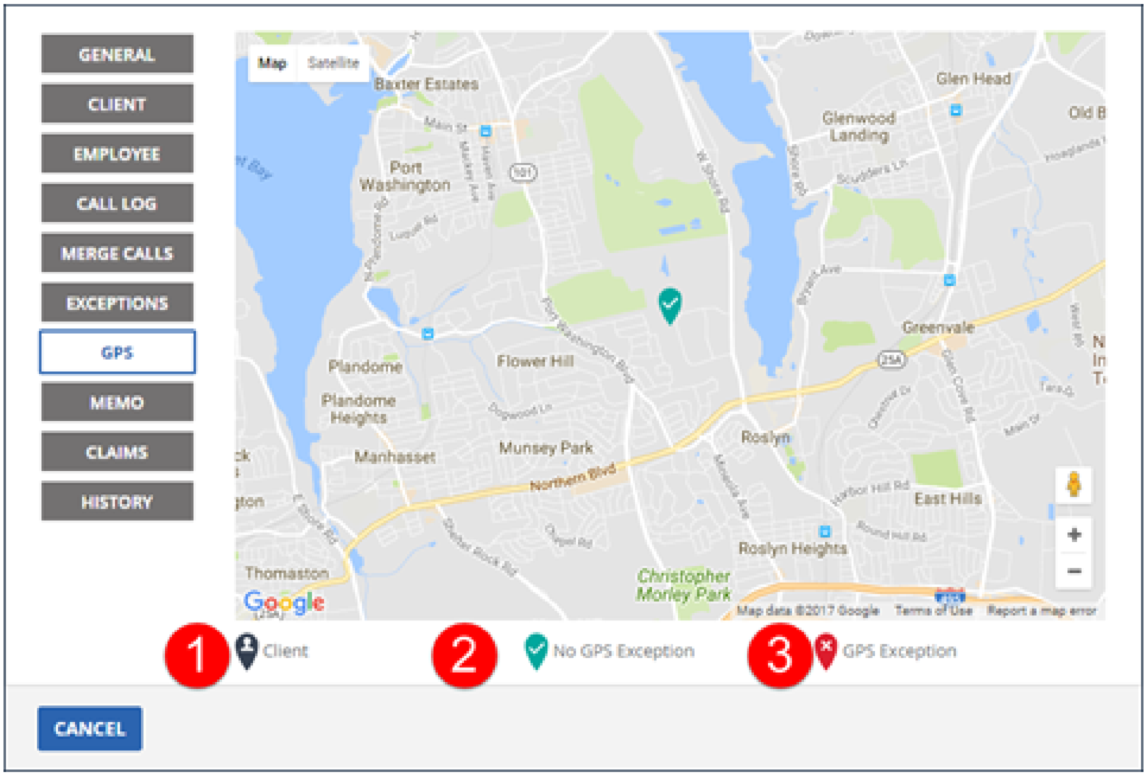
Add Reason Code Button



Update Successful Confirmation

Visit Details Screen – GPS

This section of the Visit Details screen displays the GPS position of the client's addresses and the various calls associated with a visit. This allows users to view the location the call was placed from on a map to ensure the calls are being placed from the proper location. The GPS drop pins may be on top of one another, use the plus and minus (+/-) to zoom in and out in order to see the individual pins. This information is also available using reporting.

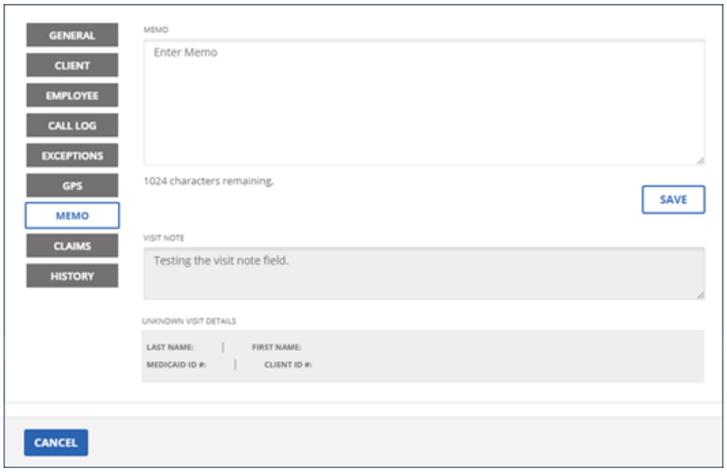


Visit Detail-GPS

Field/Button/Column	Description
Client	Drop pin that displays the client's primary address.
No GPS Exception	Drop pin that indicates that a GPS call (in or out) occurred within range of one of the client's addresses.
GPS Exception	Drop pin that indicates a GPS exception. GPS call (in or out) occurred outside of an acceptable distance from any of the client's addresses.

Visit Details Screen – Memo

The Memos tab shows all memos for the visit. Use the Memo section to enter any additional details about the visit. Visit notes received from Sandata Mobile Connect display in the read only **Visit Note** field. The Unknown Visit Details section displays the information captured by Sandata Mobile Connect when starting an Unknown Visit.

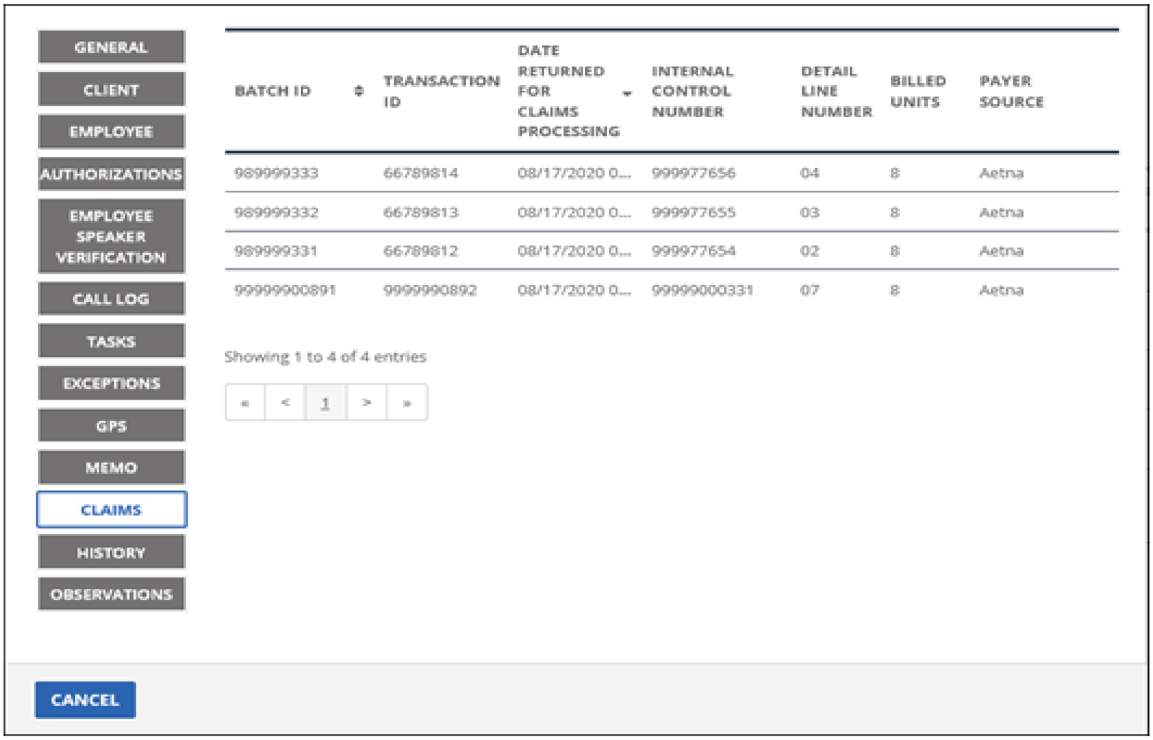


Visit Details - Memo Tab

Field	Description
MEMO	Use this field to record additional notes for the visit.
UNKNOWN VISIT DETAILS	Displays the details entered in the SMC application when an SMC user starts an Unknown Visit.
VISIT NOTE	Displays a read-only Visit Note entered in the Sandata Mobile Connect application.

Visit Details Screen – Claims

The Claims Tab displays information about the Claims Validation interface. Each time a visit is returned to the claims adjudication system, the data is logged and displayed on this screen for reference.



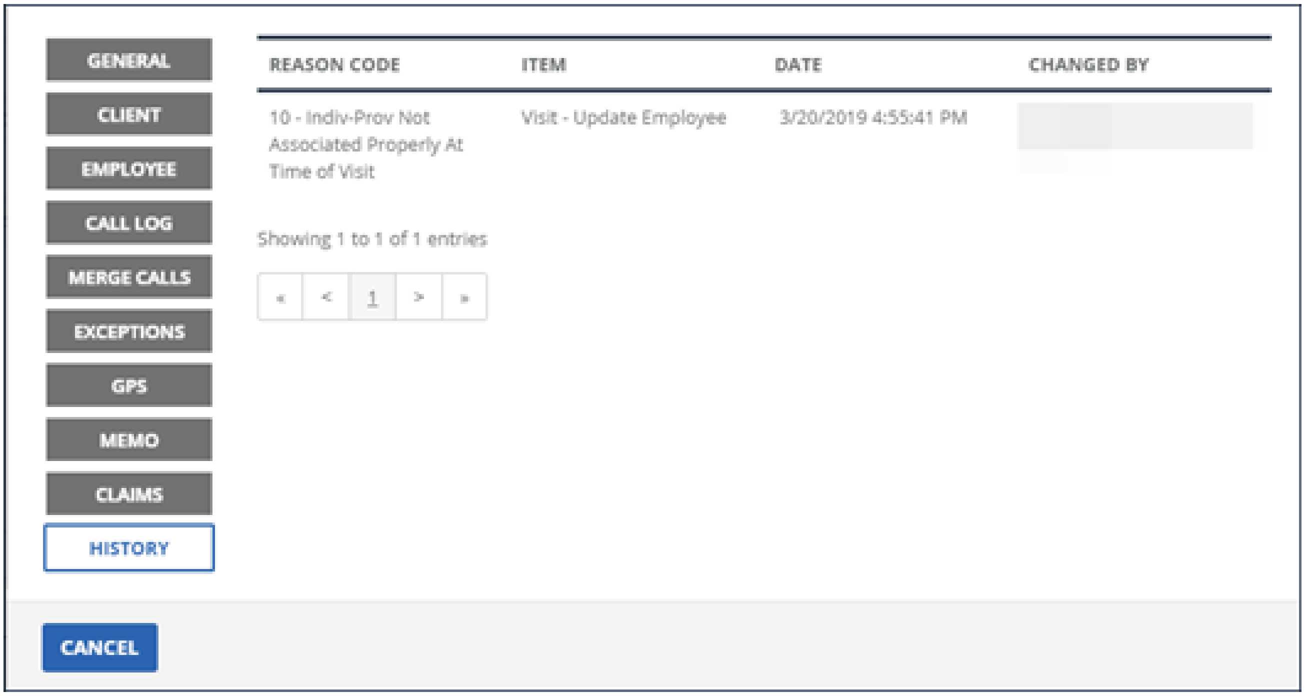
Visit Details – Claims Tab

Field	Description
BATCH ID	An adjudications system's unique number used to identify an individual or a group of claim requests.
BILLED	The number of billed units requested in the claims validation request.
DATE RETURNED FOR CLAIMS PROCESSING	The date the system returned the visit data in response to a claims request made by the payer.
DETAIL LINE NUMBER	The number of billed units calculated for the claims validation request.
INTERNAL CONTROL NUMBER	A unique number assigned to the submitted claim, by the payer's adjudication system.

Field	Description
PAYER SOURCE	The source of the claim request. For programs that receive claims requests from more than one source, this column allows users to identify which payer made the request for the visit as part of their adjudication process.
TRANSACTION ID	A unique number used to identify individual items that are part of a batch.

Visit Details Screen – History

This section of the Visit Details screen displays an abbreviated history of all manual changes made to the visit along with the reason code selected when the change was applied. Additional information about the changes logged on this screen is available using the various reports in the Reports section.



Visit Detail - History

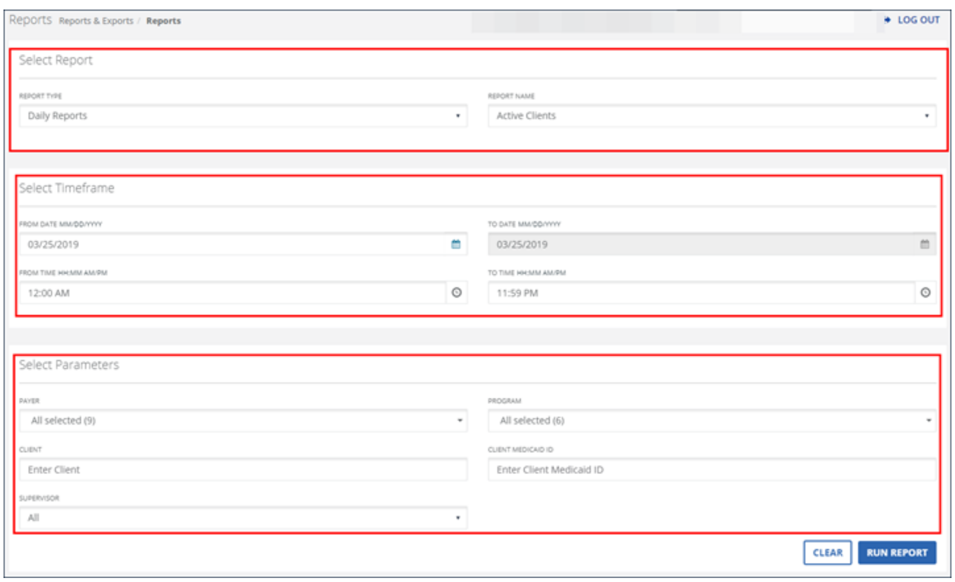
Field/Button/Column	Description
CHANGED BY	Displays the user who made the modification.
DATE	Displays the date the visit was modified.
ITEM	Displays the type of change that was made for the visit.
REASON CODE	Displays the reason code applied when the visit was manually updated. Roll over this field to view the resolution code applied along with the visit note.

Reports & Exports: Reports

Sandata EVV offers a variety of different reports that allow users to review detailed information about clients, employees and visit activity.

Reports are divided into several groups, allowing users to easily locate a specific report. These groups include: alerts, authorizations, billing, daily, date range, FVV and security. Alert reports are used to generate reports regarding specific alerts which are set up for the account, such as no shows. Authorization reports are used to report on authorization data within the system to ensure authorizations are kept up to date. Billing reports include all reports pertaining to billing, allowing users to easily reference billing data. Daily reports are used to return data for one selected day. Date range reports are used to return data for a selected timeframe. FVV reports allow users to reference FVV data about which clients have assigned FVV devices and FVV calls. Security reports allow users to reference system activity, such as logins to the system. Report Types only appear in the drop down if the account is configured to view a report within a group. Some reports have limitations for how large the timeframe can be set, for example 30 days.

Reports offer a variety of parameters allowing users to limit the report output as necessary to return more specific results. Available parameter filters change based on the report selected.



Reports Screen

<u>Export Only Reports</u>

Some reports can only be exported from the system. These reports will display a **RUN EXPORT** button instead of a **RUN REPORT** button. When exporting a report, users are prompted to download a copy of the report to their personal computer, where it can then be reviewed.

Sections of the screen

Based on the report selected the filters available in each section of this screen may vary.

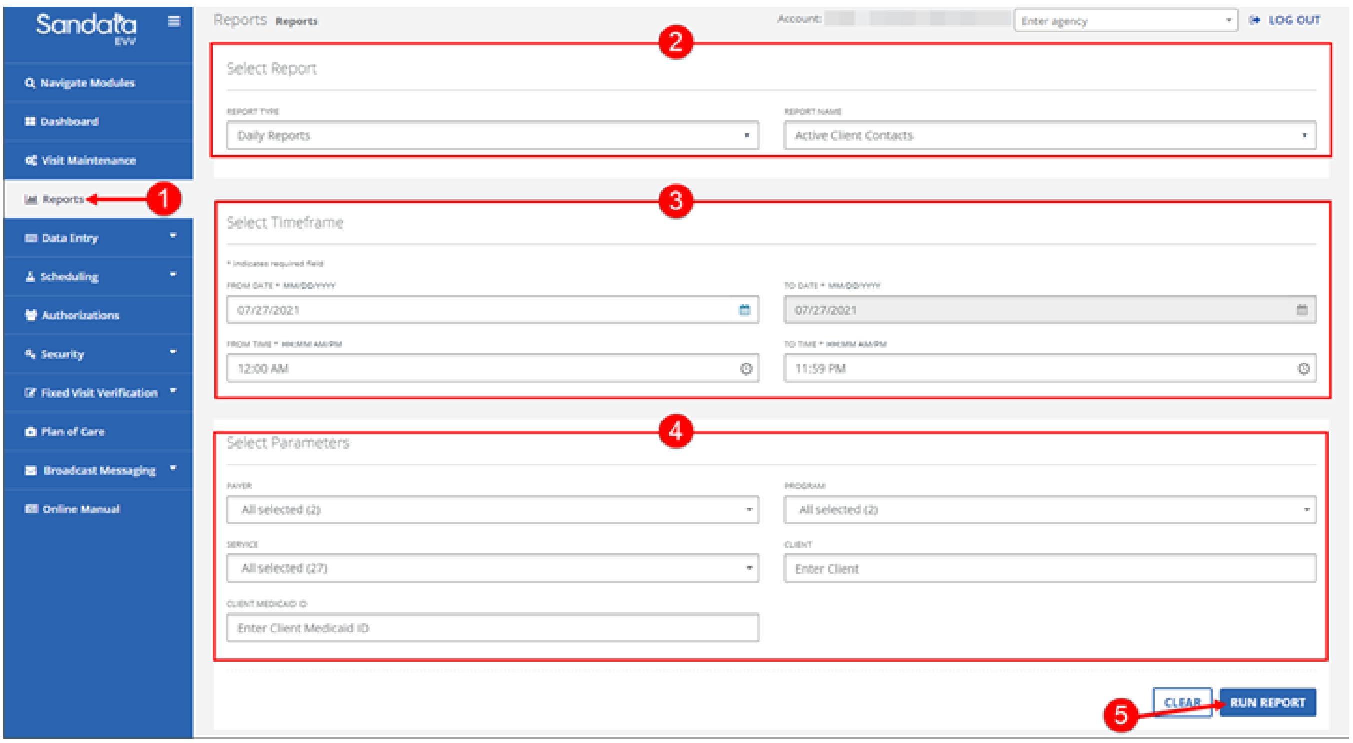
Parts of the Reporting Screen

Filter	Description
Select Report	Select the **Report Type** and **Report Name**. The reports listed in the **Report Name** field change based on the **Report Type** selected. • **Alerts Reports:** These reports display results regarding alerts set up for the account. • **Authorizations:** These reports display result regarding client authorization information. • **Billing Reports:** These reports display result regarding billing transactions. • **Daily Reports:** These reports display results for a selected single date. • **Date Range Reports:** These reports display results for a selected date range. • **Security:** These reports display result regarding system users and account setups.
Select Timeframe	Select the time and/or date range of the reports being run.
Select Parameters	Use the filters in this section to further limit the report output. Example: Payer, Program, Service etc. Parameters available vary by report. In some cases, parameters are required or ranges are limited.

Running a Report

1. Navigate to the Reports screen. (**Reports** > **Reports**)
2. Select the **REPORT TYPE** and **REPORT NAME**.
3. Enter/Select the applicable fields in the Timeframe section.
4. Enter/Select the applicable fields in the Select Parameters section.
5. Click **RUN REPORT**.

Note:
Reports run using longer date ranges or containing lots of data may require the selection of other parameters such as: Client, Employee or Supervisor to reduce the size of the report and ensure efficiency.

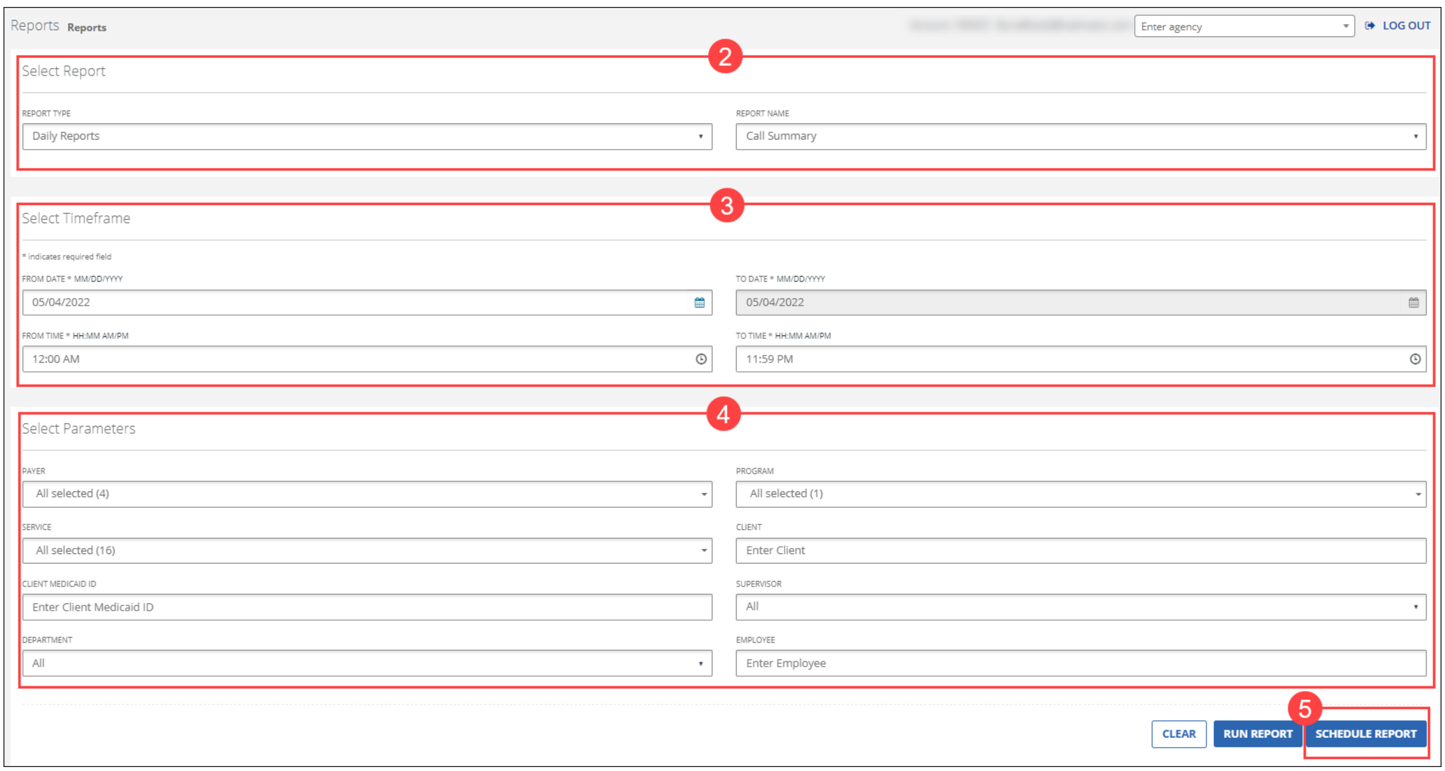


Running a Report

Scheduling a Report

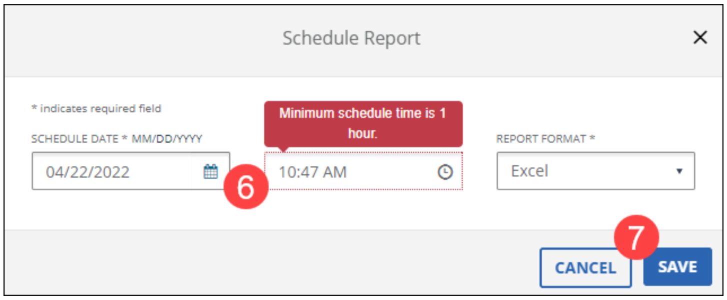
1. Navigate to the Reports screen. (**Reports** > **Reports**)
2. Select the **REPORT TYPE** and **REPORT NAME**.
3. Enter/Select the applicable fields in the Timeframe section.
4. Enter/Select the applicable fields in the Select Parameters section.
5. Click **SCHEDULE REPORT**.

	Note: Reports run using longer date ranges or containing lots of data may require the selection of other parameters such as: Client, Employee or Supervisor to reduce the size of the report and ensure efficiency.



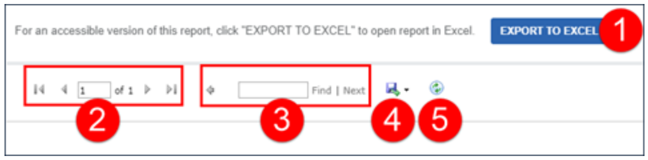
6. Enter/Select the month and time for the report to run.
The minimum reports schedule time is 1 hour.

7. Select the format for the report to be output in.
Click **SAVE**. Scheduled reports are available to download on the Scheduled Reports screen.



Navigating a Report

For accessibility, an **EXPORT TO EXCEL** button at the top of every report allows users to create an Excel output so they are not required to navigate through the default report output.

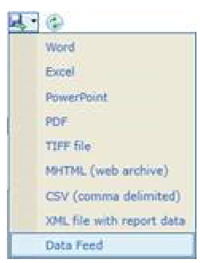


1. **EXPORT TO EXCEL** - This button produces an Excel version of the report. It is formatted to look like the online report with each page break appearing on a different page. It can be sorted, filtered and manipulated in Excel. Excel versions sometimes do not look exactly the same as the printed versions. Depending on the report, the Excel output changes to better accommodate the Excel format.

2. **Page Navigation** - This section displays the current page vs. the total number of pages. Navigate to a specific page by typing a number into the current page field and pressing <**Enter**>. The arrows can be used to navigate to the first, next, previous and/or last page.

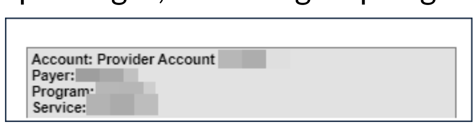
3. **Search Functionality** - Allows you to find data on any page in the report. The **Next** button jumps to the subsequent instance of the search criteria within the document.

4. **Export** - The report can be exported into several formats:
Sandata validates exports to CSV, PDF and Excel. The output format can vary slightly from the default report output.

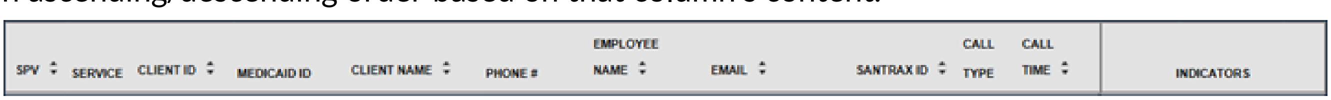


5. **Refresh** - Updates the displayed data with the current data that exists in the system.

6. **Grouping Tab** - Displays at the top of most reports and indicates what information is being used to group results. When the group changes, the new group begins on the next page of the report.



7. **Column Header** - Clicking a column's header, when the arrows are present, will sort the results in ascending/descending order based on that column's content.

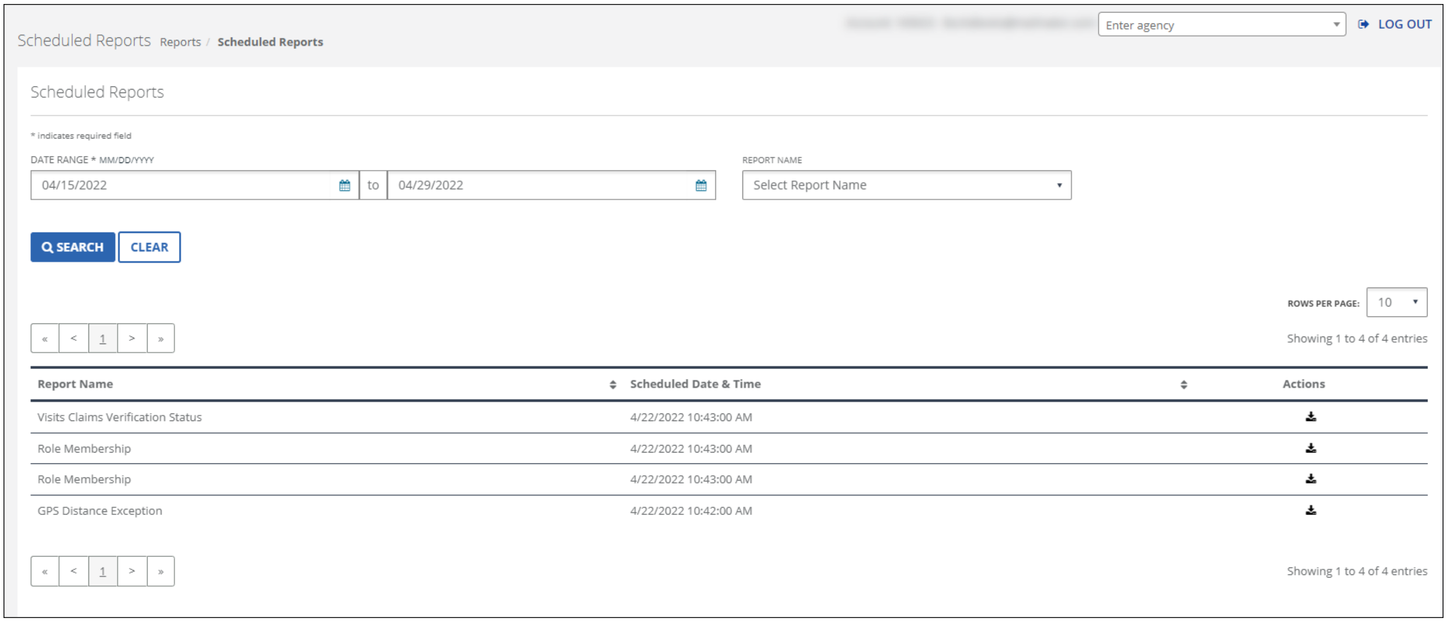


8. **Report Legend page** - The last page of reports displays general information pertaining to the report including icons used.

Icon/Text	Text
	Client ID on call
	Secondary Mutual Client
	Cluster
	Multiple clients with the same phone
	Exported
	Unmatched Client/Phone
	Mobile
	FVV Parent
	The value has been changed
	Incomplete Call
	FVV Call
	FVV Parent
	FVV Attempt
	Manual Call
	Telephony Call
	Employee Voice Recording
	Client Voice Recording
	Employee Speaker Verification - Pass
	Employee Speaker Verification - Fail
	Client Speaker Verification - Pass
	Client Speaker Verification - Fail

Scheduled Reports Screen

The Scheduled Reports screen is used to review reports that are scheduled to run. The screen displays the report names and the scheduled date and time of the report.



Filter	Description
REPORT NAME	Displays the scheduled report name. Clicking this header sorts the reports list in alphabetical order.
SCHEDULED DATE & TIME	Displays the date and time that the report is scheduled to run. Clicking this header sorts the reports list in numeric order by date.
ACTIONS	Click the action button to download the report in Excel or PDF format.

Alerts Reports - Alert Configuration

Description:

This report displays the alert configuration for the account. The report includes information about the type of alert, the thresholds for the when the alerts are sent for each level and information about who the alerts are sent to. If holidays are configured for the account, they are included in the report output. Alert behavior may vary for configured holidays.

Use:

This report can be used to audit the alerts configured to be sent and review the contact the alert is sent to when an in-call for a scheduled visit is not received in a timely manner.

Fields and Columns:

Parameters

This report has no parameters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	The provider agency.

Report Output

Each column of the report displays:

Columns	Description
Holidays	A list of holidays configured for the account.
Alert Type	The type of alert.
Level x: x min(s)	The alert levels and thresholds for the alert.
Recipient	The email address of the contact the alert is sent to.
Name	The name of the contact the alert is sent to.
Username	The username/email address of the contact the alert is sent to.
Contact Type	The type of contact the alert is sent to (e.g. Home e-mail).
Active Buss Hours	Whether the alert should be sent during business hours.
Active Non-Buss Hours	Whether the alert should be sent during non-business hours.
Memo	Any memos for the alert.

Sample Report

Report Parameters
Account: [illegible]
For: 3/17/2021 - 9/30/2021 11:59:59 PM

Alert Configuration

Account: OHIO QA 10011 (10011)

Holidays:
29-APR-21- | 05-JUL-21-Holday In

Alert Type: Santrax			Level 1: 1 min(s)	Level 2: 2 min(s)	Level 3: 3 min(s)	Level 4: N/A	Level 5: N/A
RECIPIENT	NAME	USER NAME		CONTACT TYPE	ACTIVE BUSS HRS	ACTIVE AT NON BUSS HRS	MEMO
[illegible]	[illegible]	[illegible]		Home e-mail	Yes	Yes	[illegible]
[illegible]	[illegible]	[illegible]		Home e-mail 1	No	No	
[illegible]	[illegible]	[illegible]		Office e-mail 2	No	No	[illegible]
[illegible]	[illegible]	[illegible]		Outbound call	No	No	
[illegible]	[illegible]	[illegible]		Mobile phone e-mail 1	No	No	
[illegible]	[illegible]	[illegible]		Outbound call 1	No	No	
[illegible]	[illegible]	[illegible]		Outbound call 2	No	No	
[illegible]	[illegible]	[illegible]		Office e-mail	Yes	Yes	[illegible]

Sandata 09/30/2021 11:34:39 Page 1 of 1

Alert Configuration - Sample

ALERT LISTING

Description:

This report shows a listing of all alerts sent during the selected date range. The report includes information about each alert sent, including the message sent, the recipient, and the date and time of the report.

Use:

Use this report to audit alerts sent and understand whether appropriate processes are in place within an agency when services are not delivered as scheduled.

Fields and Columns:

Parameters

This report has no parameters.

Report Output

Each column of the report displays:

Columns	Description
Date	the date the alert was sent
Time	the time the alert was sent
Alert Sent: Home Email	indicates the type of contact the alert was sent to
Alert Sent: SENT TO:	the email address of the contact the alert was sent to
Alert Sent: Subject	the subject line of the alert that was sent
Alert Sent: Message	the message sent for the alert

Sample Report

Report Parameters
Account:
For: 7/1/2021 - 9/30/2021 11:59:59 PM

Alert Listing Report

DATE TIME (US/EASTERN)	ALERT SENT	
09/17/2021 01:01:20	Office e-mail	
	SENT TO:	
	SUBJECT:	Santrax No Show Notification Level 1 (1 minute no-call alert) for Account:10011 SPV: Generated:01:01 Sep 17,'21
	MESSAGE:	866136 admira, a (0**)549-8651 user test, admira 000776879 01:00
09/17/2021 01:04:20	Office e-mail	
	SENT TO:	
	SUBJECT:	Santrax No Show Notification Level 2 (3 minute no-call alert) for Account:10011 SPV: Generated:01:04 Sep 17,'21
	MESSAGE:	866136 admira, a (0**)549-8651 user test, admira 000776879 01:00

Sandata 09/30/2021 11:46:27 Page 2 of 2

Alert Listing Report - Sample

No Show

Description:

This report shows all missed scheduled visits occurring during a selected date range. The report provides the visit information including the client's name and contact information, the field staff member and their employee information. The maximum date range for this report is 730 days.

Use:

This operational report can be used throughout the day by agency employees to monitor field activity. Use this report to review any missed visits (no shows), occurring during a specific time frame. Use this report as an alternative to now show alerts to view current day activity and visits that need attention. The report can be filtered for a specific client or employee to identify trends. This report can be run for a single day.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Output

Each column of the report displays:

Columns	Description
Payer	the payer for the visit
Program	the program(s) for the visit
Service	the service performed for the visit

Sample Report

Columns	Description
Supervisor	the client's supervisor at the provider agency
Client: ID	the Sandata client ID
Client: Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Client: Name	the client's name
Client: Phone	the client's primary phone number
Client: Priority	the client's priority, indicated by a numeric value if it has been established for the program
Employee: Name	the employee's name
Employee: Sandata ID	the employee's Sandata ID
Employee: ID	the employee ID
Scheduled Start Time	the scheduled start time for the visit
Possible Call Time	a system identified call (telephony) that could be associated with the visit
Grand Total of No Shows	the grand total of no shows

Sample Report

Report Parameters

Account: Provider [redacted]

For: 9/15/2020 - 9/16/2020 11:59:59 PM

No Show Report

Account: [redacted]

Provider Medicaid ID: None

				CLIENT					EMPLOYEE			SCHEDULED	POSSIBLE
PAYER	PROGRAM	SERVICE	SUPERVISOR	ID	MEDICAID ID	NAME	PHONE	PRIORITY	NAME	SANTRAX ID	ID	START TIME	CALL TIME
[redacted]	[redacted]	[redacted]		306130	583045834095	Bacon, James			Abigail, Joel	555999		13:00	
[redacted]	[redacted]	[redacted]		803291	490823409283	Botsman, Scott			Frank, Aidan	866985		14:00	
[redacted]				358426	429038423094	Barnett, Gary			Darcie, Theresa	991841		15:00	
Grand Total of No Shows: 3													

Alert No Show Report-Sample

Clients without Authorizations

Description:

This report displays a listing of all clients that do not have an authorization as of the selected date. Clients with one or more authorizations active as of the selected date do not appear on this report. This report is only available when Authorization functionality is enabled. Authorizations are generally received from a payer using an interface.

Use:

This report allows users to review all clients that do not have a current authorization to identify where the appropriate actions to end services or obtain an authorization from the payer are required. While a client can have multiple authorizations, based on service, this report only displays clients without any authorizations as of the selected date.

Fields and Columns:

Parameters

This report has no parameters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break:

Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report displays:

Columns	Description
Client Name	the client's name
ID Type	the type of identifier displayed on the report for the client (M = Medicaid ID, P = Payer ID, C=Client ID, N=Newborn)
Medicaid/Payer ID	the client's identifier based on the ID Type specified
Authorization Expired	the date the client's authorization expired This field is blank if the client has not had an authorization.

Sample Report

Report Parameters
Account: Provider Account
As of Date: 10/21/2020

Clients Without Authorizations - Agency

Account: [redacted]

CLIENT NAME	ID TYPE	MEDICAID / PAYER ID	AUTHORIZATION EXPIRED
Kelly, Yoens	M	798721983721	01/20/2020
Wrangla, Karen	M	890318230918	
Powers, Sarah	M	524354336765	
Bacon, James	M	583045834095	09/30/2020
Barnett, Gary	M	429038423094	
Wells, Tiffany	M	492084032948	
Finnez, Ramona	M	317236248763	01/20/2020
McDonald, Rick	M	423409283409	
Barnridge, Amanda	M	371298372139	
Botsman, Scott	M	490823409283	
Mann, Sumner	M	482342340928	01/20/2020

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Clients Without Authorizations - Sample

Expiring Authorizations

Description:

This report displays a listing of authorizations that will expire within 31 days of the selected date.

Use:

This report allows users to review all expiring authorizations and quickly determine which authorizations require action to either end services or obtain an updated or new authorization for the client. It is best practice to run this report for the current date to identify authorizations that will be expiring.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client AR#	the client's Account Receivable (AR) number

Report Grouping Tab

Field	Description
Account	the provider agency's Sandata EVV account number

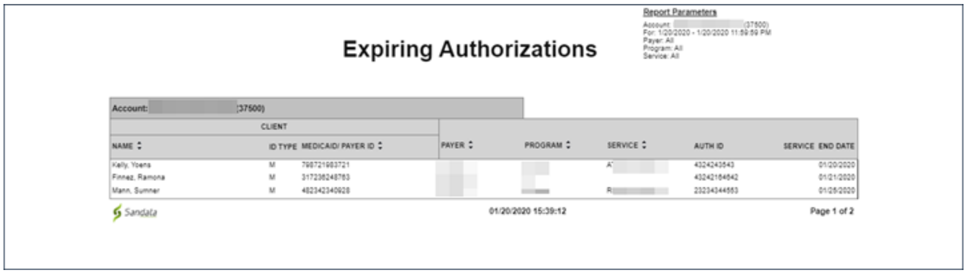
Report Output

Each column of the report displays:

Columns	Description
Client: Name	the client's name
Client: ID Type	the type of identifier displayed on the report for the client (M = Medicaid ID, P = Payer ID, C=Client ID, N=Newborn)
Client: Medicaid/Payer ID	the client's identifier based on the ID Type specified
Payer	the authorization's payer
Program	the authorization's program
Service	the authorization's service
Auth ID	the authorization's reference ID number provided by the payer

Columns	Description
Service End Date	the end date for the authorization's service

Sample Report



Expiring Authorizations

Report Parameters
Account: (37500)
For: 1/20/2020 - 1/20/2020 11:59:59 PM
Payer: All
Program: All
Service: All

Account: (37500)

CLIENT							
NAME	ID TYPE	MEDICAID/ PAYER ID	PAYER	PROGRAM	SERVICE	AUTH ID	SERVICE END DATE
Kelly, Yoens	M	798721983721			A	4324243543	01/20/2020
Finnez, Ramona	M	317236248763				43242164642	01/21/2020
Mann, Sumner	M	482342340928			R	23234344553	01/26/2020

01/20/2020 15:39:12
Page 1 of 2

Expiring Authorizations – Sample

Visit Claims Verification

Description:

This report displays all visits within the selected date range and shows the last time each visit was returned to the payer for validation.

Use:

Use this report to track the status of visits relative to claims validation. It can be used to review when a particular visit was returned to the adjudicating system.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	visits for the selected payer(s)
Program	visits for the selected program(s)
Service	visits for the selected service(s)
Client Medicaid ID	visits for the client's Medicaid ID
Supervisor	visits for the selected supervisor at the provider agency
Visit Status	visits for the selected visit status

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account:	the selected provider
Provider Medicaid ID:	the provider's Medicaid ID and/or Alternate Medicaid ID

Report Output

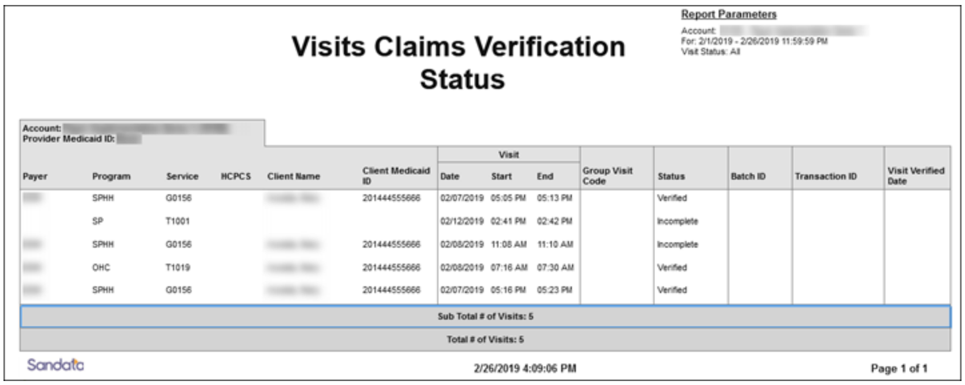
Each column of the report displays:

Columns	Description
Payer	the payer for the related visit
Program	the program(s) fir the visit
Service	the service performed for the visit
HCPCS	the HCPCS code used for billing
Client Name	the client name Blank if unknown
Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as “N”.

Sample Report

Columns	Description
Visit Date/Start/End	the date, start time and end time of the visit
Group Visit Code	the group visit code associated with the visit, if applicable
Status	the status of the visit
Batch ID	Currently Unavailable
Transaction ID	Currently Unavailable
Visit Verified Date	Currently Unavailable

Sample Report



Visits Claims Verification Status

Report Parameters
Account:
For: 2/1/2019 - 2/26/2019 11:59:59 PM
Visit Status: All

Account:
Provider Medicaid ID:

Payer	Program	Service	HCPCS	Client Name	Client Medicaid ID	Visit Date	Visit Start	Visit End	Group Visit Code	Status	Batch ID	Transaction ID	Visit Verified Date
	SPHH	G0156			201444555666	02/07/2019	05:05 PM	05:13 PM		Verified			
	SP	T1001				02/12/2019	02:41 PM	02:42 PM		Incomplete			
	SPHH	G0156			201444555666	02/08/2019	11:08 AM	11:10 AM		Incomplete			
	OHC	T1019			201444555666	02/08/2019	07:16 AM	07:30 AM		Verified			
	SPHH	G0156			201444555666	02/07/2019	05:16 PM	05:23 PM		Verified			
Sub Total # of Visits: 5													
Total # of Visits: 5													

Sandata 2/26/2019 4:09:06 PM Page 1 of 1

Visit Claims Verification Status

Claims Validation Rejection

Description:

This report shows all claims validation requests that were returned unsuccessfully by the Sandata's Claims Validation system. The report shows the request including the error message returned.

Use:

Use this report to quickly identify claims where matching EVV information was not found. This can assist in identifying visits that require action so they can be resubmitted to the claims validation system.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	visits for the selected payer(s)
Program	visits for the selected program(s)
Service	visits for the selected service(s)

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number
Provider	the state assigned identifier for the prover (e.g Provider Medicaid ID)

Report Output

Each column of the report lists:

Columns	Description
Received	the date the claim was received by Sandata Claims Validation
Batch ID	the batch ID number for the claims validation request
Trans ID	the transaction ID number for the claims validation request
Invoice Control NO	the invoice control number for the claims validation request
Line NO	the line number within the invoice
Client ID	the Sandata client ID
Visit Range	the date range for the claim where the visits were reviewed
Payer	the payer for the claim line
Program	the program for the claim line

Sample Report

Columns	Description
Service	the service for the claim line
Bill Unit	the billable units for the claim line. This reflects the total billing requested for the date range
Exception	the information returned for the failed claims request
Provider Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Client Name	the client's name. Blank if unknown.
Units Found	the total billable units for all visits found matching the request criteria
Visits	the number of visits found which were reviewed for the claims request

Sample Report

Report Parameters
Account:
For: 6/24/2021 - 6/24/2021 11:59:59 PM

Claims Validation Rejection

Account:
Provider: 9021099

RECEIVED	BATCH ID	TRANS ID	INVOICE CONTROL NO	LINE NO	CLIENT ID	VISIT RANGE	PAYER	PROGRAM	SERVICE	BILL UNITS	EXCEPTION	PROVIDER MEDICAID ID	CLIENT MEDICAID ID	CLIENT NAME	UNITS FOUND	VISITS
6/24/2021 11:40:54 AM	303952208194	303952208194	303952208194	01		06/24/2021 06/24/2021			T1000	5	2 - No visit found	9021099	999999994848		5	0
6/24/2021 12:18:10 PM	2021062412171489	2021062412171489	99911219110	47		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:10 PM	2021062412222278	0624120192221	0624120192221	49		11/01/2019 11/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:10 PM	2021062412222278	0624120192221	0624120202221	49		11/01/2019 11/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:10 PM	2021062412222278	0624120202221	0624120212221	49		11/01/2019 11/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:27 PM	2021062412242712	2021062412242712	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:27 PM	2021062412242764	2021062412242764	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:28 PM	2021062412242854	2021062412242854	99911219110	04		11/01/2019 11/01/2019			G0156	10	2 - No visit found	9021099	608155734		10	0
6/24/2021 12:24:29 PM	2021062412242892	2021062412242892	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:29 PM	2021062412242932	2021062412242932	99911219110	04		12/01/2019 12/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:30 PM	2021062412243009	2021062412243009	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:30 PM	2021062412243048	2021062412243048	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:31 PM	2021062412243094	2021062412243094	99911219110	04		11/01/2019 11/01/2019			G0156	10	2 - No visit found	9021099	608155734		10	0
6/24/2021 12:24:31 PM	2021062412243129	2021062412243129	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:31 PM	2021062412243165	2021062412243165	99911219110	04		12/01/2019 12/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:26:10 PM	2021062412241342	2021062412241342	99911219110	47		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:28:10 PM	20210624122618794	0624129692621	0624129702621	47		01/02/2019 01/02/2019			G0299	8	2 - No visit found	9021099	811111111119		8	0
6/24/2021 12:30:10 PM	20210624122815506	0624127662821	0624127662821	47		01/01/2019 01/01/2019			T1001	1	2 - No visit found	9021099	118846863960		1	0

Sandata 09/07/2021 16:54:49 Page 1 of 1

Claims Validation Rejection - Sample

Active Client Contacts

Description:

This report displays all contacts and designees associated with a client.

Use:

This report is used to review the current state of a client's contacts and designees. Contacts are for reference only, but designees may have privileges to use the system on behalf of the client. This report helps the responsible entity manage client designees to ensure that access is not permitted if it is not appropriate. If the current system configuration does not support designees, only contacts are displayed on this report.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.

Report Output

Each column of the report displays:

Columns	Description
Account	the provider agency's Sandata EVV account number
Account Name	the account name
Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Contact: Type	the type of contact (e.g. Contact or Designee)
Contact: Relationship	the relationship of the emergency contact to the client
Contact: Name	the name of the client's emergency contact
Contact: Email	the email address of the client's emergency contact

Sample Report

Report Parameters
Account:
For: 1/16/2020 - 1/16/2020 11:59:59 PM

Active Client Contacts

				CONTACT			
ACCOUNT	ACCOUNT NAME	CLIENT NAME	MEDICAID ID	TYPE	RELATIONSHIP	NAME	EMAIL
37500		Bacon, James	583045834095	CONTACT	Spouse	Bacon, Chris	ChrisPBacoN@mailinator.com
37500		Barnett, Gary	429038423094	CONTACT	Sibling	Barnett, Joanie	JoeyBBB@mailinator.com
37500		Barnridge, Amanda	371298372139	CONTACT	Parent	Barnridge, James	JBARNZ@mailinator.com
37500		Botsman, Scott	490823409283	CONTACT	Sibling	Botsman, Rossana	ROBOTSm@mailinator.com
37500		Finnez, Ramona	317236248763	CONTACT	Child	Finnez, Ramone	SharkFinHat@mailinator.com
37500		Kelly, Yoens	798721983721	CONTACT	Friend	Ottovan, Stanley	slotto72902@gmail.com
37500		Mann, Sumner	482342340928	CONTACT	Other	Muffin, Max	mmffin7891@gmail.com
37500		McDonald, Rick	423409283409	CONTACT	Friend	Ortega, Tito	torg@torga.org
37500		Powers, Sarah	524354336765	CONTACT	Spouse	Powers, Samuel	spowers@orangetree.net
37500		Wells, Tiffany	492084032948	CONTACT	Sibling	Wells, Rex	rwells@trex.net
37500		Wrangla, Karen	890318230918	CONTACT	Child	Wrangla, Gary	gwrangler@wrangla.com

Sandata 01/16/2020 15:59:44 Page 1 of 1

Active Client Contacts - Sample

Active Clients

Description:

This report lists all active clients and information from the client's profile including: Santrax ID, name, phone number, city and zip.

Use:

This report provides an overview of all active clients.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Client	client by name (last name, first name) When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report displays:

Columns	Description
Client ID	the Sandata client ID
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Name	the client's name
Client SSN	the client's social security number
Phone #	the client's primary phone number

Columns	Description
Address	the client's primary street address (line 1)
City	the city from the client's primary address
St	the state from the client's primary address
Zip	the zip code from the client's primary address
Latitude	the latitude of the client's primary address
Longitude	the longitude of the client's primary address
Client Alternate ID	the value entered in the client's Other ID field

Sample Report

Report Parameters
Account:
For: 10/20/2020 - 10/20/2020 11:59:59 PM

ACTIVE CLIENTS

Account:

CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	CLIENT SSN	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE ID
236149	798721983721	Kelly, Yoens			9837 Forest CT	Deadham	MA	02026-0000	42.24946140	-71.18049880	
246539	890318230918	Wrangla, Karen			2389 State St	Detroit	MI	48205-0000	42.42907719999999	-82.97703709999999	
285102	524354336765	Powers, Sarah			39208 Clinton Dr	Forest City	IA	50436-0000	43.26641050	-93.63490290	
306130	583045834095	Bacon, James			389 Point Place	Forest City	IA	50436-0000	43.26246850	-93.63719370	
358426	429038423094	Barnett, Gary			21 B St	Forest City	IA	50436-0000	43.25853430000001	-93.63874810	
437295	492084032948	Wells, Tiffany			290 King Court	Clinton Twp	MI	48038-0000	42.60370830	-82.95602240	
538777	317236248763	Finnez, Ramona			8937 Plaza Point	Yorktown Heights	NY	10598-0000	41.27092740	-73.77763360	
692839	423409283409	McDonald, Rick			20113 Lamont Dr	Clinton Twp	MI	48038-0000	42.59765880	-82.93940020	
762392	371298372139	Bamridge, Amanda			372392 Waverly	Sebastian	FL	32958-0000	27.79549930	-80.48826720	
803291	490823409283	Botsman, Scott			9282 Way Place Apt C	Seattle	WA	98144-0000	47.58467569999999	-122.303649	
960968	482342340928	Mann, Sumner			2489 Baggar Lane	Summerville	SC	29483-0000	32.97142590	-80.17587189999999	
987456	555222888999	Miller, Bobby			26 Harbor Park Drive	Port Washington	NY	11070-0000	40.81072380	-73.66369209999999	

Grand Total of Active Clients: 12

Sandata **10/20/2020 13:11:58** **Page 1 of 1**

Active Clients- Sample

Active Employees

Description:

This report displays all the employees for the selected date. The report displays the employee ID, employee name, employee email address, phone number and Santrax ID.

Use:

Use this report to review current employee information.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report displays:

Columns	Description
Employee ID	the employee ID
Employee Name	the employee's name
Employee Email	the employee's email address
Employee Santrax ID	the employee's Santrax ID
Employee SSN	the employee's social security number
Phone #	the employee's phone number
Dep	the employee's department Depending on the agency's specific configurations, this field may display a different value.
SV Enrolled?	indicates if the employee is enrolled in Speaker Verification (Y – Yes, N – No)

Sample Report

Report Parameters
Account:
For: 10/20/2020 - 10/20/2020 11:59:59 PM

ACTIVE EMPLOYEES

Account: Provider Account

EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	EMPLOYEE SSN	PHONE #	DEP	SV ENROLLED?
-	Abigail, Joel	SMCTESTING899@MAILINATOR.COM	555999	***-*8-7123	-	-	N
-	Carter, Julie	MISTERTESTY@MAILINATOR.COM	235895	***-*7-2149	(516)484-4400	-	N
-	Darcie, Theresa		991841	***-*4-5901	-	-	N
-	Frank, Aidan		866985	***-*2-9820	-	-	N
-	Hatten, Jim		891353	***-*1-4589	-	-	N
-	Lowri, Kelley		100255	***-*8-1345	-	-	N
-	Osborne, Santiago		612250	***-*4-6123	-	-	N
-	Ruby, Craig		284763	***-*2-8643	-	-	N
-	Salazar, Max		660887	***-*1-5476	-	-	N
51236	Testerwiak, Ezekial		186320	***-*9-7712	-	DEV	N
-	Willis, Ashley		181841	***-*6-9101	-	-	N
-	Wilson, Kimberly		202991	***-*6-1430	-	-	N
Total of Employees:	12						

Sandata 10/20/2020 13:30:28 Page 1 of 1

Active Employees – Sample

Agency Master Schedule

Description:

This report provides a comprehensive list of all scheduled visits for the selected date-range.

Use:

This report lists all scheduled visits with a start date that falls within the selected date-range.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

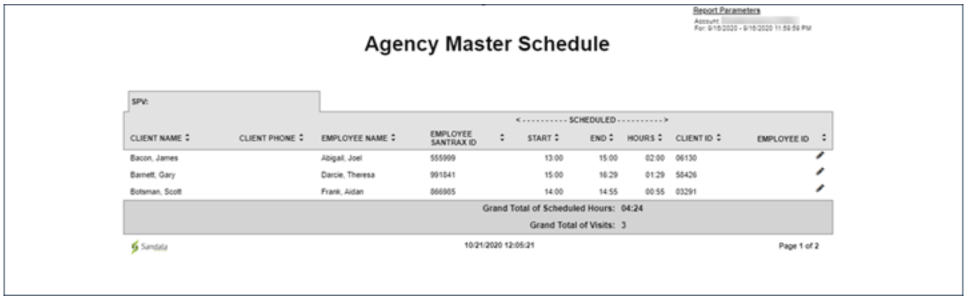
Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client AR#	the client's Account Receivable (AR) number
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Output

Each column of the report displays:

Columns	Description
Client Name	the client's name
Client Phone	the client's primary phone number
Employee Santrax ID	the employee's Santrax ID
Start	the scheduled start time for the visit
End	the scheduled end time for the visit
Hours	the total hours scheduled for the visit
Client ID	the Sandata client ID
Employee	the employee ID

Report Sample



Report Parameters

Account:

For: 9/16/2020 - 9/16/2020 11:59:59 PM

Agency Master Schedule

SPV:

CLIENT NAME	CLIENT PHONE	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	START	END	HOURS	CLIENT ID	EMPLOYEE ID
				<---------- SCHEDULED		---------->		
Bacon, James		Abigail, Joel	555999	13:00	15:00	02:00	06130	
Barnett, Gary		Darcie, Theresa	991841	15:00	16:29	01:29	58426	
Botsman, Scott		Frank, Aidan	866985	14:00	14:55	00:55	03291	

Grand Total of Scheduled Hours: 04:24

Grand Total of Visits: 3

Sandata 10/21/2020 12:05:21 Page 1 of 2

Agency Master Schedule – Sample

Available Task List

Description:

This report shows the list of tasks available for the account as well as general information about each available task as of the day the report was run.

Use:

Use this review information about the tasks available for the account, including which tasks are designated as critical and which tasks allow for a reading to be entered (e.g. weight). Users can validate the task configuration of the account with this report and it may also be used t o update field staff in the event that tasks or added or removed over time.

Fields and Columns:

Parameters

This report has no parameters.

Report Output

Each column of the report displays:

Columns	Description
Task ID	the identifier for the task
Task Name	the name of the task
Critical Task	N=No or Y=Yes, indicating whether or not the task is critical
Reading	N=No or Y=Yes, indicating whether a reading is required for the task
Minimum Amount	the minimum value that must be entered for this task's reading, if configured
Maximum Amount	the maximum value that may be entered for this task's reading, if configured
Units	the units for the task if applicable based on the task configuration

Sample Report

Report Parameters
Account:
For: 3/18/2021 - 3/18/2021 11:59:59 PM

Available Task List

TASK ID	TASK NAME	CRITICAL TASK	READING	MINIMUM AMOUNT	MAXIMUM AMOUNT	UNITS
0001	Oral temperature	N	N			
0002	Weight	N	Y	0	60	
0003	Shower	N	N			
1111	Patient refused Personal Care	N	N			
1231	Corrected Mileage	N	Y			m
1234	AutoMileage from previous visit	N	Y			m
5455	Corrected Mileage	N	Y			m
6545	AutoMileage from previous visit	N	Y			m

Sandata 03/18/2021 14:20:50 Page 1 of 1

Available Task List - Sample

Call Listing

Description:

This report displays all calls that were made to Santrax EVV phone numbers for the date and time range that was specified when selecting the report. The calls are listed one after another individually with the beginning pages listing the unknown calls.

Use:

This report is used to review calls.

Field and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number
Payer	the payer
Program	the program

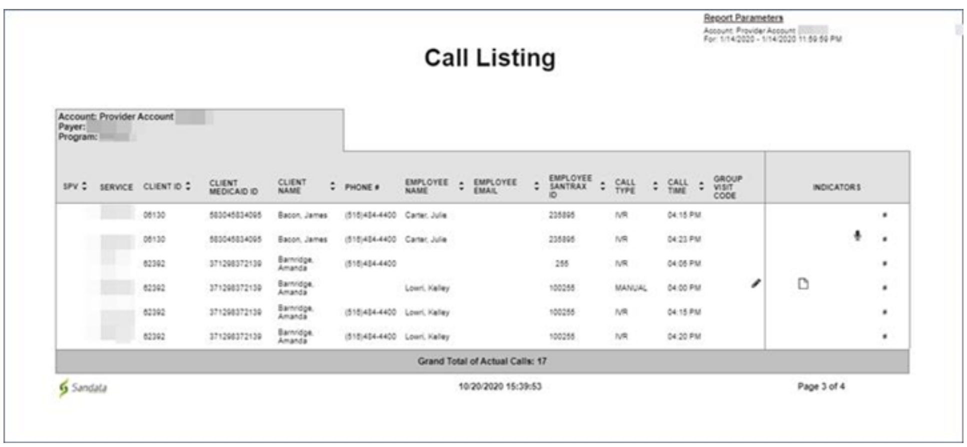
Report Output

Each column of the report displays:

Columns	Description

SPV	the supervisor assigned to the employee
Service	the service performed for the call
Client ID	the Sandata client ID
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Name	the client's name
Phone #	the client's primary phone number
Employee Name	the employee's name
Employee Email	the employee's email address
Employee Santrax ID	the employee's Santrax ID
Call Type	the call type for the visit
Call Time	the time of the visit
Group Visit Code	the group visit code associated with the visit
Indicators	an icon representing call functionality used for the call (see Legend)
Grand Total of Actual Calls	the grand total of calls

Sample Report


Report Parameters
Account: Provider Account
For: 1/14/2020 - 1/14/2020 11:59:59 PM

Call Listing

Account: Provider Account
Payer:
Program:

SPV	SERVICE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	CALL TYPE	CALL TIME	GROUP VISIT CODE	INDICATORS
		06130	583045834095	Bacon, James	(518)484-4400	Carter, Julie		235895	IVR	04:15 PM		
		06130	583045834095	Bacon, James	(518)484-4400	Carter, Julie		235895	IVR	04:23 PM		
		62392	371298372139	Barnridge, Amanda	(518)484-4400			255	IVR	04:06 PM		
		62392	371298372139	Barnridge, Amanda		Lowri, Kelley		100255	MANUAL	04:00 PM		
		62392	371298372139	Barnridge, Amanda	(518)484-4400	Lowri, Kelley		100255	IVR	04:15 PM		
		62392	371298372139	Barnridge, Amanda	(518)484-4400	Lowri, Kelley		100255	IVR	04:20 PM		

Grand Total of Actual Calls: 17

Sandata 10/20/2020 15:39:53 Page 3 of 4

Call Listing - Sample

Call Summary

Description:

This report pairs the Start and End calls together and calculates the hours worked.

Use:

Use this report to review current visit information on a daily basis and identify the incomplete visits from the previous day that need follow up.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number
Payer	the payer
Program	the program

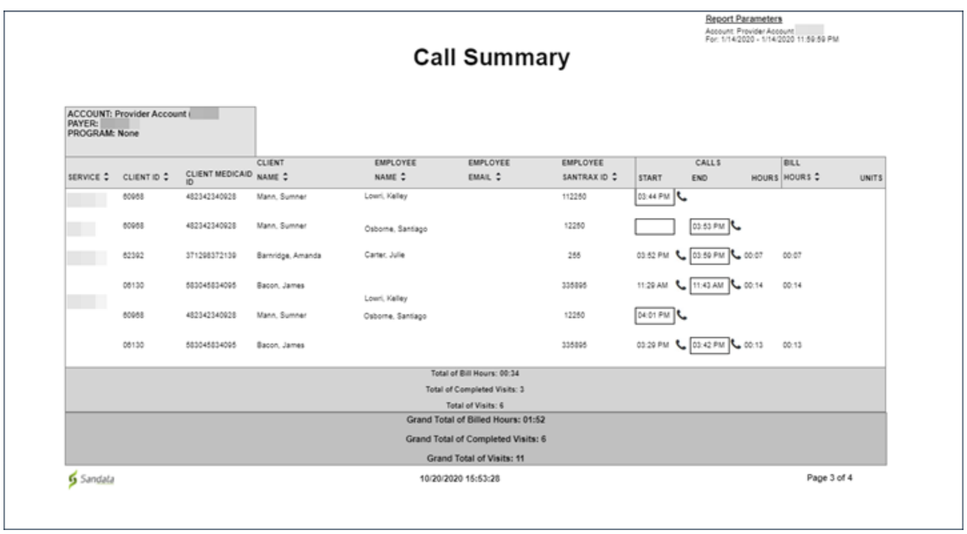
Report Output

Each column of the report displays:

Columns	Description
Service	the service performed for the call

Columns	Description
Client ID	the Sandata client ID
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Name	the client's name
Employee Name	the employee's name
Employee Email	the employee's email address
Employee Santrax ID	the employee's Santrax ID
Call: Start	the actual or manually entered start time for the visit If no adjustment was made, the actual start time displays.
Call: End	the actual or manually entered end time for the visit If no adjustment was made, the actual end time displays.
Call: Hours	the calculated duration for the visit in hours
Bill: Hours	the billable hours for the call
Bill: Units	the billable units for the call
Total of Bill Hours	the total billable hours
Total of Completed Visits	the total number of completed visits
Total of Visits	the total number of visits
Grand Total of Billed Hours	the grand total of billable hours
Grand Total of Completed Visits	the grand total of completed visits
Grand Total of Visits	the grand total of visits

Sample Report



Report Parameters
Account: Provider Account
For: 1/14/2020 - 1/14/2020 11:59:59 PM

Call Summary

ACCOUNT: Provider Account
PAYER:
PROGRAM: None

SERVICE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	CALLS START	CALLS END	CALLS HOURS	BILL HOURS	UNITS
	60968	482342340928	Mann, Sumner	Lowri, Kelley		112250	03:44 PM				
	60968	482342340928	Mann, Sumner	Osborne, Santiago		12250		03:53 PM			
	62392	371298372139	Barnridge, Amanda	Carter, Julie		256	03:52 PM	03:59 PM	00:07	00:07	
	06130	583045834095	Bacon, James			335895	11:29 AM	11:43 AM	00:14	00:14	
	60968	482342340928	Mann, Sumner	Lowri, Kelley Osborne, Santiago		12250	04:01 PM				
	06130	583045834095	Bacon, James			335895	03:29 PM	03:42 PM	00:13	00:13	

Total of Bill Hours: 00:34
Total of Completed Visits: 3
Total of Visits: 6
Grand Total of Billed Hours: 01:52
Grand Total of Completed Visits: 6
Grand Total of Visits: 11

Sandata 10/20/2020 15:53:28 Page 3 of 4

Call Summary - Sample

Client Address Listing

Description:

This report shows all clients and the address, phone number and other information for each client for the selected date.

Use:

Use this report to review a list of all clients and contact information.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number

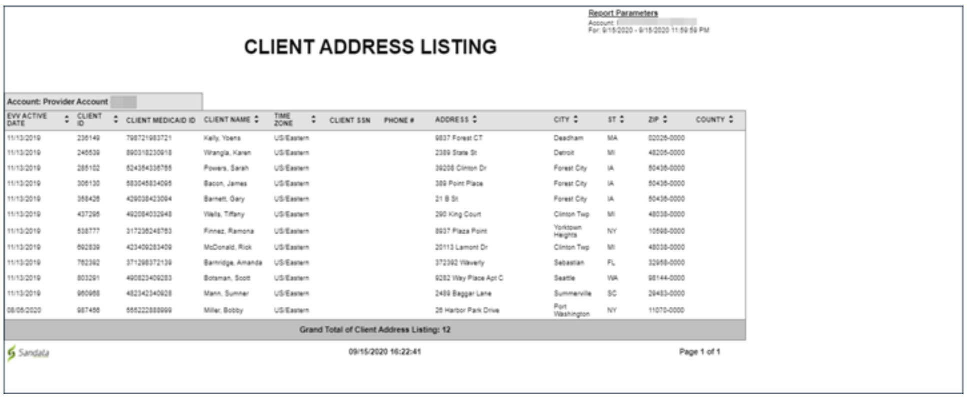
Report Output

Each column of the report displays:

Columns	Description
EVV Active Date	the date the client became active in the system
Client ID	the Sandata client ID
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Name	the client's name
Time Zone	the client's time zone.

Columns	Description
Client SSN	the client's social security number
Phone #	the client's primary phone number
Address	the client's primary street address (line 1)
City	the city from the client's primary address
St	the state from the client's primary address
Zip	the zip code from the client's primary address
County	the county from the client's primary address This value is manually entered or received via an interface and is not validated against the client's address.

Sample Report


Report Parameters
Account:
For: 9/15/2020 - 9/15/2020 11:59:59 PM

CLIENT ADDRESS LISTING

Account: Provider Account

EVV ACTIVE DATE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	TIME ZONE	CLIENT SSN	PHONE #	ADDRESS	CITY	ST	ZIP	COUNTY
11/13/2019	236149	798721983721	Kelly, Yoens	US/Eastern			9837 Forest CT	Deedham	MA	02026-0000	
11/13/2019	246639	890318230918	Wrangla, Karen	US/Eastern			2389 State St	Detroit	MI	48205-0000	
11/13/2019	285102	524364336785	Powers, Sarah	US/Eastern			39208 Clinton Dr	Forest City	IA	50436-0000	
11/13/2019	306130	583045834095	Bacon, James	US/Eastern			389 Point Place	Forest City	IA	50436-0000	
11/13/2019	358426	429038423094	Barnett, Gary	US/Eastern			21 B St	Forest City	IA	50436-0000	
11/13/2019	437295	492084032948	Wells, Tiffany	US/Eastern			290 King Court	Clinton Twp	MI	48038-0000	
11/13/2019	538777	317238248783	Finnez, Ramona	US/Eastern			8937 Plaza Point	Yorktown Heights	NY	10598-0000	
11/13/2019	692839	423409283409	McDonald, Rick	US/Eastern			20113 Lamont Dr	Clinton Twp	MI	48038-0000	
11/13/2019	762392	371298372139	Barnridge, Amanda	US/Eastern			372392 Waverly	Sebastian	FL	32958-0000	
11/13/2019	803291	490823409283	Botsman, Scott	US/Eastern			9282 Way Place Apt C	Seattle	WA	98144-0000	
11/13/2019	960968	482342340928	Mann, Sumner	US/Eastern			2489 Baggar Lane	Summerville	SC	29483-0000	
08/06/2020	987456	555222888999	Miller, Bobby	US/Eastern			26 Harbor Park Drive	Port Washington	NY	11070-0000	

Grand Total of Client Address Listing: 12

Sandata 09/15/2020 16:22:41 Page 1 of 1

Client Address Listing – Sample

Client List with Scheduled Dates

Description:

This report shows a list of all clients with schedules. The report displays authorization information and the dates for the client's first and next schedule.

Use:

Use this report to review the responsiveness to client needs. Authorization information is displayed, including the date the authorization was received and the authorization's start date. This information can identify patterns in how authorizations are issued, for example, extended periods of time from date the authorization was received and the first date of service. The date service was first provided as well as the next scheduled date are displayed to ensure services for active authorizations are ongoing.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number

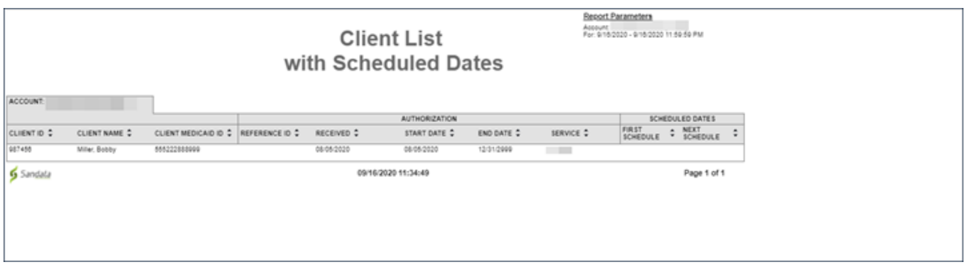
Report Output

Each column of the report displays:

Columns	Description
Client ID	the Sandata client ID
Client Name	the client's name

Columns	Description
Client Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N.”
Reference ID	the authorization’s reference number
Received	the date the authorization was received by the agency provider
Start Date	the start date for the authorization
End Date	the end date for the authorization
Service	the authorization’s service
First Schedule	the date of the first scheduled visit after the authorization’s start date
Next Schedule	the date of the next scheduled visit for that service

Sample Report



Client List with Scheduled Dates -Sample

Employee Attributes

Description:

This report shows information about employees as of a selected date. The report displays basic demographic information as well as important dates (last visit, next visit and upcoming schedules).

Use:

This report can be used by provider agencies to better understand their employee roster. Address and phone information are included to make contacting the employee easier. The employee's last and next visit are displayed to show recent and upcoming activity. The number of upcoming schedules for each employee is also included. Typically, the system includes up to 2 weeks of schedules.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number
Provider ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)

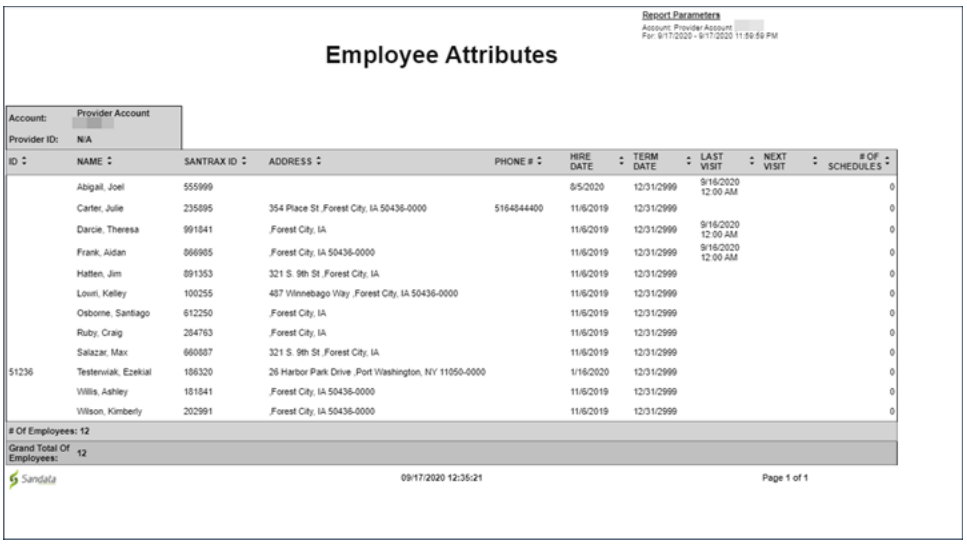
Report Output

Each column of the report displays:

Columns	Description
ID	the employee's ID number
Name	the employee's name
Santrax ID	the employee's Santrax ID
Address	the employee's primary address
Phone	the employee's primary phone number
Hire Date	the employee's hire date or the first date the employee was added to Sandata EVV

Columns	Description
Term Date	the employee's termination date or the date the employee was marked as inactive (deleted) in Sandata EVV
Last Visit	the date and time of the last visit started by the employee
Next Visit	the date and time of the employee's next scheduled visit
# of Schedules	the number of schedules for the employee in Sandata EVV
# of Employees	the number of employees for the account
Grand Total of Employees	the grand total of employees for the account

Sample Report



Report Parameters
Account: Provider Account
For: 9/17/2020 - 9/17/2020 11:59:59 PM

Employee Attributes

Account: Provider Account
Provider ID: N/A

ID	NAME	SANTRAX ID	ADDRESS	PHONE #	HIRE DATE	TERM DATE	LAST VISIT	NEXT VISIT	# OF SCHEDULES
	Abigail, Joel	555999			8/5/2020	12/31/2999	9/16/2020 12:00 AM		0
	Carter, Julie	235895	354 Place St ,Forest City, IA 50436-0000	5164844400	11/6/2019	12/31/2999			0
	Darcie, Theresa	991841	,Forest City, IA		11/6/2019	12/31/2999	9/16/2020 12:00 AM		0
	Frank, Aidan	866985	,Forest City, IA 50436-0000		11/6/2019	12/31/2999	9/16/2020 12:00 AM		0
	Hatten, Jim	891353	321 S. 9th St ,Forest City, IA		11/6/2019	12/31/2999			0
	Lowri, Kelley	100255	487 Winnebago Way ,Forest City, IA 50436-0000		11/6/2019	12/31/2999			0
	Osborne, Santiago	612250	,Forest City, IA		11/6/2019	12/31/2999			0
	Ruby, Craig	284763	,Forest City, IA		11/6/2019	12/31/2999			0
	Salazar, Max	660887	321 S. 9th St ,Forest City, IA		11/6/2019	12/31/2999			0
51236	Testerwiak, Ezekial	186320	26 Harbor Park Drive ,Port Washington, NY 11050-0000		1/16/2020	12/31/2999			0
	Willis, Ashley	181841	,Forest City, IA 50436-0000		11/6/2019	12/31/2999			0
	Wilson, Kimberly	202991	,Forest City, IA 50436-0000		11/6/2019	12/31/2999			0

Of Employees: 12
Grand Total Of Employees: 12

Sandata 09/17/2020 12:35:21 Page 1 of 1

Employee Attributes - Sample

GPS Distance Exception Report

Description:

This report displays calls entered by a mobile user from a GPS location that is further from any of the client's GPS validated addresses than the configured distance threshold.

Use:

Use this report to identify calls that were not made from an expected location. The report also indicates the distance the call was made from the client's closest address.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number
Payer	the payer
Program	the program

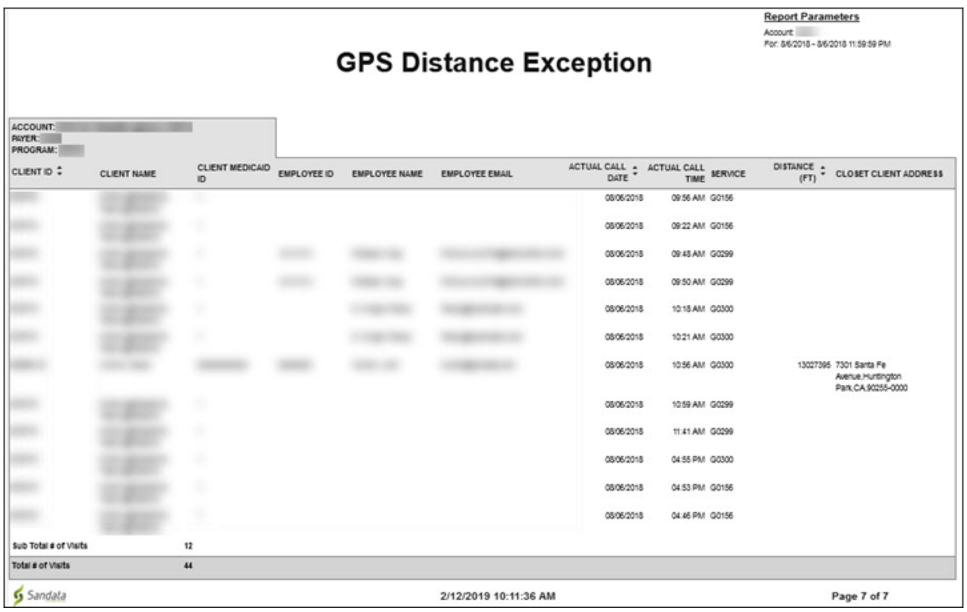
Report Output

Each column of the report displays:

Columns	Description
Client ID	the Sandata client ID

Columns	Description
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Employee ID	the employee's ID
Employee Email	the employee's email address
Actual Call Date	the date the call was received
Actual Call Time	the time the call was received
Service	the service performed for the visit
Distance (Ft)	the distance in feet from the client's closest address
Closest Client Address	the client's address closest to the call's GPS coordinates

Report Sample


Report Parameters
Account:
For: 8/6/2018 - 8/6/2018 11:59:59 PM

GPS Distance Exception

ACCOUNT:
PAYER:
PROGRAM:

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	SERVICE	DISTANCE (FT)	CLOSET CLIENT ADDRESS
						08/06/2018	09:56 AM	G0156		
						08/06/2018	09:22 AM	G0156		
						08/06/2018	09:48 AM	G0299		
						08/06/2018	09:50 AM	G0299		
						08/06/2018	10:18 AM	G0300		
						08/06/2018	10:21 AM	G0300		
						08/06/2018	10:56 AM	G0300	13027395	7301 Santa Fe Avenue,Huntington Park,CA,90255-0000
						08/06/2018	10:59 AM	G0299		
						08/06/2018	11:41 AM	G0299		
						08/06/2018	04:55 PM	G0300		
						08/06/2018	04:53 PM	G0156		
						08/06/2018	04:46 PM	G0156		

Sub Total # of Visits 12
Total # of Visits 44

Sandata 2/12/2019 10:11:36 AM Page 7 of 7

GPS Distance Exception Report

Individual Plan of Care

Description:

This report shows plans of care set up for individual clients, which each client receiving a page. The report shows plan of care information including start/end dates, tasks and frequency.

Use:

Use this report to review individual plans of care for clients. This report can be used to easily review planned activities for a client based on the plan of care entered into or received by the system. Agency personal, including clinicians, can use this report to validate that the plan of care is appropriate for the client and is used by Sandata's mobile application, SMC when presenting the task list to the employee during the visit.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) When a partial name is entered the report will display results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Client ID	the Sandata client ID

Report Output

Each column of the report displays:

Tasks and Frequency

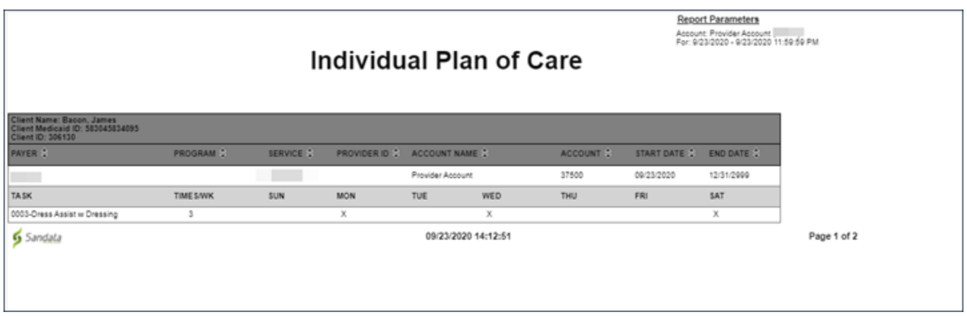
Columns	Definition
Payer	the payer for the plan of care
Program	the program(s) for the plan of care
Service	the service(s) for the plan of care
Provider ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)
Account Name	the account name
Account	the provider agency's Sandata EVV account number
Start Date	the start date of the client's plan of care
End Date	the end date of the client's plan of care When no end date is selected, the end date displays as 2099 or 2999.

<u>Tasks and Frequency</u>

Each column of the report displays:

Columns	Definition
Task	the tasks assigned to the plan of care
Times/Wk	the number of times per week each task is performed
Sun/Mon/Tues/Wed etc	the days of the week when the task is to be performed Days that are a part of the plan of care are indicated with an "X."

Sample Report


Report Parameters
Account: Provider Account
For: 9/23/2020 - 9/23/2020 11:59:59 PM

Individual Plan of Care

Client Name: Bacon, James
Client Medicaid ID: 583045834095
Client ID: 306130

PAYER	PROGRAM	SERVICE	PROVIDER ID	ACCOUNT NAME	ACCOUNT	START DATE	END DATE
				Provider Account	37500	09/23/2020	12/31/2999

TASK	TIMES/WK	SUN	MON	TUE	WED	THU	FRI	SAT
0003-Dress Assist w Dressing	3		X		X			X

Sandata 09/23/2020 14:12:51 Page 1 of 2

Individual Plan of Care - Sample

Payer-Program-Service Listing

Description:

This report shows the payer, program, and service hierarchy for the account.

Use:

Use this report to review the payer, program and service hierarchy as well as the start and end dates for services. The report also displays any modifiers applied to services and whether nor not the service is required by the Cures Act. The report can assist providers in reviewing the payer configuration for the program. It can also help payers review the current communication before communicating with providers.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)

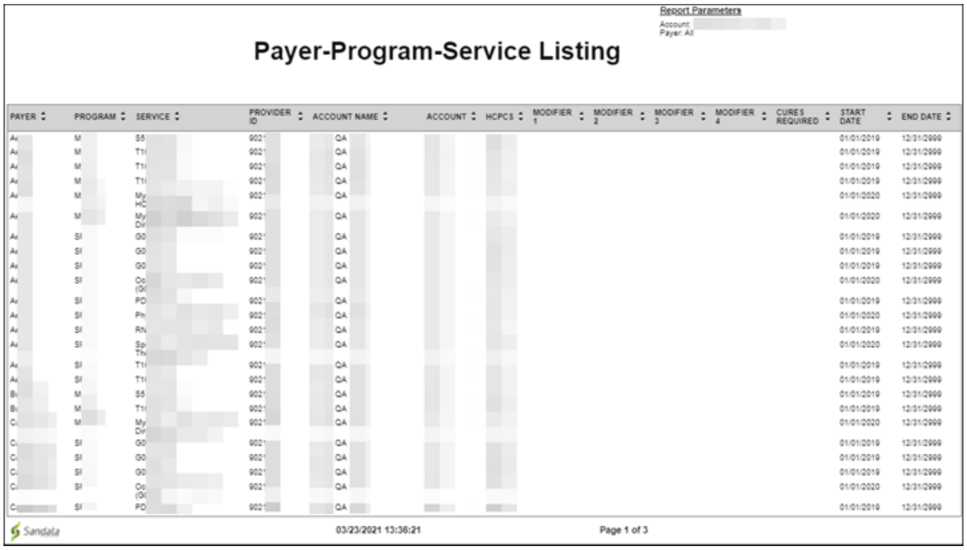
Report Output

Each column of the report displays:

Columns	Description
Payer	the payer
Program	the program
Service	the service
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Account Name	the account name
Account	the provider agency's Sandata EVV account number
HCPCS	the HCPCS code used for billing
Modifier 1	The first modifier applied to the service
Modifier 2	the second modifier applied to the service
Modifier 3	the third modifier applied to the service
Modifier 4	the fourth modifier applied to the service
Cures Required	an indicator that displays whether or not the service is required by the Cures Act This indicator only displays if the service has been configured for it. All services for a payer program should be assumed to be Cures Act required unless otherwise indicated

Columns	Description
Start Date	the start date for the service
End Date	the end date for the service, an end date of 12/31/2999 is used to indicate an ongoing service

Sample Report



Payer-Program-Service Listing - Sample

Provider Listing

Description:

This report displays a list of all provider accounts assigned to the selected access group. It includes general information about each account.

Use:

Use this report to review a list of all provider accounts.

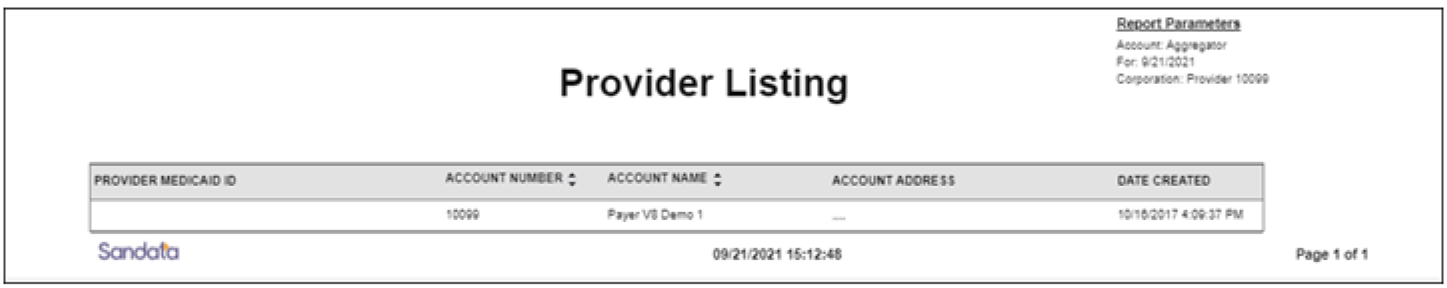
Fields and Columns:

Report Output

Each column of the report displays:

Columns	Description
Provider Medicaid ID	the state assigned identifier for the provider
Account Number	the provider's Sandata EVV account number
Account Name	the account name
Account Address	the account's address
Date Created	the date the provider account was created by Sandata

Sample Report



Report Parameters
Account: Aggregator
For: 9/21/2021
Corporation: Provider 10099

Provider Listing

PROVIDER MEDICAID ID	ACCOUNT NUMBER	ACCOUNT NAME	ACCOUNT ADDRESS	DATE CREATED
	10099	Payer V8 Demo 1	...	10/16/2017 4:09:37 PM

Sandata 09/21/2021 15:12:48 Page 1 of 1

Provider Listing - Sample

Speaker Verification Enrollment

Description:

This report displays a list of employees and the date they enrolled in speaker verification.

Use:

Use this report to review employees and identify which employees have been enrolled in speaker verification and which employees still need to be enrolled. This can be used as an operational report for provider agencies actively enrolling users in the speaker verification platform.

Fields and Columns:

Parameters

This report has no parameters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency
Provider ID	The state assigned identifier for the provider (e.g Provider Medicaid ID)
Enrolled:	N/A

Report Output

Each column of the report displays:

Columns	Description
Employee ID	the employee ID
Employee Name	the employee's name
Santrax ID	the employee’s Santrax ID
Phone Number	the employee’s phone number
EVV Active Date	the date the employee first made known to the EVV system (e.g first entry, first receipt, etc)
Enrollment Date	the date the employee enrolled in speaker verification

Sample Report

Report Parameters
Account: Provider Account ( )
For: 3/23/2021 - 3/23/2021 11:59:59 PM

Speaker Verification Enrollment

ACCOUNT: Provider Account ( )
PROVIDER ID: None
ENROLLED: No

EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	PHONE NUMBER	EVV ACTIVE DATE	ENROLLMENT DATE
	Abigail, Joel	555999		08/05/2020	
	Darcie, Theresa	991841		11/06/2019	
	Demo, Sandata	515459		02/12/2021	
	Demo1, Sandata	123654		02/12/2021	
	Hatten, Jim	891353		11/06/2019	
	Lowri, Kelley	100255		11/06/2019	
	Osborne, Santiago	612250		11/06/2019	
	Ruby, Craig	284763		11/06/2019	
	Salazar, Max	660887		11/06/2019	
51236	Testerwiak, Ezekial	186320		01/16/2020	
	Carter, Julie	235895		11/06/2019	01/23/2020
	Frank, Aidan	866985		11/06/2019	01/23/2020

Sandata 03/23/2021 15:54:49 Page 1 of 1

Speaker Verification Enrollment - Sample

Speaker Verification Enrollment (Employee)

Description:

This report displays a list of all employees enrolled in speaker verification.

Use:

This report can be used to see which employees have not yet enrolled in speaker verification by comparing it to the full list of employees.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

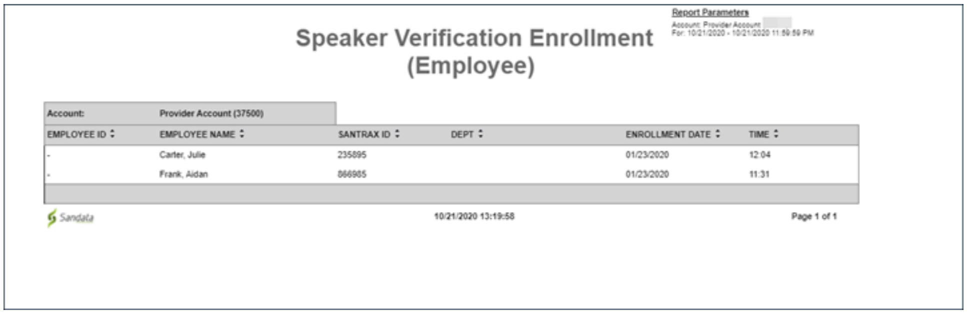
Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report displays:

Columns	Description
Employee ID	the employee's ID
Employee Name	the employee's name
Santrax ID	the employee's Santrax ID
Dept	the employee's department Depending on agency specific configurations, this field may display a different value.
Enrollment Date	the date the employee enrolled in speaker verification
Time	the time the employee enrolled in speaker verification

Sample Report



Report Parameters
Account: Provider Account
For: 10/21/2020 - 10/21/2020 11:59:59 PM

Speaker Verification Enrollment (Employee)

Account:	Provider Account (37500)				
EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	DEPT	ENROLLMENT DATE	TIME
-	Carter, Julie	235895		01/23/2020	12:04
-	Frank, Aidan	866985		01/23/2020	11:31

Sandata 10/21/2020 13:19:58 Page 1 of 1

Speaker Verification Enrollment (Employee) - Sample

Visit Listing

Description:

This report displays all actual calls for all visits across all agencies for the selected day. It allows the user to see all activity for a specific day across agencies, allowing users to perform further analytics on activity.

Use:

Use this report to view all visits for the selected day and review the visit status and call in/out times in one report.

Fields and Columns:

Parameter

This report does not offer any parameters. All visits are included.

Report Output

Each column of the report displays:

Columns	Description
Payer	the payer
Account	the provider's Sandata EVV account number
Account Name	the account name
Provider Medicaid ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Employee Name	the employee's name
Employee Santrax ID	the employee's Santrax ID
Employee SSN	the employee's social security number
Call: Start	the call in time for the visit
Call: End	the call out time for the visit
Group Visit Code	the group visit code associated with the visit
Status	the status of the visit

Sample Report

Report Parameters
Account:
For: 1/14/2020 - 1/14/2020 11:59:59 PM

Visit Listing

									CALL			
PAYER	ACCOUNT	ACCOUNT NAME	PROVIDER MEDICAID ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	EMPLOYEE SSN	START	END	GROUP VISIT CODE	STATUS
		Provider Account		Bacon, James	583045834095			***-*-	11:29 AM	11:43 AM		Incomplete
		Provider Account		Bacon, James	583045834095			***-*-	03:29 PM	03:42 PM		Incomplete
		Provider Account		Mann, Sumner	482342340928			***-*-	03:44 PM			Incomplete
		Provider Account		Barnridge, Amanda	371298372139			***-*-	03:52 PM	03:59 PM		Incomplete
		Provider Account	567981345	Barnridge, Amanda	371298372139	Lowri, Kelley	100255	***-*8-1345	04:00 PM	04:20 PM		Approved
		Provider Account		Mann, Sumner	482342340928			***-*-	04:01 PM			Incomplete
		Provider Account	209546123	Mann, Sumner	482342340928	Osborne, Santiago	612250	***-*4-6123	04:11 PM	05:01 PM		Approved
		Provider Account	476772149	Bacon, James	583045834095	Carter, Julie	235895	***-*7-2149	04:15 PM	04:23 PM		Approved
		Provider Account		Mann, Sumner	482342340928			***-*-		03:53 PM		Incomplete
		Provider Account		Barnridge, Amanda	371298372139			***-*-		04:05 PM		Incomplete
		Provider Account	567981345	Barnridge, Amanda	371298372139	Lowri, Kelley	100255	***-*8-1345		04:15 PM		Verified

Grand Total of Visits: 11

Sandata 10/21/2020 13:43:44 Page 1 of 1

Visit Listing - Sample

Visit Verification

Description:

This report provides information for visits on a given date. Reported information for each visit includes all call information.

Use:

Use this report to see all information about a visit including additional information that is not visible directly on the visit line in Visit Maintenance, such as extraneous calls. This report can be used as a convenient way to report and/or verify visit maintenance information.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

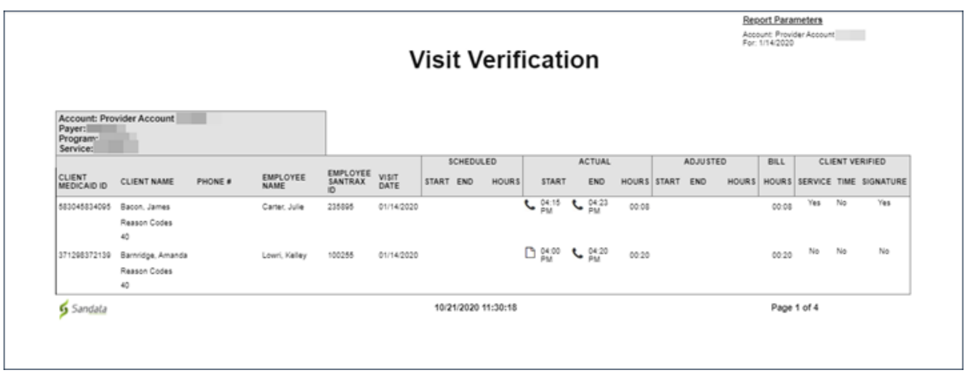
Field	Description
Account	the provider agency's Sandata EVV account number
Payer	the payer
Program	the program
Service	the service performed for the visit

Report Output

Each column of the report lists:

Columns	Description
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Name	the client's name
Phone #	the client's primary phone number
Employee Name	the employee's name
Employee Santrax ID	the employee's Santrax ID
Visit Date	the date of the visit
Scheduled: Start	the scheduled start time for the visit
Scheduled: End	the scheduled end time for the visit
Scheduled: Hours	the total hours scheduled for the visit
Actual: Start	the actual start time for the visit
Actual: End	the actual end time for the visit
Actual: Hours	the actual hours elapsed for the visit
Adjusted: Start	the manually entered start time for the visit
Adjusted: End	the manually entered end time for the visit
Adjusted: Hours	the manually entered hours elapsed for the visit
Bill Hours	the total billable hours for the related visit
Client Verified Service	indicates if the client verified the service
Client Verified Time	indicates if the client verified the time
Client verified Signature	indicates if the client verified the signature

Sample Report



Report Parameters
Account: Provider Account
For: 1/14/2020

Visit Verification

Account: Provider Account
Payer:
Program:
Service:

						SCHEDULED			ACTUAL			ADJUSTED			BILL	CLIENT VERIFIED		
CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	VISIT DATE	START	END	HOURS	START	END	HOURS	START	END	HOURS	HOURS	SERVICE	TIME	SIGNATURE
583045834095	Bacon, James Reason Codes 40		Carter, Julie	235895	01/14/2020				04:15 PM	04:23 PM	00:08				00:08	Yes	No	Yes
371298372139	Barnridge, Amanda Reason Codes 40		Lowri, Kelley	100255	01/14/2020				04:00 PM	04:20 PM	00:20				00:20	No	No	No

Sandata 10/21/2020 11:30:18 Page 1 of 4

Visit Verification - Sample

Visit Verification Activity Details

Description:

This report shows all visits taking place for a specific day. The report displays visit information including client name, employee name, call in and call out time as well as additional visit information including scheduled visit times, and billing information.

Use:

Note: This report is from a previous version of the application and does not include all information for a payer program.

Use this report to review activity performed for visits that occurred for a selected. This shows all of the changes that were made for the visit along with the reason codes applied. The second line of the visit shows what the change was, who made the change and when. This report can be used to understand visits are being modified and which user is making those modifications.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client’s Medicaid ID.

Report Output

Each column of the report lists:

Columns	Description
SPV	the supervisor at the provider agency
Client	the client's ID and name (last, first)
Employee	the employee's username
View	N/A
Date	the date of the visit
Scheduled Start	the scheduled start time for the visit
Scheduled End	the scheduled end time for the visit

Sample Report

Columns	Description
Scheduled Hours	the total hours scheduled for the visit
Actual Start	the actual start time for the visit
Actual End	the actual end time for the visit
Actual Hours	the total hours based on actual calls
Pay Hours	the total payable hours
Reason Codes	any reason codes applied when editing the visit
Task	the tasks performed for the visit
EXP	indicates whether or not the visit has been exported

Sample Report

Visit Verification Activity Details - Sample

Approved Visits Report

Description:

This report shows all visits flagged as approved for the selected date range. The report is grouped with one employee and client per page, showing all visits for that employee and client. This report displays details about the visit including approval date, services, tasks and call in and out times. This report requires the account to be using the ‘approval’ feature. The maximum date range of this report is 730 days.

Use:

Use this report to view a summary of approved visits, by employee and client. The report can assist in comparing the approval date versus the visit date to ensure that visits are being approved in a timely manner. In Sandata EVV, making adjustments after the visit has occurred removes any auto or client approval and the visit must be re-approved.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client’s Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Employee Name	the employee's name
Client Name	the client's name
Santrax ID	the employee's Santrax ID
Client ID	the Santrax client ID

Report Output

Each column of the report displays:

Columns	Description
Approved Date	the date the visit was flagged as approved
Service	the service selected for the visit
Task	the task(s) selected for the visit
Adj Service	the manually entered service for the visit This only displays if the service was manually changed in the system.
EVV In	the call in time for the visit based on any of the visit capture methods (Mobile, Telephony, FVV, Manual, Other)
EVV Out	the call out time for the visit based on any of the visit capture methods (Mobile, Telephony, FVV, Manual, Other)
EVV HOURS	the length of the visit in hours, based on the EVV In and EVV Out times.
ADJ EVV IN	the manually entered call in time for the visit
ADJ EVV OUT	the manually entered call out time for the visit
ADJ HOURS	the calculated visit length based on any adjustments made
TOTAL HOURS	the total number of approved hours
TOTAL ADJ HOURS	the total number of adjusted approved hours

Sample Report

Approved Visits Report – Sample

Auto Verification Details

Description:

This report displays all visits for the selected date range and shows how they were confirmed (manually or automatically) as well as details about any manual edits made to the visit.

Use:

This shows visit verification activity details to enhance program compliance. To minimize manual editing, auto-verified visits are preferred. This improves visit capture and reduces provider agency workload.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)

Report Output

Each column of the report displays:

Columns	Description
Visit Date	the date of the visit
Visit Key	the visit ID related to the visit
Medicaid ID	the client's Medicaid ID. Blank if non-applicable or unknown.
Client Name	the client’s name
Provider ID	the state assigned identifier for the provider (Example: Provider Medicaid ID)
Verified Type	how the visit was verified (Key: A = Automatic, M = Manual)
Call Time/Call Type	------------
Start	the call in time for the visit
End	the call out time for the visit
Manual Call	a 'Y' if the call out was manually created
Adjusted Times	------------
Start	the manually entered start time for the visit
End	the manually entered end time for the visit

Columns	Description
Updated	a 'Y' if an adjusted call in or call out was added
Edits	------------
Visit Update	a 'Y' if the visit was manually updated
Acknowledgment Exception Codes	the related codes if an exception was acknowledged. See the legend at the end of the report for a full list of codes.
Reason Codes	any reason codes applied when editing the related visit . See the legend at the end of the report for a full list of codes.

Sample Report

Report Parameters
Account: DEV Agency ( )
For: 4/1/2022 - 4/30/2022 11:59:59 PM

Auto Verification Details

						CALL TIME/CALL TYPE				ADJUSTED TIMES			EDITS		
VISIT DATE	VISIT KEY	MEDICAID ID	CLIENT NAME	PROVIDER ID	VERIFIED TYPE	START	MANUAL CALL	END	MANUAL CALL	START	END	UPDATED	VISIT UPDATE	ACKNOWLEDGMENT EXCEPTION CODES	REASON CODES
4/14/2022	2148446378	3254	ADD	001	A	05:55 AM		06:55 AM						A25	10
4/14/2022	2148446373	2355	KMS	001	A	05:47 AM		06:47 AM						A25	10
4/12/2022	2148446017	4565	TES	001	M	10:47 PM		10:57 PM		09:57 PM	11:07 PM	Y		B9	11
4/12/2022	2148446016	2112	ABC	001	M	10:34 PM		10:44 PM		09:44 PM	10:54 PM	Y		A25	1001

Auto Verification Details – Sample

Report Parameters
Account: ( )
For: 6/1/2023 - 6/30/2023 11:59:59 PM
Corporation:

Auto Verification Details

DEFINITION	
VISIT DATE	Date Visit Occurred
VISIT KEY	Unique Identifier in Sandata
MEDICAID ID	Medicaid Identifier for client
CLIENT NAME	Client's full name
PROVIDER ID	State assigned identifier for provider
VERIFIED TYPE	A= Auto, M= Manual
CALL TIME/CALL TYPE	
START	Start of the call/visit
MANUAL CALL	Y = Visit was manually created
END	End of the call/visit
MANUAL CALL	Y = Visit was manually created
ADJUSTED TIMES	
START	Start of the adjusted time/date
END	End of the adjusted time/date
UPDATED	Y = an update to the visit occurred
EDITS	
VISIT UPDATE	Y = there is a re-transmittal of a visit (regardless of whether the information changed or not).
ACKNOWLEDGEMENT EXCEPTION CODES	See Legend for definitions
REASON CODES	See Legend for definitions

REASON CODE	DESCRIPTION	NOTE REQUIRED?
100	Member No Show	Yes
110	Member Unavailable	Yes
120	Member Refused Verification	Yes
130	Member Refused Service	Yes
140	Member Incapable, Designee Unavailable	No
150	Caregiver Failed to Call In - Verified Services Were Delivered	No
160	Caregiver Failed to Call Out - Verified Services Were Delivered	No
170	Caregiver Failed to Call In and Out - Verified Services Were Delivered	No
180	Caregiver Called Using an Alternate Phone	Yes
190	Caregiver Change	No
200	Mobile App Issue/Inoperable	No
210	Telephony Issue/Inoperable	No
220	FVV Issue/Inoperable	No
230	Service Outside the Home	Yes
240	Unsafe Environment	No
250	Does Not Contain Task Information	Yes
999	Other	Yes

EXC. NO	ACKNOWLEDGEMENT EXCEPTION	EXC. NO	ACKNOWLEDGEMENT EXCEPTION 1
A0	Unknown Clients	B0	Unmatched Billing and Scheduled Hours
A1	Unknown Employees	B1	Billing Hours less than Scheduled Hours
A2	Visits Without Any Calls	B2	Unmatched Billing and Payroll Hours
A3	Visits Without In-Calls	B3	Unauthorized Service
A4	Visits Without Out-Calls	B4	Extraneous Calls
A5	Unscheduled Visits	B5	Client Eligibility
A6	Unmatched Payroll and Scheduled Hours	B6	Pay Hours greater than Maximum Allowed Hours
A7	Payroll Hours less than Scheduled Hours	B7	OT/ABS Exception
A8	Actual Hours more than Scheduled Hours	B8	Client Signature Exception
A9	Rejected Visits	B9	Service Verification Exception
A10	Missing Tasks	B10	Location Required
A11	Missing Critical Tasks	B11	Missing Location
A12	Invalid Contract / Payer	B12	Invalid Task
A13	Employee Replacement	B13	Visit Memo Requirement Not Met
A14	Missing Contract / Payer	B14	Missing Medicaid ID
A15	Unmatched Client ID / Phone		
A16	Missing Procedure Code		
A17	Task Mileage Exception		
A18	Late In-Call		
A19	Early Out-Call		
A20	Short Visit		
A21	No Show Exception		
A22	Time Entered in Tasks exceeds Payroll Hours		
A23	Missing Service		
A24	Time Entered in Tasks less then Scheduled Hours		
A25	GPS Distance Exception		
A26	Employee Speaker Verification Exception		
A27	Client Speaker Verification Exception		
A28	Visit Verification Exception		
A29	Missing Reason Codes		
A30	Client Speaker Verification Bypassed		

Auto Verification Details – Legends

Auto Verification Summary

Description:

This report displays verification statistics for each provider agency for the selected date range.

Use:

This report allows users to compare the number of automatically verified visits versus manually confirmed visits across agencies. The results include all visits. This report displays cross agency visit verification trends, which provides an overview of the overall program compliance. To minimize manual editing, auto-verified visits are preferred. This improves visit capture and reduces provider agency workload.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)

Report Output

Each column of the report displays:

Columns	Description
Account	the provider's EVV account number
Account Name	the account name
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Verified Visits	------
Auto	the number of visits that did not have any manual updates applied
%	the percentage of visits that did not have any manual updates applied
Manual	the number of visits that have manual updates applied
%	the percentage of visits that have manual updates applied
Non Verified Visits	------
In-Complete	the number of unverified visits missing necessary information

Columns	Description
%	the percentage of unverified visits missing necessary information
Omit	the number of unverified visits flagged for omission
%	the percentage of unverified visits flagged for omission
With Manual Updates	------
Manual Calls	the number of manually created calls
%	the percentage of manually created calls
Manual Edits	the number of visits with manual edits
%	the percentage of visits with manual edits
Adj, Visits	the number of visits with adjusted times
%	the percentage of visits with adjusted times
All Visits	------
Verified Visits	the number of verified visits
%	the percentage of verified visits
Non Verified Visits	the number of visits that have not been completed and are scheduled or are still pending manual updates
%	the percentage of visits that have not been completed and are scheduled or are still pending manual updates

Sample Report

Report Parameters
Account: DEV (Agency ( )
For: 7/1/2023 - 7/31/2023 11:59:59 PM

Auto Verification Summary

			VERIFIED VISITS				NON VERIFIED VISITS				WITH MANUAL UPDATES						ALL VISITS			
ACCOUNT	ACCOUNT NAME	PROVIDER ID	AUTO	%	MANUAL	%	IN-COMPLETE	%	OMIT	%	MANUAL CALLS	%	MANUAL EDITS	%	ADJ. VISITS	%	VERIFIED VISITS	%	NON VERIFIED VISITS	%
100	DEV Agency	001	0	0.0	1	100.0	18	94.7	0	0.0	1	100	1	100	0	0	1	5.3	18	94.7
	Grand Totals:		0		1		18		0		1		1		0		1		18	

**The values in "WITH MANUAL UPDATES" section can overlap. This means that a visit can belong to more than one group.
The percentage is based on all visits that were manually verified.

Sandata 10/10/2023 12:39:20 Page 1 of 1

Auto Verification Summary – Sample

Client Visit Summary Report

Description:

This report shows all visits for the selected date range sorted by client, with one client per page, for the selected date range. The report provides visit hour sub-totals by date and client as well as basic visit information which includes: visit date, employee's Santrax ID, employee's name, number of visits, visit start and end time, and visit hours.

Use:

Use this report to review visit hours and information by client.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	Clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the selected supervisor
Department	the selected department
Task	the selected task(s)
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Output

Each column of the report displays:

Columns	Description
Santrax ID	the employee’s Santrax ID.
Email	the employee’s email address.
Employee	the employee who conducted the visit.
Date	the date of the visit.
Start	the start time of the visit.

Columns	Description
End	the end time of the visit.
# Of Visits	the number of visits conducted.
Hours	the length of the visit in hours

Sample Report

Report Parameters
Account:
For: 8/10/2017 - 8/11/2017 11:59:59 PM

Client Visit Summary Report

ACCOUNT:
PAYER:
PROGRAM: None
SERVICE: None
SPV: None
CLIENT ID:
MEDICAID ID: 998877665544
CLIENT NAME:

SANTRAX ID	EMAIL	EMPLOYEE	DATE	START	END	# OF VISITS	HOURS	
000506287			08/10/17	02:09 PM	02:14 PM		0.08	
000608943			08/10/17	03:28 PM	03:30 PM		0.03	
000506287			08/10/17	03:53 PM	03:56 PM		0.05	
				Client/Date Sub-Total:		3	0.17	
000608943			08/11/17	10:41 AM	11:00 AM		0.32	
				Client Totals:		4	0.48	11:00

Sandata 8/11/2017 11:16:37 AM Page 2 of 15

Client Visit Summary Report-Sample

Consolidated Activity

Description:

This report displays visit information and detailed task data, including any collected readings for the account, over a selected date range. The report consolidates activity by client showing the employee and tasks for each visit. The maximum date range for this report is 31 days.

Use:

Use this report to review visit and task activity over a selected date range for a given client. This can assist users in reviewing visit and task history.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Employee	Employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

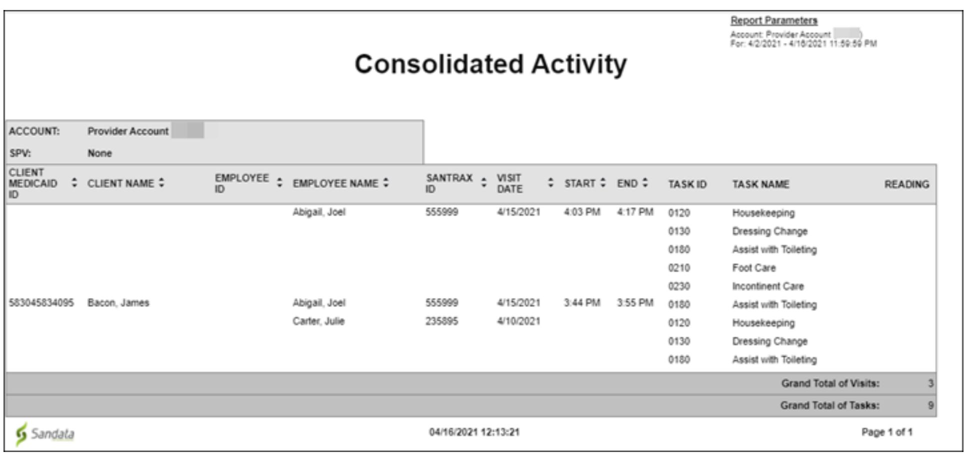
Field	Description
Account	the provider agency
SPV	the supervisor at the provider agency

Report Output

Each column of the report displays:

Columns	Description
Client Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Client Name	the client’s name. Blank if unknown.
Employee ID	the employee ID
Employee Name	the employee’s name Blank if unknown.
Santrax ID	the employee's Santrax ID
Visit Date	the date of the visit
Start	the start time of the visit (actual or adjusted, if an adjustment exists)
End	the end time of the visit (actual or adjusted, if an adjustment exists)
Task ID	the task ID
Task Name	the task(s) performed for the visit
Reading	the reading associated with the task
Grand Total of Visits	the grand total of visits for the selected date range
Grand Total of Tasks	the grand total of tasks performed for the selected date range

Sample Report



Report Parameters
Account: Provider Account
For: 4/2/2021 - 4/16/2021 11:59:59 PM

Consolidated Activity

ACCOUNT: Provider Account
SPV: None

CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	VISIT DATE	START	END	TASK ID	TASK NAME	READING
			Abigail, Joel	555999	4/15/2021	4:03 PM	4:17 PM	0120	Housekeeping	
								0130	Dressing Change	
								0180	Assist with Toileting	
								0210	Foot Care	
								0230	Incontinent Care	
583045834095	Bacon, James		Abigail, Joel	555999	4/15/2021	3:44 PM	3:55 PM	0180	Assist with Toileting	
			Carter, Julie	235895	4/10/2021			0120	Housekeeping	
								0130	Dressing Change	
								0180	Assist with Toileting	
									Grand Total of Visits:	3
									Grand Total of Tasks:	9

Sandata 04/16/2021 12:13:21 Page 1 of 1

Consolidated Activity - Sample

Daily and Weekly Hours Worked - Detail

Description:

This report displays a detailed view of the hours worked by each employee for each agency, daily and weekly.

Use:

This report allows users to view the total hours being worked per employee and should be used with the Summary version for analysis. This information can be compared across agencies to locate discrepancies and trends. Users can also review this report to identify workers who may be working more than a given number of hours per day or week.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Employee	the selected employee

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)

Report Output

Each column of the report displays:

Columns	Description
Employee Name	the employee's name
Employee ID	the assigned employee ID
Santrax ID	the employee's Santrax ID
Sun/Mon/Tus/Wed/Thus/Fri/Sat	the total number of hours worked by employees for each day of the week
Total	the total number of hours worked by the employee (for the week) Individual values are displayed as minutes.

Columns	Description
Average	the average number of daily hours worked by the employee (for the week)

Sample Report

Report Parameters
Account: [redacted] (37500)
For: 1/11/2020 - 1/17/2020 11:59:59 PM

Daily / Weekly Hours Worked - Detail

ACCOUNT: [redacted] (37500)
PROVIDER ID: None

EMPLOYEE NAME	EMPLOYEE ID	SANTRAX ID	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL	AVERAGE
Carter, Julie		235895			00:08					00:08	00:01
Osborne, Santiago		612250			00:50					00:50	00:07
Lowri, Kelley		100255			00:20					00:20	00:03
									Page Totals:	01:18	00:04
									Grand Totals:	01:18	00:04

Sandata 01/17/2020 11:13:41 Page 1 of 1

Daily / Weekly Hours Worked – Detail – Sample

Daily / Weekly Hours Worked - Summary

Description:

This report displays the number of hours worked per employee, by agency, for the selected week.

Use:

This report is intended to help users to understand the total amount of hours being worked per agency and review the total number of employees and the average hours worked, per employee. This information can be compared across agency in order to identify discrepancies and trends.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Employee	the selected employee

Report Output

Each column of the report displays:

Columns	Description
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Account Name	the account name
Account	the provider agency's Sandata EVV account number
# Of Employees	the number of employees
Sun/Mon/Tue/Wed/Thur/Fri/Sat Total	the total number of hours worked by all employees for each day of the week.
Sun/Mon/Tus/Wed/Thur/Fri/Sat Average	the average number of hours worked by all employees for each day of the week.
Total	the total number of hours worked by all employees for the week
Average	the average number of daily hours worked by all employees for the week
Grand Totals:	the grand totals for the total and average numbers of hours worked by all employees, across all agencies in the program, for the week

Sample Report

Report Parameters
Account: (37500)
For: 1/11/2020 - 1/17/2020 11:59:59 PM

Daily / Weekly Hours Worked - Summary

PROVIDER ID	ACCOUNT NAME	ACCOUNT	# OF EMPLOYEES	SUN-TOTAL	SUN-AVG	MON-TOTAL	MON-AVG	TUE-TOTAL	TUE-AVG	WED-TOTAL	WED-AVG	THU-TOTAL	THU-AVG	FRI-TOTAL	FRI-AVG	SAT-TOTAL	SAT-AVG	TOTAL	AVERAGE
		37500	3					01:18	00:26									01:18	00:04
																	Grand Totals:	01:18	00:04

Sandata 01/17/2020 11:20:48 Page 1 of 1

Daily and Weekly Hours Worked – Summary – Sample

Detail Visit Status

Description:

This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee information pertaining to the visit with the visit details such as, exceptions, services, date, time and the actual/adjusted call-in and call-out times.

Use:

Use this report to review a detailed overview of all visits within a selected date range.

Field and Columns:

Parameters Use the following fields to limit the report output to:

Field	Description
Payer	visits for the selected payer
Program	the selected program(s)
Supervisor	visits for the selected supervisor
Visit Status	visits for the selected visit status

Report Output

Each column of the report displays:

Field	Description
Visit ID	the **Visit ID** related to the visit
Medicaid ID	the client's Medicaid ID
Client	the client associated with the visit
Employee	the name of the employee who conducted the visit
Service	the service(s) performed during the visit
Date	the date of the visit
Scheduled, Start, End	the scheduled start time and end time for the visit
Call, In, Out	the call-in and call out time of the visit
Adjusted, In, Out	the manual call in and call out times for the visit
Exceptions	any exceptions that occurred during the visit

Sample Report

Report Parameters

Account:
For: 8/11/2017 - 8/11/2017 11:59:59 PM
: All

Detail Visit Status Report

Account:
Payer: None
Program: None
SPV: None
Status: Incomplete

						Scheduled		Call		Adjusted		
Visit ID	**Medicaid ID**	**Client**	**Employee**	**Service**	**Date**	**Start**	**End**	**In**	**Out**	**In**	**Out**	**Exceptions**
1763806069			Doe, John		08/11/2017				10:22 AM			Unknown Clients, Visits Without In-Calls
1763806512			Doe, John		08/11/2017				10:25 AM			Client Signature Exception, Service Verification Exception, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
1763820813			Mir, Roman		08/11/2017				11:30 AM			Client Signature Exception, Missing Service, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
Sub Total # of Visits: 3												

Sandata 8/11/2017 12:53:45 PM Page 3 of 4

Detail Visit Status Report

Employee Activity

Description:

This report shows visit activity for each employee with each employee's information displayed on its own page. The report displays information about visits performed by the employee for the selected date range. The maximum date range of this report is 31 days.

Use:

Use this report to review visit activity by employee. The report shows the detailed employee visit history. It can be used to monitor employee trends for late visits and tasks being performed. Times shown for the visit are based on the final visit times, using actual times or adjusted times if any adjustments occurred.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency
Employee ID	the employee's ID number
Employee Name	the employee's name
Employee Santrax ID	the employee's Santrax ID

Report Output

Each column of the report displays:

Columns	Description
Client ID	the Sandata client ID
Client Name	the client's name

Columns	Description
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Visit Date	the date of the visit
Schedule Start	the scheduled start time for the visit
Start	the actual or the manually entered start time for the visit If no adjustment was made, the actual start time displays.
End	the actual or the manually entered end time for the visit If no adjustment was made, the actual start time displays.
Hours	the duration of the visit in hours based on either the adjusted or actual times
Late Minutes	the difference between the scheduled and actual/manually entered start time (in minutes) If no adjustment was made, the actual start time displays.
Service	the service code for the visit

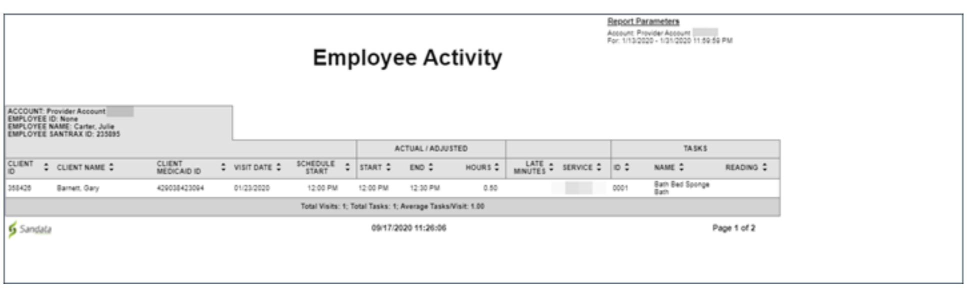
Tasks:

Tasks repeat as many times as needed to display all tasks entered for the visit.

Each column of the report displays:

Columns	Description
ID	the task ID
Name	the task name
Reading	any reading entered for the task
Total Visits	the total number of visits performed by the employee
Total Tasks	the total number of tasks entered by the employee
Average Tasks/Visit	the average number of tasks performed per visit

Sample Report



Employee Activity – Sample

Employee Visit Log

Description:

This report shows a log of all visit activity for employees. The report displays information about the visit, employee and client. Each payer receives its own page. The maximum date range for this report is 31 days.

Use:

Use this report to view detailed information about the visit. This report includes standard visit information, as well as the status of the visit, the location of the visit, any visit notes entered using a mobile device and tasks. This report can be exported to excel to allow for sorting and filtering. Schedules are not shown on this report.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Payer	the payer

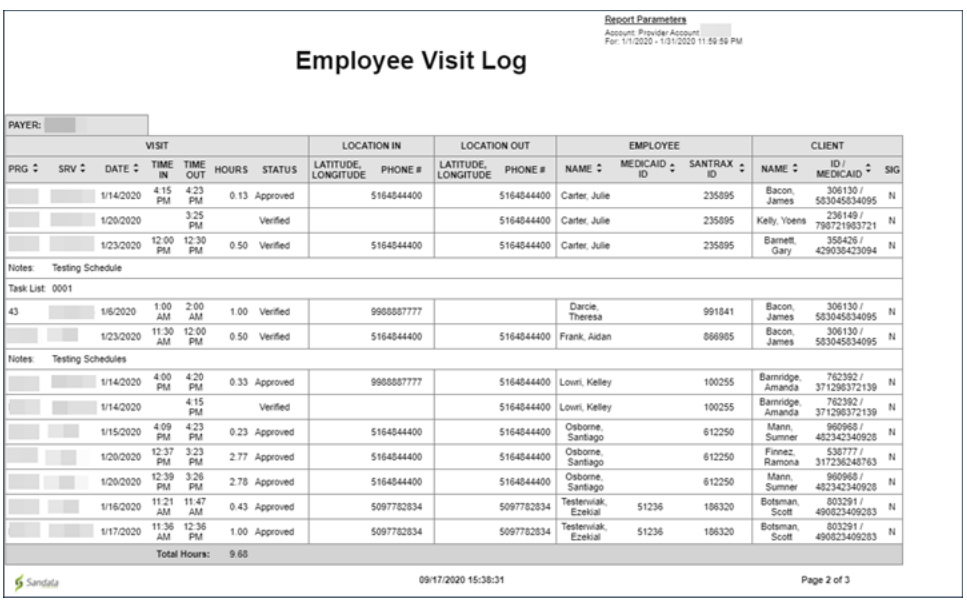
Report Output

Each column of the report displays:

Columns	Description
Visit: PRG	the program for the visit
Visit: SRV	the service for the visit
Visit: Date	the date of the visit
Visit: Time In	the actual or the manually entered start time for the visit If no adjustment was made, the actual start time displays.
Visit: Time Out	the actual or the manually entered end time for the visit. If no adjustment was made, the actual end time displays.

Columns	Description
Visit: Hours	the calculated duration for the visit in hours
Visit: Status	the status of the visit
Location In: Latitude, Longitude	the latitude and longitude of the primary address displayed in the report This value only displays for visits captured with a mobile device.
Location In: Phone #	the EVV phone number from which the call was made
Location Out: Latitude, Longitude	the latitude and longitude of the primary address displayed in the report This value only displays for visits captured with a mobile device.
Employee: Name	the employee's name
Employee: Medicaid ID	the state or payer assigned identifier for the employee
Employee: Santrax ID	the employee's Santrax ID
Client: Name	the client's name
Client: ID/Medicaid	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
SIG	indicates if a signature was recorded for this client for the visit

Sample Report


Report Parameters
Account: Provider Account
For: 1/1/2020 - 1/31/2020 11:59:59 PM

Employee Visit Log

PAYER:

VISIT							LOCATION IN		LOCATION OUT		EMPLOYEE			CLIENT		
PRG	SRV	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	MEDICAID ID	SANTRAX ID	NAME	ID / MEDICAID	SIG
		1/14/2020	4:15 PM	4:23 PM	0.13	Approved		5164844400		5164844400	Carter, Julie		235895	Bacon, James	306130 / 583045834095	N
		1/20/2020		3:25 PM		Verified				5164844400	Carter, Julie		235895	Kelly, Yoens	236149 / 798721983721	N
		1/23/2020	12:00 PM	12:30 PM	0.50	Verified		5164844400		5164844400	Carter, Julie		235895	Barnett, Gary	358426 / 429038423094	N
Notes:	Testing Schedule															
Task List:	0001															
43		1/6/2020	1:00 AM	2:00 AM	1.00	Verified		9988887777			Darcie, Theresa		991841	Bacon, James	306130 / 583045834095	N
		1/23/2020	11:30 AM	12:00 PM	0.50	Verified		5164844400		5164844400	Frank, Aidan		866985	Bacon, James	306130 / 583045834095	N
Notes:	Testing Schedules															
		1/14/2020	4:00 PM	4:20 PM	0.33	Approved		9988887777		5164844400	Lowri, Kelley		100255	Bamridge, Amanda	762392 / 371298372139	N
		1/14/2020		4:15 PM		Verified				5164844400	Lowri, Kelley		100255	Bamridge, Amanda	762392 / 371298372139	N
		1/15/2020	4:09 PM	4:23 PM	0.23	Approved		5164844400		5164844400	Osborne, Santiago		612250	Mann, Sumner	960968 / 482342340928	N
		1/20/2020	12:37 PM	3:23 PM	2.77	Approved		5164844400		5164844400	Osborne, Santiago		612250	Finnez, Ramona	538777 / 317236248763	N
		1/20/2020	12:39 PM	3:26 PM	2.78	Approved		5164844400		5164844400	Osborne, Santiago		612250	Mann, Sumner	960968 / 482342340928	N
		1/16/2020	11:21 AM	11:47 AM	0.43	Approved		5097782834		5097782834	Testerwiak, Ezekial	51236	186320	Botsman, Scott	803291 / 490823409283	N
		1/17/2020	11:36 AM	12:36 PM	1.00	Approved		5097782834		5097782834	Testerwiak, Ezekial	51236	186320	Botsman, Scott	803291 / 490823409283	N
				Total Hours:	9.68											

Sandata 09/17/2020 15:38:31 Page 2 of 3

Employee Visit Log – Sample

Expanded Visit Sum (Cli)

Description:

This report shows an expanded summary of all visits for the selected date range. The report is broken out by client, with each change in client starting a new page. The visit dates, start/end times and other general information about the client's visits are included. The maximum date range of this report is 730 days. Subtotals are listed by date.

Use:

Use this report to review visit activity for clients over a selected date range. This report allows users to view client activity across all workers. The report can be used to support billing when there are rol-lups by member and date.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	Employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency
SPV	the supervisor at the provider agency
Client ID	the Sandata client ID
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID

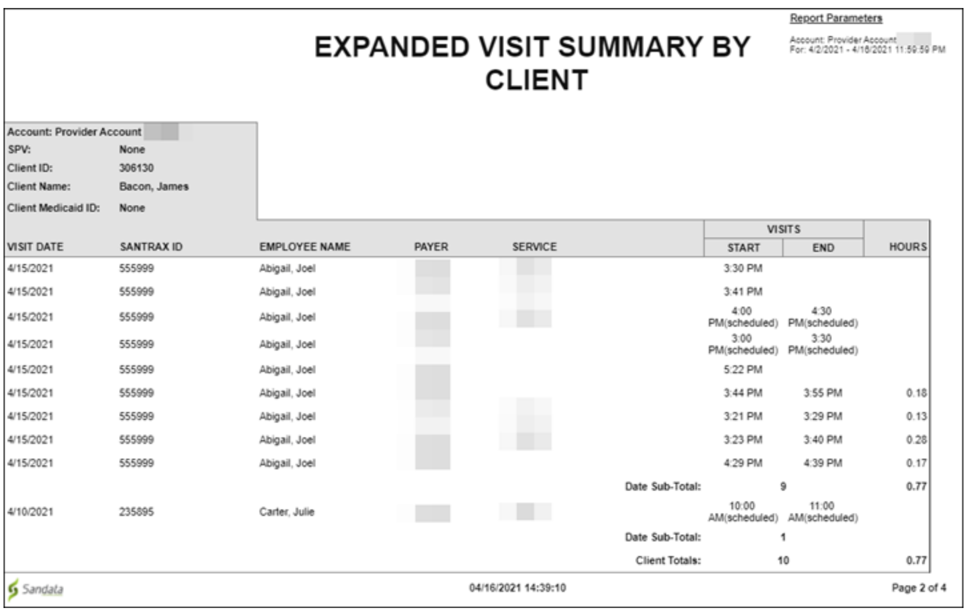
Report Output

Each column of the report displays:

Sample Report

Columns	Description
Visit Date	the visit date
Santrax ID	the employee's Santrax ID
Employee Name	the employee's name
Payer	the payer for the related visit
Service	the service performed for the visit
Visits: Start	the start time of the visit
Visits: End	the end time of the visit
Hours	the length of the visit in hours
Date Sub-Total	the sub total of visits that occurred on that day
Client Totals	the total number of visits performed for the client over the selected date range

Sample Report



Report Parameters

Account: Provider Account
For: 4/2/2021 - 4/16/2021 11:59:59 PM

EXPANDED VISIT SUMMARY BY CLIENT

Account: Provider Account	
SPV:	None
Client ID:	306130
Client Name:	Bacon, James
Client Medicaid ID:	None

VISIT DATE	SANTRAX ID	EMPLOYEE NAME	PAYER	SERVICE		VISITS START	VISITS END	HOURS
4/15/2021	555999	Abigail, Joel				3:30 PM		
4/15/2021	555999	Abigail, Joel				3:41 PM		
4/15/2021	555999	Abigail, Joel				4:00 PM(scheduled)	4:30 PM(scheduled)	
4/15/2021	555999	Abigail, Joel				3:00 PM(scheduled)	3:30 PM(scheduled)	
4/15/2021	555999	Abigail, Joel				5:22 PM		
4/15/2021	555999	Abigail, Joel				3:44 PM	3:55 PM	0.18
4/15/2021	555999	Abigail, Joel				3:21 PM	3:29 PM	0.13
4/15/2021	555999	Abigail, Joel				3:23 PM	3:40 PM	0.28
4/15/2021	555999	Abigail, Joel				4:29 PM	4:39 PM	0.17
					Date Sub-Total:	9		0.77
4/10/2021	235895	Carter, Julie				10:00 AM(scheduled)	11:00 AM(scheduled)	
					Date Sub-Total:	1		
					Client Totals:	10		0.77

Sandata 04/16/2021 14:39:10 Page 2 of 4

Expanded Visit Summary by Client - Sample

Expanded Visit SUM (Emp)

Description:

This report shows an expanded view of all visits for the selected date range. The report is broken out by employee, with each change in employee starting a new page. The visit dates, start/end times and other general information about the employee's visits are included. The maximum date range of this report is 730 days.

Use:

Use this report to review all employee activity to support payroll and understand how many hours specific employees are working.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	Employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency
Employee ID	the employee's ID
Employee Name	the employee's name

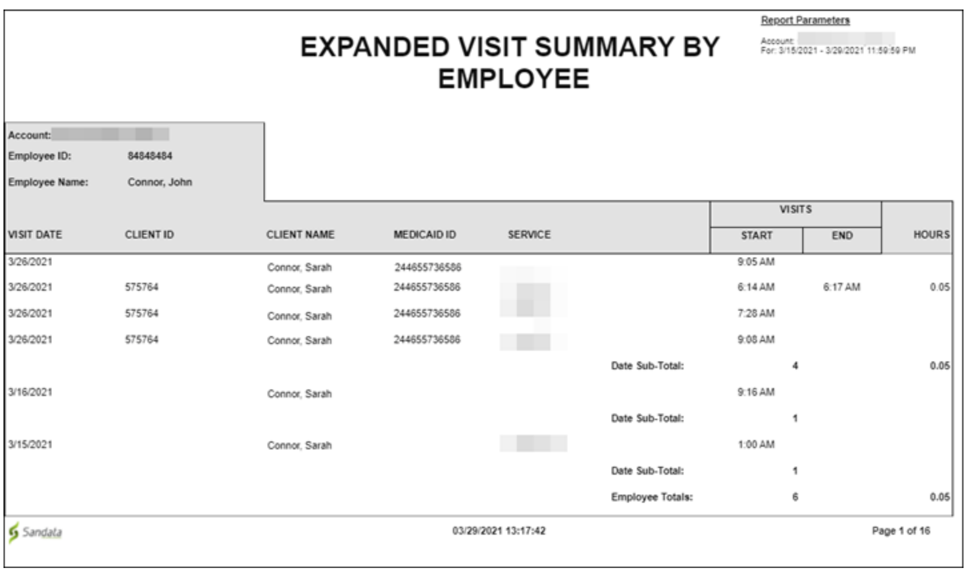
Report Output

Each column of the report displays:

Columns	Description
Visit Date	the date of the visit

Columns	Description
Client ID	the Sandata client ID
Client Name	the client's name. Blank if unknown.
Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Service	the service performed for the visit
Visit: Start	the start time of the visit (if an adjusted value exists, it is displayed here. if no adjusted value exists then the actual start time is displayed)
Visit: End	the end time of the visit (if an adjusted value exists, it is displayed here. If no adjusted value exists then the actual end time is displayed)
Hours	the duration of the visit in hours

Sample Report



EXPANDED VISIT SUMMARY BY EMPLOYEE

Report Parameters
Account:
For: 3/15/2021 - 3/29/2021 11:59:59 PM

Account:
Employee ID: 84848484
Employee Name: Connor, John

VISIT DATE	CLIENT ID	CLIENT NAME	MEDICAID ID	SERVICE	VISITS START	VISITS END	HOURS
3/26/2021		Connor, Sarah	244655736586		9:05 AM		
3/26/2021	575764	Connor, Sarah	244655736586		6:14 AM	6:17 AM	0.05
3/26/2021	575764	Connor, Sarah	244655736586		7:28 AM		
3/26/2021	575764	Connor, Sarah	244655736586		9:08 AM		
				Date Sub-Total:	4		0.05
3/16/2021		Connor, Sarah			9:16 AM		
				Date Sub-Total:	1		
3/15/2021		Connor, Sarah			1:00 AM		
				Date Sub-Total:	1		
				Employee Totals:	6		0.05

Sandata 03/29/2021 13:17:42 Page 1 of 16

Expanded Visit Summary by Employee- Sample

Full Visit Export

Description:

This report produces a comma separated file or an excel spreadsheet that includes details for all visits that occurred within the selected date range. This includes all details about the visit including call in/call out times, exceptions, employee and client information and other data points. If specific data items are not collected by the program, that field will be blank on the report output. This report can be run for a maximum of 31 days.

Use:

Use this export to create an easily sortable list of all visits that occurred within the selected date range. This information can also be used to populate a third-party data store including agency management systems, payroll systems and/or a data warehouse.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered, the report displays results that begin with the entered characters.

Report Output

Each column of the report displays:

Columns	Description
Account	the provider agency's Sandata EVV account number
Account Number	the account name
Visit Source	indicates the source of the visit (Sandata or the Alt EVV vendor providing the information)
Payer	the payer for the visit

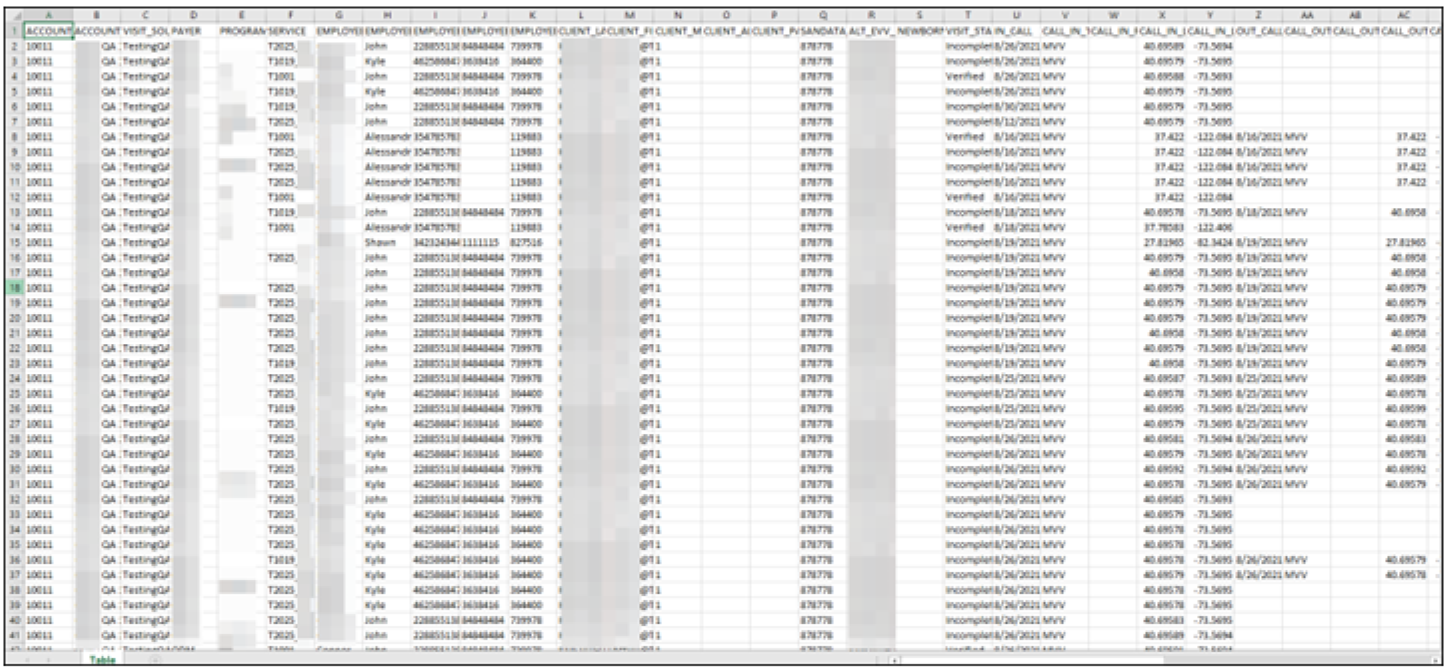
Columns	Description
Program	the program for the visit
Service	the service for the visit
Employee Last Name	the last name of the employee
Employee First Name	the first name of the employee
Employee SNN	the employee's social security number
Employee ID	the employee's ID
Employee Santrax ID	the employee's Santrax ID
Client Last Name	the client's last name
Client First Name	the client's first name
Client Medicaid ID	the client's Medicaid ID
Client Alternate Medicaid ID	the client's Medicaid and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Client Payer ID	the client's payer ID
Sandata Client ID	the Sandata client ID
ALT EVV Client ID	the client's ID from an alternate EVV system
Newborn	indicates if the client is a newborn
Visit Status	the status of the visit
In Call	the date and time the call in was received
Call In Type	the call type used to place the call in (TVV/MVV/Manu-al/Other)
Call In Phone	the phone number from which the call in was made, if applic-able
Call In Latitude	the latitude of the location the call in was made from. This value only displays for visits captured by a mobile device
Call in Longitude	the longitude of the location the call in was made from. This value only displays for visits captured by a mobile device
Out Call	the date and time the call out was received
Call Out Type	the call type used to place the call out (TVV/MVV/Manu-al/Other)
Call Out Phone	the phone number from which the call out was made, if applicable
Call Out Latitude	the latitude of the location the call out was made from. This value only displays for visits captured by a mobile device

Columns	Description
Call Out Longitude	the longitude of the location the call out was made from. This value only displays for visits captured by a mobile device
Adjusted In Time	the manually entered start time of the visit
Adjusted Out Time	the manually entered end time of the visit
Actual Time	the total duration of the visit based on actual call times
Adjusted Time	the total duration of the visit based on manually entered call times
Bill Time	the total billable time for the visit
Units	the total billable units for the related visit, if applicable
Group Visit	indicates whether or not the visit was a Group Visit
Group Visit Code	the group visit coded associated with the visit, if applicable
GPS Exception	indicates whether or not the visit was flagged with a GPS exception This field is blank if the GPS Exception is not enabled.
GPS Call In Distance	the distance in feet from the client's closest address
GPS Call Out Distance	the distance in feet from the client's closest address
Client Signature	indicates if a signature was recorded for this client for the visit
Client Signature Type	indicates the type of signature recorded for the visit (Voice or Written)
Client Verified Time	indicates whether the client verified the time of the visit
Client Verified Service	indicates whether the client verified the service
Unknown Client Exception	indicates whether the visit is flagged with an exception caused by an unknown client
Unknown Employee Exception	indicates whether the visit is flagged with an exception caused by an unknown employee
Visit WO In Call Exception	indicates whether the visit is flagged with an exception caused by a missing in call
Visit WO Out Call Exception	indicates whether the visit is flagged with an exception caused by a missing out call
Unmatched ClientID Phone Exception	indicates whether the visit is flagged with an exception caused by a mismatched phone number
Missing Service Exception	indicates whether the visit is flagged with an exception caused by a missing service

Sample Report

Columns	Description
Unauthorized Service Exception	indicates whether the visit is flagged with an exception caused by an unauthorized service
Visit Verification Exception	indicates whether the visit is flagged with an exception caused by the client not verifying the start and end times of the visit
Total Original Exceptions	the total number of exceptions originally applied to visits
Total Current Exceptions	the total number of exceptions currently applied to visits
Provider ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)

Sample Report



Full Visit Export - Sample

Hours Worked Summary

Description:

This report shows a summary view of all hours worked by employees for the selected date range. The maximum date range for this report is 31 days.

Use:

This report can be used by an agency to review the amount of time being spent by field staff on visits. The report can help payers review how much times agencies are spending on visits on average. This report is limited to verified or processed visits and does not include visits which are still in process or that are flagged with exceptions.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency Sandata EVV account number
Provider ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)

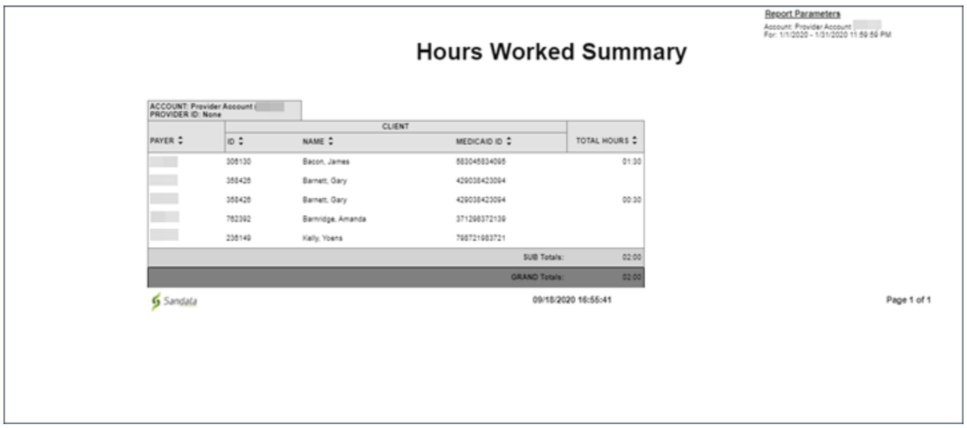
Report Output

Each column of the report displays:

Columns	Description
Payer	the payer for the visit
Client: ID	the Sandata client ID
Client: Name	the client's name

Columns	Description
Client: Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID In some programs, this could be a custom Payer ID. If newborn support is enabled and the client is flagged as a newborn, shown as "N.”
Total Hours	the total number of hours for each client
SUB Totals	the total number of all hours worked by employees
GRAND Total	the grand total of hours worked by the employee

Sample Report


Report Parameters
Account: Provider Account
For: 1/1/2020 - 1/31/2020 11:59:59 PM

Hours Worked Summary

ACCOUNT: Provider Account
PROVIDER ID: None

PAYER	CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	TOTAL HOURS
	306130	Bacon, James	583045834095	01:30
	358426	Barnett, Gary	429038423094	
	358426	Barnett, Gary	429038423094	00:30
	762392	Barnridge, Amanda	371298372139	
	236149	Kelly, Yoens	798721983721	
			SUB Totals:	02:00
			GRAND Totals:	02:00

Sandata 09/18/2020 16:55:41 Page 1 of 1

Hours Worked Summary - Sample

Individual Client Activity Report

Description:

This report shows visit activity for clients for a selected date range, with each client on their own page. The report displays scheduled versus actual hours, tasks, services and information about the employee who performed the visit. The maximum date range for this report is 31 days.

Use:

Use this report to review visit activity by client and compare scheduled times to actual times. This report shows the services being provided to specific clients over the course of the month. Tasks performed are displayed to show the specific activities being provided to the client.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID

Report Output

Each column of the report displays:

Columns	Description
Employee Name	the employee's name
Employee Santrax ID	the employee's Santrax ID
Visit Date	the date of the visit

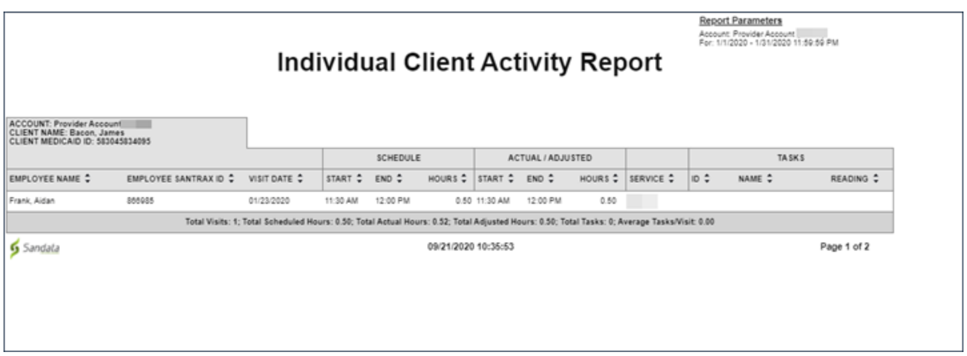
Columns	Description
Schedule: Start	the scheduled start time for the visit
Schedule: End	the scheduled end time for the visit
Schedule: Hours	the total hours scheduled for the visit
Actual/Adjusted: Start	the actual/manually entered start time for the visit
Actual/Adjusted: End	the actual/manually entered end time for the visit
Actual/Adjusted: Hours	the actual/manually entered hours elapsed for the visit
Service	the service performed for the visit

Tasks

Each column of the report displays:

Columns	Description
ID	the task ID
Name	the task name
Reading	any reading entered for the task
Total Visits	the total number of visits for the client over the selected date range
Total Scheduled Hours	the total number of scheduled hours for the client over the selected date range
Total Actual Hours	the total number of actual hours for the client over the selected date range
Total Adjusted Hours	the total number of manually entered hours for the client over the selected date range
Total Tasks	the total number of tasks
Average Tasks/Visit	the average number of tasks performed for the visit

Sample Report



Report Parameters
Account: Provider Account
For: 1/1/2020 - 1/31/2020 11:59:59 PM

Individual Client Activity Report

ACCOUNT: Provider Account
CLIENT NAME: Bacon, James
CLIENT MEDICAID ID: 583045834095

			SCHEDULE			ACTUAL / ADJUSTED				TASKS		
EMPLOYEE NAME	EMPLOYEE SANTRAX ID	VISIT DATE	START	END	HOURS	START	END	HOURS	SERVICE	ID	NAME	READING
Frank, Aidan	866985	01/23/2020	11:30 AM	12:00 PM	0.50	11:30 AM	12:00 PM	0.50				

Total Visits: 1; Total Scheduled Hours: 0.50; Total Actual Hours: 0.52; Total Adjusted Hours: 0.50; Total Tasks: 0; Average Tasks/Visit: 0.00

Sandata 09/21/2020 10:35:53 Page 1 of 2

Individual Client Activity Report - Sample

Late and Missed Visit Detail

Description:

This report displays a listing of all late or missed visits that occurred within the selected date rate. The report shows whether the visit was late (the call in was received after the scheduled start time) or missed (no call in was received for the schedule). The report includes general information about the visit, including client and employee information. The scheduled start, actual and adjusted start times are also shown on this report as well as whether or not the visit was rescheduled.

Use:

Use this report to gauge an agencies schedule compliance. This report allows users to track both late and missed visits to ensure clients received care as scheduled. Users can also review actual recorded times versus the adjusted times entered to assist in determining if visits are regularly being adjusted to match the scheduled times.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Output

Each column of the report displays:

Columns	Description
Provider ID	The state assigned identifier for the provider (e.g Provider Medicaid ID)
Late Type	indicates whether the visit was LATE or MISSED
Payer	the payer for the related visit

Report Output

Columns	Description
Program	the program for the visit
Service	the service performed for the visit
Client: ID	the client's ID number
Client: Name	the client's name
Client: Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Employee: ID	the employee ID
Employee: Name	the employee's name
Scheduled Start	the scheduled start time of the visit
Actual: Start	the actual start time of the visit
Actual: Late Minutes	the difference between the scheduled and actual start times showing if the employee was late based on the scheduled start
Adjusted: Start	the adjusted start time of the visit
Adjusted: Late Minutes	the difference between the scheduled and adjusted start times showing if the employee was late based on the sched-uled start
Reschedule	N=No or Y=Yes, indicating whether there the visit was res-cheduled from an earlier visit
Reason Code(s)	any reason codes applied when editing the related visit
Resolution Code(s)	any resolution codes applied when editing the related visit

Sample Report

Report Parameters

Account: Provider Account ( )
For: 4/10/2021 - 4/16/2021 11:59:59 PM

Late and Missed Visit Detail

					CLIENT			EMPLOYEE			ACTUAL		ADJUSTED		
PROVIDER ID	LATE TYPE	PAYER	PROGRAM	SERVICE	ID	NAME	MEDICAID ID	ID	NAME	SCHEDULED START	START	LATE MINUTES	START	LATE MINUTES	RESCHEDULE
	MISSED	CTDSS	CTCDS	1020Z	306130	Bacon, James	583045834095	235895	Carter, Julie	04/10/2021 10:00 AM					N
				REASON CODE(S)											
				10											
				RESOLUTION CODE(S)											
				WDM											
	MISSED	CTDSS	CTCDS	1212M	306130	Bacon, James	583045834095	555999	Abigail, Joel	04/15/2021 04:00 PM					N
				REASON CODE(S)											
				RESOLUTION CODE(S)											
	MISSED	CTDSS			306130	Bacon, James	583045834095	555999	Abigail, Joel	04/15/2021 03:00 PM					N
				REASON CODE(S)											
				RESOLUTION CODE(S)											
	MISSED	INFSSA			358426	Barnett, Gary	429038423094	555999	Abigail, Joel	04/10/2021 12:00 AM					N
				REASON CODE(S)											
				RESOLUTION CODE(S)											

TOTAL OF LATE VISITS: 0
TOTAL OF MISSED VISITS: 4

Sandata 04/16/2021 16:23:19 Page 1 of 1

Late and Missed Visit Detail – Sample

Observation Question Report

Description:

This report displays the details of the responses provided to observation questions entered using Sandata Mobile Connect. The report is broken out with each client receiving their own page. It displays the date of the visit, the employee who performed the visit and the observation questions and responses recorded during the visit. Each question is displayed in a separate column.

Use:

Use this report to assist in understanding responses to observation questions over time. This information can assist in monitoring trends and to review how different employees answer the same question. This ability to track trends increases the value of the collected observation information.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Employee	Employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Client Name	the client's name. Blank if unknown.
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".

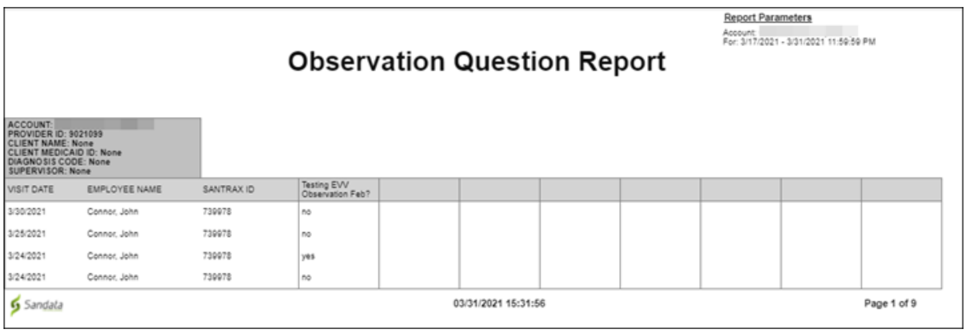
Field	Description
Diagnosis Code	The diagnosis code and brief description, if available
Supervisor	The supervisor at the provider agency

Report Output

Each column of the report displays:

Columns	Description
Visit Date	the date of the visit
Employee Name	the employee’s name Blank if unknown.
Santrax ID	the employee's Santrax ID
Observation Questions	the observation questions and responses recorded during the visit Each observation question is displayed in it’s own column.

Sample Report



Report Parameters
Account:
For: 3/17/2021 - 3/31/2021 11:59:59 PM

Observation Question Report

ACCOUNT:
PROVIDER ID: 9021099
CLIENT NAME: None
CLIENT MEDICAID ID: None
DIAGNOSIS CODE: None
SUPERVISOR: None

VISIT DATE	EMPLOYEE NAME	SANTRAX ID	Testing EVV Observation Feb?							
3/30/2021	Connor, John	739978	no							
3/25/2021	Connor, John	739978	no							
3/24/2021	Connor, John	739978	yes							
3/24/2021	Connor, John	739978	no							

Sandata 03/31/2021 15:31:56 Page 1 of 9

Observation Question Report - Sample

Payroll Summary by Client

Description:

This report shows a summary view of payroll information, sorted by client. The report is broken out by client with each change in client starting a new page. The report includes the number of visits performed for the client, basic visit information and payable hours in decimal and fractional formats.

Use:

Use this report to review payroll information by client. This report is used to understand the impact of specific clients on overall agency payroll.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Client ID	Sandata Client ID
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID

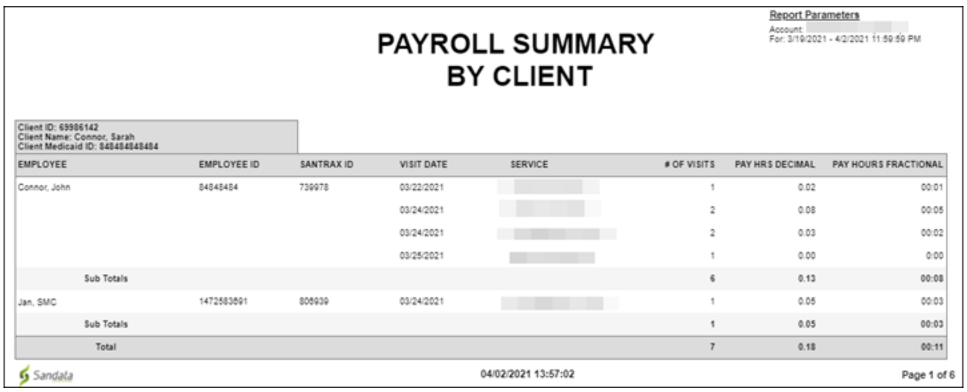
Report Output

Each column of the report displays:

Sample Report

Columns	Description
Employee	the employee's name
Employee ID	the employee's ID number
Santrax ID	the employee's Santrax ID
Visit Date	the date of the visit
Service	the service performed for the visit
# of Visits	the number of visits
Pay Hrs Decimal	the pay hours in decimal numbers
Pay Hrs Fractional	the pay hours in fractional numbers

Sample Report



Report Parameters
Account: [illegible]
For: 3/19/2021 - 4/2/2021 11:59:59 PM

PAYROLL SUMMARY
BY CLIENT

Client ID: 69986142
Client Name: Connor, Sarah
Client Medicaid ID: 848484848484

EMPLOYEE	EMPLOYEE ID	SANTRAX ID	VISIT DATE	SERVICE	# OF VISITS	PAY HRS DECIMAL	PAY HOURS FRACTIONAL
Connor, John	84848484	739978	03/22/2021	[illegible]	1	0.02	00:01
			03/24/2021	[illegible]	2	0.08	00:05
			03/24/2021	[illegible]	2	0.03	00:02
			03/25/2021	[illegible]	1	0.00	0:00
Sub Totals					6	0.13	00:08
Jan, SMC	1472583691	806939	03/24/2021	[illegible]	1	0.05	00:03
Sub Totals					1	0.05	00:03
Total					7	0.18	00:11

Sandata 04/02/2021 13:57:02 Page 1 of 6

Payroll Summary by Client - Sample

Payroll Summary (Emp)

Description:

This report shows a summary view of payroll information, sorted by employee. The report is broken out by employee with each change in employee starting a new page. The report includes the number of visits performed by the employee, basic visit information and payable hours in decimal and fractional numbers.

Use:

Use this report to review payroll information by employee. This report can be compared to actual payroll or exported to support payroll operations as necessary.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	The client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Supervisor	the supervisor code from the client(s) at the provider agency
Department	the selected department
Employee	Employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Employee ID	the employee ID
Santrax ID	the employee's Santrax ID
Employee Name	the employee's name

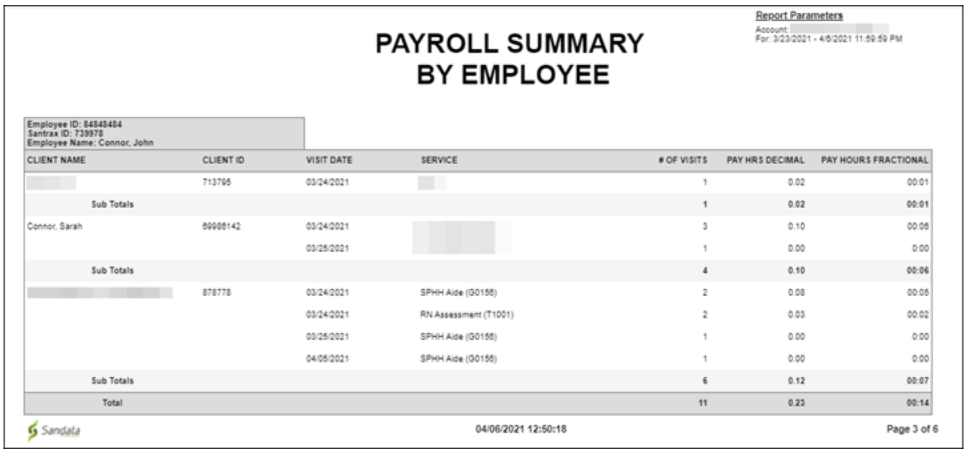
Report Output

Each column of the report displays:

Sample Report

Columns	Description
Client Name	the client's name. Blank if unknown.
Client ID	the Sandata client ID
Visit Date	the date of the visit
Service	the service performed for the visit
# of Visits	the number of visits
Pay Hrs Decimal	the pay hours in decimal numbers
Pay Hrs Fractional	the pay hours in fractional numbers

Sample Report



Report Parameters
Account:
For: 3/23/2021 - 4/6/2021 11:59:59 PM

PAYROLL SUMMARY
BY EMPLOYEE

Employee ID: 84848484
Santrax ID: 739978
Employee Name: Connor, John

CLIENT NAME	CLIENT ID	VISIT DATE	SERVICE	# OF VISITS	PAY HRS DECIMAL	PAY HOURS FRACTIONAL
	713795	03/24/2021		1	0.02	00:01
Sub Totals				1	0.02	00:01
Connor, Sarah	69986142	03/24/2021		3	0.10	00:06
		03/25/2021		1	0.00	0:00
Sub Totals				4	0.10	00:06
	878778	03/24/2021	SPHH Aide (G0156)	2	0.08	00:05
		03/24/2021	RN Assessment (T1001)	2	0.03	00:02
		03/25/2021	SPHH Aide (G0156)	1	0.00	0:00
		04/05/2021	SPHH Aide (G0156)	1	0.00	0:00
Sub Totals				6	0.12	00:07
Total				11	0.23	00:14

Sandata 04/06/2021 12:50:18 Page 3 of 6

Payroll Summary by Employee- Sample

Plan of Care Listing

Description:

This report shows the summarized plan of care for visits scheduled during a selected date range. The maximum date range for this report is 730 days.

Use:

Use this report to review the plan of care for visits scheduled during the selected date range. This report allows users to see when each Plan of Care expires (the end date) for each client and service. The report also shows the days per week and hours per day to help agency staff ensure visits are scheduled appropriately.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	plans of care with client by name (last name, first name) or Sandata Client ID. When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	the client Medicaid ID

Report Output

Each column of the report displays:

Columns	Description
Payer	the payer for the plan of care
Program	the program for the plan of care
Service	the service for the plan of care
Client: ID	the Sandata client ID
Client: Name	the client's name
Client: Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Start Date	the start date of the client's plan of care

Columns	Description
End Date	the end date of the client's plan of care When no end date is selected, the end date displays as 2099 or 2999.
Days Per Week	the number of days a week where visits are expected based on the plan of care
Hours Per Day	the number of hours per day where visits are expected based on the plan of care
Total Hours	the total number of hours per week where visits are expected based on the plan of care

Sample Report

Report Parameters
Account: [illegible]
For: 9/9/2020 - 9/23/2020 11:59:59 PM

Plan of Care Listing

			CLIENT					DAYS	HOURS	TOTAL
PAYER	PROGRAM	SERVICE	ID	NAME	MEDICAID ID	START DATE	END DATE	PER WEEK	PER DAY	HOURS
[illegible]	Indiana	[illegible]	306130	Bacon, James	583045834095	09/23/2020	12/31/2999	3	0	0
[illegible]		[illegible]	358426	Barnett, Gary	429038423094	09/23/2020	09/30/2020	2	0	0
[illegible]		[illegible]	538777	Finnez, Ramona	317236248763	09/23/2020	12/31/2999	2	0	0
[illegible]	Indiana	[illegible]	803291	Botsman, Scott	490823409283	09/23/2020	12/31/2999	3	0	0

Sandata 09/23/2020 14:04:43 Page 1 of 1

Plan of Care Listing - Sample

Plan of Care Over-Under Served Report

Description:

This report shows the plan of care requirements and if they were over or under served during a specific date range grouped by client. The report displays the client's identification information, the plan of care details and if the plan of care conditions were met. The maximum date range for this report is 31 days.

Use:

This report allows users to compare the planned activities (plan of care) to the actual tasks logged for each visit during selected date range. If more tasks were performed than scheduled, Over displays in the last column. If less tasks were performed than scheduled, Under displays in the last column. This report allows agency and payer users to view overall client care and identify gaps occurring within the visits. Poor plan of care compliance could mean poor outcomes for a client and would need to be investigated to determine if the plan of care needs to be updated, the caregiver needs to understand the activities that need to happen or if other action is needed.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Provider ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)
Account	the provider agency's Sandata EVV account number
Client ID	the Sandata client ID
Client Name	the client's name

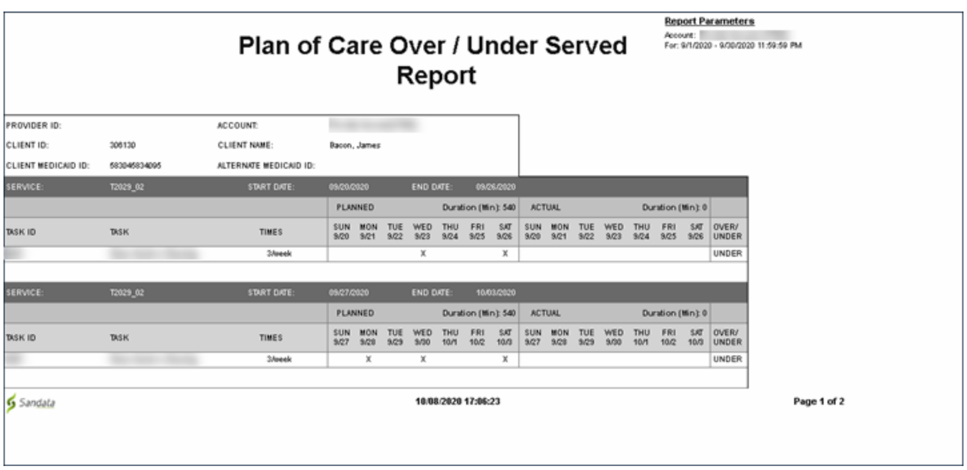
Field	Description
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Alternate Medicaid ID	the client's Alternate Medicaid ID if available

Report Output

Each column of the report displays:

Columns	Description
Service	the service performed for the visit
Start Date	the start of the week displayed If more than a week is selected or the selected week doesn't match to the week for the Plan of Care, multiple sections display for a single client for each week.
End Date	the end of the week displayed
Task ID	the ID of the task entered during telephony
Task	the name of the task
Times	the number of times the task should be performed
Planned Duration	the number of times the task should be performed
Actual Duration	the actual amount of time for each task This field only displays for tasks configured to require a reading.
Over / Under	if the client was over or under served based on the plan of care and the tasks entered for the visit

Sample Report



Plan of Care Over / Under Served Report – Sample

Schedules by Client

Description:

This report shows all schedules for a selected date range. The report is grouped by client with each client receiving their own page. The report displays the employee and client's name and identification information as well as the visit information. The maximum date range on this report is 31 days.

Use:

Use this report to review and verify client schedules for a selected date range. Users can print this report for a client or client designee review all upcoming schedules.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Client	only those visits with the entered client by name (format: last name, first name). When a partial value is entered the report will display results that begin with the entered value.
Client Medicaid ID	the client's Medicaid ID

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number
Provider	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Client Name	the client's name
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Address	the client's primary address

Report Output

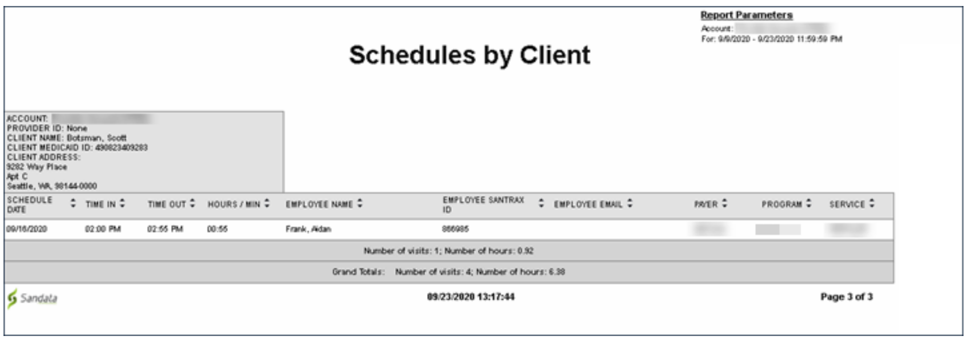
Each column of the report displays:

Columns	Description
Schedule Date	the scheduled date of the visit
Time In	the scheduled start time for the visit
Time Out	the scheduled end time for the visit
Hours / Min	the scheduled length of the visit in hours and minutes

Sample Report

Columns	Description
Employee Name	the employee's name
Employee Santrax ID	the employee's Santrax ID
Employee Email	the employee's email address
Payer	the payer for the visit
Program	the program for the visit
Service	the service scheduled for the visit
Number of visits	the number of visits scheduled for the client
Number of hours	the total duration of visits scheduled for the client
Grand Totals	the total of all visits for all clients

Sample Report



Report Parameters
Account:
For: 9/9/2020 - 9/23/2020 11:59:59 PM

Schedules by Client

ACCOUNT:
PROVIDER ID: None
CLIENT NAME: Botsman, Scott
CLIENT MEDICAID ID: 490823409283
CLIENT ADDRESS:
9282 Way Place
Apt C
Seattle, WA, 98144-0000

SCHEDULE DATE	TIME IN	TIME OUT	HOURS / MIN	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	EMPLOYEE EMAIL	PAYER	PROGRAM	SERVICE
09/16/2020	02:00 PM	02:55 PM	00:55	Frank, Aidan	866985				
Number of visits: 1; Number of hours: 0.92									
Grand Totals: Number of visits: 4; Number of hours: 6.38									

Sandata 09/23/2020 13:17:44 Page 3 of 3

Schedules by Client - Sample

Schedules by Employee

Description:

This report shows all schedules for a selected date range. The report is grouped by employee with each employee receiving their own page for easy distribution. The report displays the field staff and client's name and identification information as well as the visit information. The maximum date range for this report is 31 days.

Use:

Use this report to review and verify employee schedules for a selected date range. This report can be provided in hard copy (or PDF) to the employee so they have information about upcoming schedules. This allows to review upcoming activity and make any changes before the visit.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

Field	Description
Account	the provider agency's Sandata EVV account number
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Employee Name	the employee's name
Employee Santrax ID	the employee's Santrax ID
Employee Email	the employee's email address

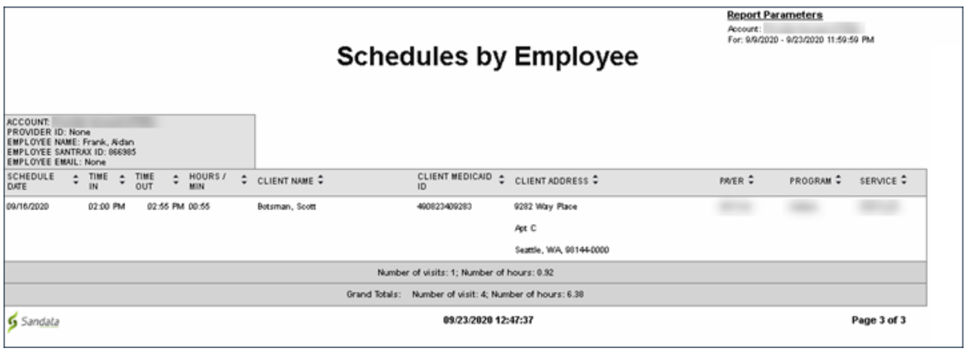
Report Output

Each column of the report displays:

Columns	Description
Schedule Date	the scheduled date of the visit
Time In	the scheduled start time for the visit
Time Out	the scheduled end time for the visit
Hours / Min	the scheduled length of the visit in hours and minutes
Client Name	the client's name

Columns	Description
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N."
Client Address	the client's primary address
Payer	the payer for the visit
Program	the program for the visit
Service	the service scheduled to be performed for the visit
Number of Visits	the number of visits scheduled for the employee
Number of Hours	the total duration of visits scheduled for the employee
Grand Totals	the total of all visits for all employees

Sample Report



Report Parameters
Account:
For: 9/9/2020 - 9/23/2020 11:59:59 PM

Schedules by Employee

ACCOUNT:
PROVIDER ID: None
EMPLOYEE NAME: Frank, Aidan
EMPLOYEE SANTRAX ID: 866985
EMPLOYEE EMAIL: None

SCHEDULE DATE	TIME IN	TIME OUT	HOURS / MIN	CLIENT NAME	CLIENT MEDICAID ID	CLIENT ADDRESS	PAYER	PROGRAM	SERVICE
09/16/2020	02:00 PM	02:55 PM	00:55	Botsman, Scott	490823409283	9282 Way Place Apt C Seattle, WA, 98144-0000			

Number of visits: 1; Number of hours: 0.92

Grand Totals: Number of visit: 4; Number of hours: 6.38

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Schedules by Employee - Sample

Summary Visit Status Report

Description:

This report is a summary view of the status of all visits based on the selected date range and parameters. The results are sorted by the duration of time each visit has remained in the same status.

Use:

Use this report to review the status of all visits within a selected date range.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program
Supervisor	the selected supervisor

Report Output

Each column of the report displays:

Columns	Description
Status	the status for the related visit
Age, <1 days, 1-5 days, 11-15 days, 16-31 days	the amount of days a visit status has remained unchanged
Total #	the total number visits for the related status

Sample Report

Report Parameters
Account:
For: 8/11/2017 - 8/14/2017 11:59:59 PM

Summary Visit Status Report

Account:
Payer: ODM
Program: None

	Age					
Status	<1 Days	1 - 5 Days	6 - 10 Days	11 - 15 Days	16 - 31 Days	Total #
In Process	0	0	0	0	0	0
Incomplete	0	12	0	0	0	12
Verified	0	15	0	0	0	15
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
Total #	0	27	0	0	0	27

Sandata 8/14/2017 9:51:25 AM Page 1 of 2

Summary Visit Status Report

Unresolved Late & Missed Visits

Description:

This report shows all unresolved late and missed visits taking place for a selected date range. The report displays the client and field staff's name and identification information. The report also displays the scheduled start time of the visit and if the call in was received after the scheduled start time. This report uses data from the schedule. For values to display in the late minutes column, the account must be configured to use the Late In Call exception and the threshold for a late call in must be defined as a parameter in the system. The maximum date range for this report is 7 days.

Use:

Use this report to review any visits marked as late or missed. The report can be used with the Contingency Plan feature to review which visits require attention. It can also be used to view visits that are either late or missed, over a selected date range. This information allows users to identify trends for specific clients or employees.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

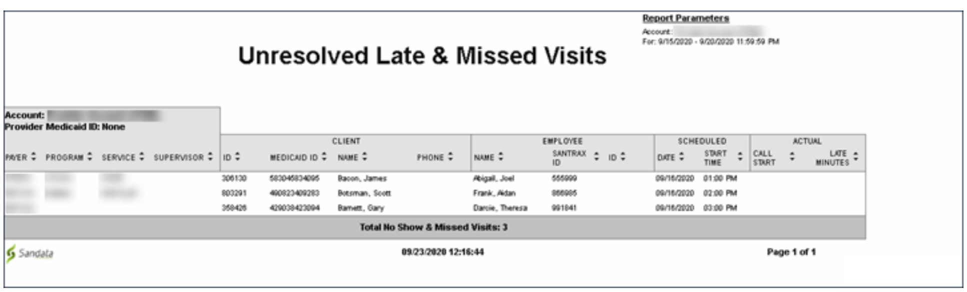
Report Output

Each column of the report displays:

Columns	Description
Payer	the client's payer from the schedule
Program	the program(s) for the visit from the schedule
Service	the service scheduled to be performed for the visit

Columns	Description
Supervisor	the client’s supervisor at the provider agency
Client: ID	the Sandata client ID
Client: Medicaid ID	the client’s Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N.”
Client: Name	the client's name
Client: Phone	the client's primary phone number
Employee: Name	the employee's name from the schedule
Employee: Santrax ID	the employee's Santrax ID
Employee: ID	the employee ID
Scheduled: Date	the scheduled start date for the visit
Scheduled: Start Time	the scheduled start time for the visit
Actual: Call Start	the call in time for the visit. This value only displays for a late visit.
Actual: Late Minutes	the difference between the scheduled and actual start times (in minutes) This value only displays for a late visit.
Total No Show & Missed Visits	the total number of no show and missed visits

Sample Report



Report Parameters
Account:
For: 9/15/2020 - 9/20/2020 11:59:59 PM

Unresolved Late & Missed Visits

Account:
Provider Medicaid ID: None

				CLIENT				EMPLOYEE			SCHEDULED		ACTUAL	
PAYER	PROGRAM	SERVICE	SUPERVISOR	ID	MEDICAID ID	NAME	PHONE	NAME	SANTRAX ID	ID	DATE	START TIME	CALL START	LATE MINUTES
				306130	583046834095	Bacon, James		Abigail, Joel	555999		09/16/2020	01:00 PM		
				803291	490823409283	Botsman, Scott		Frank, Aidan	866985		09/16/2020	02:00 PM		
				358426	429038423094	Barnett, Gary		Darcie, Theresa	991841		09/16/2020	03:00 PM		

Total No Show & Missed Visits: 3

Sandata 09/23/2020 12:16:44 Page 1 of 1

Unresolved Late & Missed Visits - Sample

Verified Hours for Payroll

Description:

This report shows the verified hours for paying field staff for a selected date range. The report displays a list of all verified visits performed by a field staff including the client names, visit information and billable amounts, sorted by employee name. The maximum date range for this report is 31 days.

Use:

Use this report to review verified hours when processing payroll for field staff or to compare actual payroll hours shown for a current or upcoming pay period. Only visits with a status of Verified or Processed display on this report. Bill and pay hours may be the same or different, depending on any adjustments made or rounding rules applied.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client’s Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

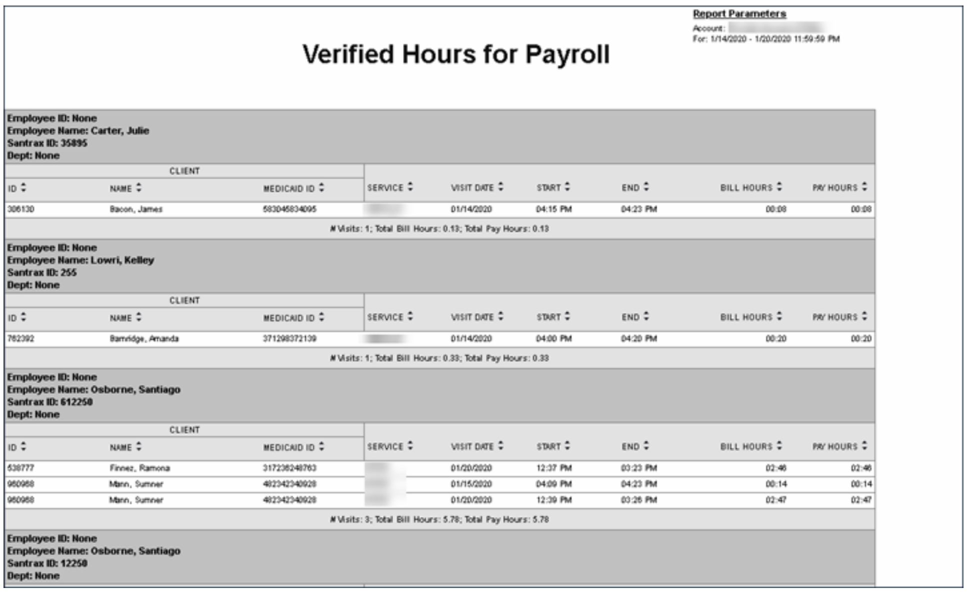
Report Output

Each column of the report displays:

Columns	Description
Employee	the employee ID
Employee Name	the employee's name
Santrax ID	the employee's Santrax ID
Dept	the employee’s department Depending on the agency’s specific configurations, this field may display a different value.
Client: ID	the Sandata client ID
Client: Name	the client's name

Columns	Description
Client: Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Service	the service performed for the visit
Visit Date	the date of the visit
Start	the actual/manually entered start time for the visit
End	the actual/manually entered end time for the visit
Bill Hours	the total billable hours for the visit
Pay Hours	the total payable hours for the visit

Sample Report



Report Parameters
Account:
For: 1/14/2020 - 1/20/2020 11:59:59 PM

Verified Hours for Payroll

Employee ID: None
Employee Name: Carter, Julie
Santrax ID: 35895
Dept: None

CLIENT								
ID	NAME	MEDICAID ID	SERVICE	VISIT DATE	START	END	BILL HOURS	PAY HOURS
306130	Bacon, James	583046834095		01/14/2020	04:15 PM	04:23 PM	00:08	00:08

Visits: 1; Total Bill Hours: 0.13; Total Pay Hours: 0.13

Employee ID: None
Employee Name: Lowri, Kelley
Santrax ID: 255
Dept: None

CLIENT								
ID	NAME	MEDICAID ID	SERVICE	VISIT DATE	START	END	BILL HOURS	PAY HOURS
762392	Bamridge, Amanda	371298372139		01/14/2020	04:00 PM	04:20 PM	00:20	00:20

Visits: 1; Total Bill Hours: 0.33; Total Pay Hours: 0.33

Employee ID: None
Employee Name: Osborne, Santiago
Santrax ID: 612258
Dept: None

CLIENT								
ID	NAME	MEDICAID ID	SERVICE	VISIT DATE	START	END	BILL HOURS	PAY HOURS
538777	Finnez, Ramona	317238248763		01/20/2020	12:37 PM	03:23 PM	02:46	02:46
960968	Mann, Sumner	482342340928		01/15/2020	04:09 PM	04:23 PM	00:14	00:14
960968	Mann, Sumner	482342340928		01/20/2020	12:39 PM	03:26 PM	02:47	02:47

Visits: 3; Total Bill Hours: 5.78; Total Pay Hours: 5.78

Employee ID: None
Employee Name: Osborne, Santiago
Santrax ID: 12258
Dept: None

Verified Hours for Payroll - Sample

Visit Capture Methodology Percentage Utilization

Description:

This report shows the percentage of calls captured by a method of visit verification used by an agency for a date range. The report displays the number of calls and what percentage of an agency's calls were captured using each method. The maximum date range for this report is 31 days.

Use:

This audit report can be used by individual providers to review the visit capture methodology used for each call placed across all employees. Payers can use this report to compare visit capture methodology use across a group of provider agencies.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)

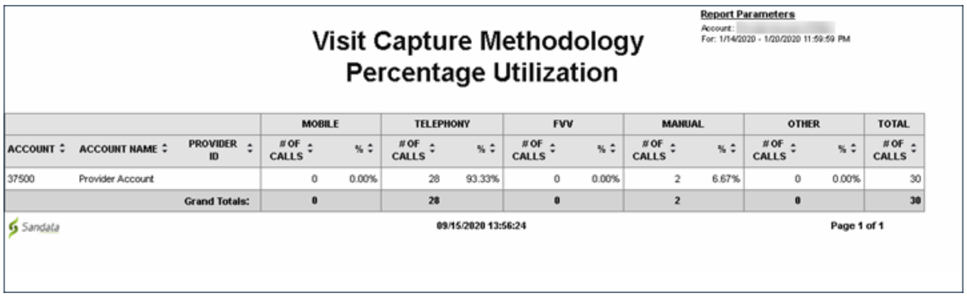
Report Output

Each column of the report displays:

Columns	Description
Account	the provider agency's Sandata EVV account number
Account Name	the account name
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Mobile # of Calls	the number of mobile calls captured using either SMC or a third-party system
Mobile %	the total percentage of calls captured using a mobile device
Telephony # of Calls	the number of telephony calls captured using either TVV or a third-party system
Telephony #	the total percentage of calls captured using telephony
FVV # of Calls	the number of fixed visit verification calls captured using a FVV device
FVV %	the total percentage of calls captured using a FVV device
Manual # of Calls	the number of calls manually entered in Sandata EVV or a third-party system

Columns	Description
Manual %	the total percentage of calls manually entered in Sandata EVV or a third-party system
Other # of Calls	the number of calls captured using a third-party system
Other %	the total percentage of calls captured using a third-party system
Total # of Calls	the total number of all calls captured
Grand Totals	the grand total of calls captured in each column

Sample Report



Report Parameters
Account:
For: 1/14/2020 - 1/20/2020 11:59:59 PM

Visit Capture Methodology
Percentage Utilization

			MOBILE		TELEPHONY		FVV		MANUAL		OTHER		TOTAL
ACCOUNT	ACCOUNT NAME	PROVIDER ID	# OF CALLS	%	# OF CALLS	%	# OF CALLS	%	# OF CALLS	%	# OF CALLS	%	# OF CALLS
37500	Provider Account		0	0.00%	28	93.33%	0	0.00%	2	6.67%	0	0.00%	30
		Grand Totals:	0		28		0		2		0		30

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Visit Capture Methodology Percentage Utilization - Sample

Visit Log Report

Description:

All visits associated with each Client within the selected date range are listed with one client per page in this report.

Use:

Use this report to track your client's visits by monitoring call times, pay, and reason codes.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	visits with the selected payer
Program	visits with the selected program
Service	the selected Service related to the visit
Client	Client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters
Client Medicaid ID	visits with the entered Medicaid ID
Supervisor	the selected supervisor
Department	visits that occurred in the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

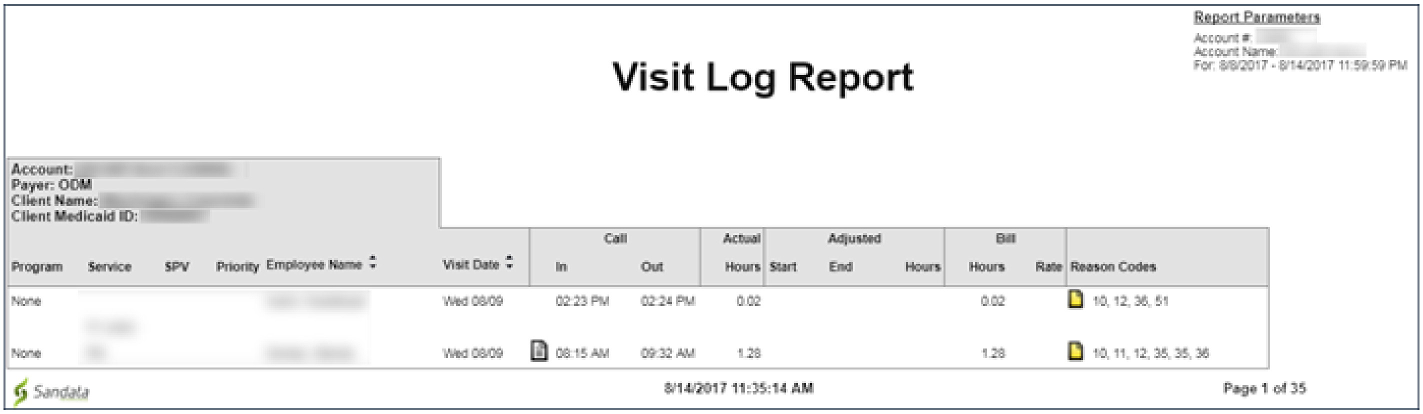
Report Output

Each column of the report displays:

Column	Description
Program	the program for the visit
Service	service(s) performed during the visit
SPV	the client's supervisor at the provider agency
Priority	the priority assigned to the visit
Employee Name	the name of the employee who conducted the visit
Visit date	the date of the visit
Call, In, Out	the call-in and call-out time for the visit
Actual Hours	the actual hours for the visit
Adjusted, Start, End, Hours	any manual edits made for the visit

Column	Description
Bill, Hours, Rate	the billable hours and rate for the visit
Reason Codes	any reason codes applied during the related visit

Sample Report



Report Parameters
Account #:
Account Name:
For: 8/8/2017 - 8/14/2017 11:59:59 PM

Visit Log Report

Account:
Payer: ODM
Client Name:
Client Medicaid ID:

						Call		Actual	Adjusted			Bill		
Program	Service	SPV	Priority	Employee Name	Visit Date	In	Out	Hours	Start	End	Hours	Hours	Rate	Reason Codes
None					Wed 08/09	02:23 PM	02:24 PM	0.02				0.02		10, 12, 36, 51
None					Wed 08/09	08:15 AM	09:32 AM	1.28				1.28		10, 11, 12, 35, 35, 36

Sandata 8/14/2017 11:35:14 AM Page 1 of 35

Visit Log Report

Visit Verification Activity

Description:

This report shows all visits taking place for a selected date range, sorted by client. The report displays visit information including client name, staff member, call in and call out time as well as additional visit information including scheduled visit times, billing information and any changes made to the visit. The maximum date range for this report is 7 days.

Use:

Use this report to review and verify visits that occurred for a selected date range. This is available as an excel file or CSV only due to the number of fields, it cannot be properly formatted for presentation and printing. This is a detailed report with all visit information.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Output – Excel and CSV Only

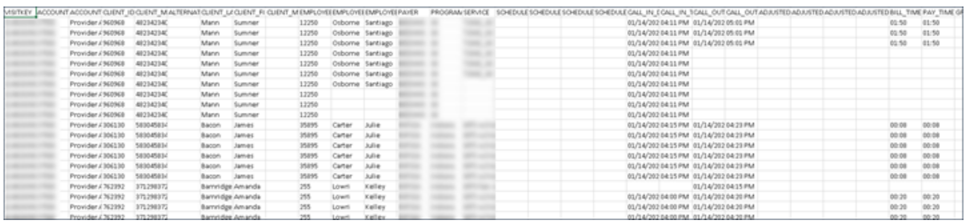
Each column of the report displays:

Column	Description
Visit Key	the visit key
Account	the provider agency's Sandata EVV account number
Account Name	the account name
Client ID	the Sandata client ID

Column	Description
Client Medicaid ID	the client’s Medicaid ID and/or alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Alternate Medicaid ID	the alternate Medicaid ID
Client Last Name	the client’s last name Blank if unknown.
Client First Name	the client’s first name Blank if unknown.
Client Middle Initial	the client’s middle initial Blank if unknown.
Employee Santrax ID	the employee's Santrax ID
Employee Last Name	the employee’s last name Blank if unknown.
Employee First Name	the employee’s first name Blank if unknown.
Payer	the payer for the visit
Program	the program for the visit
Service	the service performed for the visit
Scheduled In Date	the scheduled start date for the visit
Scheduled In Time	the scheduled start time for the visit
Scheduled Out Date	the scheduled end date for the visit
Scheduled Out Time	the scheduled end time for the visit
Call In Date	the call in date for the visit
Call In Time	the call in time for the visit
Call Out Date	the call out date for the visit
Call Out Time	the call out time for the visit
Adjusted In Date	the manually entered call in date for the visit
Adjusted In Time	the manually entered call in time for the visit
Adjusted Out Date	the manually entered call out date for the visit
Adjusted Out Time	the manually entered call out time for the visit
Bill Time	the billable time for the visit
Pay Time	the payable time for the visit
Group Code	the group visit code associated with the visit
Tasks	the task(s) performed for the visit

Column	Description
Memo	any information entered in the Memo field of the Visit Details screen
Change User	the user who edited the visit
Change Date	the date the visit was edited
Change Time	the time the visit was edited
Change Privilege	the change made based on the privilege (e.g. Visit - Update Client, Visit - Update Memo, Acknowledge exception: Client Signature Exception)
Reason Code	any reason codes applied when editing the visit

Sample Report



Visit Verification Activity - Sample

Visit Verification Activity Summary Report

Description:

This report contains a list of modifications for each visit, if any. Only the modified visits are included in this report and lists the user who performed the Visit Maintenance.

Use:

Use this report to review Visit Verification.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Client	client by name (last name, first name) or Sandata Client ID when a partial name is entered the report displays results that begin with the entered characters
Client Medicaid ID	the entered Client Medicaid ID
Department	visits from the selected department
Employee	visits from the entered employee.
Payer	visits with the selected payer(s)
Service	visits the selected service(s)
Supervisor	the selected supervisor

Report Output

Each column of the report lists:

Columns	Description
Client Medicaid ID	the client's Medicaid ID
Client Name	the client's name
Employee Name	the employee who conducted the visit
Employee Santrax ID	The employee's Santrax ID
Employee Other ID	the employee's Other ID
HCPCS	the HCPCS code used for billing
Group Visit Code	the group visit code associated with the visit, if applicable
Visit Date	the date the visit occurred
Actual, Start, End, Hours	the start-time, end-time, and the amount of hours elapsed for the related visit
Adjusted, Start, End, Hours	any manual edits to the start-time, end-time, and adjusts the hours elapsed to reflect these edits for related visits

Sample Report

Columns	Description
Bill Hours	the total billable hours for the related visit
Units	the total billable units for the related visit, if applicable
Reason Code	any reason codes that have been applied visit
Omit	N=No. Y=Yes indicating whether or not any omissions have been made for this visit
Offline Visit	if any visit's call s were placed while the device used was in offline mode

Sample Report

Visit Verification Activity Summary

Report Parameters
Account:
For: 6/5/2023 - 12/11/2023 11:59:59 PM

Account: ( )
Payer: None
Program: None

Client Medicaid ID	Client Name	Employee Name	Employee Santrax ID	Employee Other ID	HCPCS	Group Visit Code	Visit Date	Actual Start	Actual End	Actual Hours	Adjusted Start	Adjusted End	Adjusted Hours	Bill Hours	Bill Units	Reason Code	Omit	Offline Visit
Visit - Add Visit - TA .COM - 9/28/2023 10:12 AM																		
00	A	B	75		COMBO		09/12/2023	10:00 AM	11:00 AM	01:00				01:00		01	N	N/A
Visit - Add Visit - TA .COM - 9/28/2023 10:17 AM																		
00	A	B	75		COMBO		09/04/2023	01:00 PM	02:00 PM	01:00				01:00		01	N	N/A
Manual Call - Add to Specified Visit - SANTRAX - 10/13/2023 09:57 AM																		
22	BAMMERTON, BAMMY	G	95	95	99600		10/13/2023	09:15 AM	09:55 AM	00:40				00:40		03	N	N/A
Visit - Update Employee - GE .COM - 10/19/2023 09:30 AM																		
22	B B	C	74		99600		10/19/2023	09:07 AM	09:21 AM	00:14				00:14		04	N	N/A
Visit - Add Visit - SH .COM - 11/15/2023 02:06 PM																		
23	A N	C	74		99600		11/13/2023	08:01 AM	01:05 PM	05:04				05:04		04	N	N/A

Visit Verification Activity Summary Report

Report Parameters

Account: MOM HOME HEALTH AND PC - CROP (91031)
For: 6/5/2023 - 12/11/2023 11:59:59 PM

Visit Verification Activity Summary

Legend

Icon	Text	Description
		GPS
		The value has been changed
		Memo
		FVV Call
		Manual Call
		IVR Call
		Other Call

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Report Parameters

Account: MOM HOME HEALTH AND PC - CROP (91031)
For: 6/5/2023 - 12/11/2023 11:59:59 PM

Visit Verification Activity Summary

REASON CODE	DESCRIPTION
01	Caregiver Error
02	Member Unavailable
03	Mobile Device Issue
04	Telephony Issue
05	Member Refused Verification
06	Service Outside the Home
08	Other

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Visit Verification Activity Summary Report – Legends

Visit Verification Exception

Description:

This report details the various exceptions found in Visit Verification and lists each exception type page by page. Example: GPS Distance Exception

Use:

Use this report to review the visit verification information and activity for a date range.

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	visits with the selected payer(s).
Exception	visits with the selected exception(s).
Program	visits with the selected program.
Service	visits with the selected service(s) applied.
Client	only those visits with the entered client (format: last name, first name). When a partial value is entered the report will display results that begin with the entered value.
Client Medicaid ID	the selected Client Medicaid ID.
Supervisor	the selected supervisor.
Department	visits from the selected department.
Employee	only those visits with the entered employee (format: last name, first name). When a partial value is entered the report will display results that begin with the entered value.

Report Output

Each column of the report displays:

Column	Description
SPV	The supervisor at the provider agency
Medicaid ID	the client's Medicaid ID.
Client	the client's name.
Employee	the employee who carried out the visit.
Exceptions	the exception the report is filtered for
Date	the date the visit occurred.
Actual, Start, End, Hours	the start-time, end-time, and time elapsed in hours for the related visit.

Column	Description
Adjusted, Start, End, Hours	any manual edits to the start-time, end-time, or hours elapsed for the related visit.
Bill Hours	the billable hours for the related visit.
Reason Codes	any reason codes applied to the related visit.
Tasks	the tasks performed for the visit

Sample Report

Report Parameters
Account:
For: 8/9/2017 - 8/14/2017 11:59:59 PM

Visit Verification Exception Report

Account:
Payer:
Program: None
Service: None
Exception Type: GPS Distance Exception

						ACTUAL			ADJUSTED			BILLED	REASON	
SPV	MEDICAID ID	CLIENT	EMPLOYEE	EXCEPTIONS	DATE	START	END	HOURS	START	END	HOURS	HOURS	CODES	TASKS
	123555555123	[illegible]	[illegible]		[illegible]	11:26 AM	11:30 AM	0.07				0.07		X
	748748748748	[illegible]	[illegible]		[illegible]	10:09 AM	10:18 AM	0.15				0.15		
	333669999	[illegible]	[illegible]		[illegible]	11:34 AM	11:38 AM	0.07				0.07		X
	123888888123	[illegible]	[illegible]		[illegible]	10:33 AM	10:35 AM	0.03				0.03		X
	121212121212	[illegible]	[illegible]		[illegible]	11:32 AM	11:35 AM	0.05				0.05		X
	201708111234	[illegible]	[illegible]		[illegible]	02:24 PM	02:41 PM	0.28				0.28		X
	102030405060	[illegible]	[illegible]		[illegible]	07:37 PM	10:21 AM	14.73				14.73		X
	112244556677	[illegible]	[illegible]		[illegible]	09:10 AM	09:11 AM	0.02				0.02		X
	123888888123	[illegible]	[illegible]		[illegible]	09:09 AM	09:12 AM	0.05				0.05		X
	1112223456	[illegible]	[illegible]		[illegible]	05:26 AM	05:27 AM	0.02				0.02		X
	201708111234	[illegible]	[illegible]		[illegible]	12:35 PM	12:43 PM	0.13				0.13		X

Total of Actual Hours: 15.60
Total of Adjusted Hours: N/A
Total of Billed Hours: 15.60
Total of Visits: 11

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Visit Verification Exception Report

Weekly Call Summary

Description:

This report displays a summary view of all calls placed for the selected week in a weekly grid format, sorted by employee. The report includes information about each call, the client, the employee, and general information about each call. The report includes scheduled and actual times for each call as well as the call duration. If adjusted call times exist for the visit, they are displayed on this report. If no adjusted times exist, the actual call time is displayed.

Use:

Use this report to view worker's schedules and actual call information for each week. This report can be compared to a worker's schedule to assist in determining schedule compliance.

Fields and Columns:

Parameters

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	Client by name (last name, first name) or Sandata client ID When a partial name is entered the report displays results that begin with the entered characters.
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client's Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Employee	Employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters.

Report Grouping Tab

Reports are grouped by the following fields. Each change in these fields results in a page break

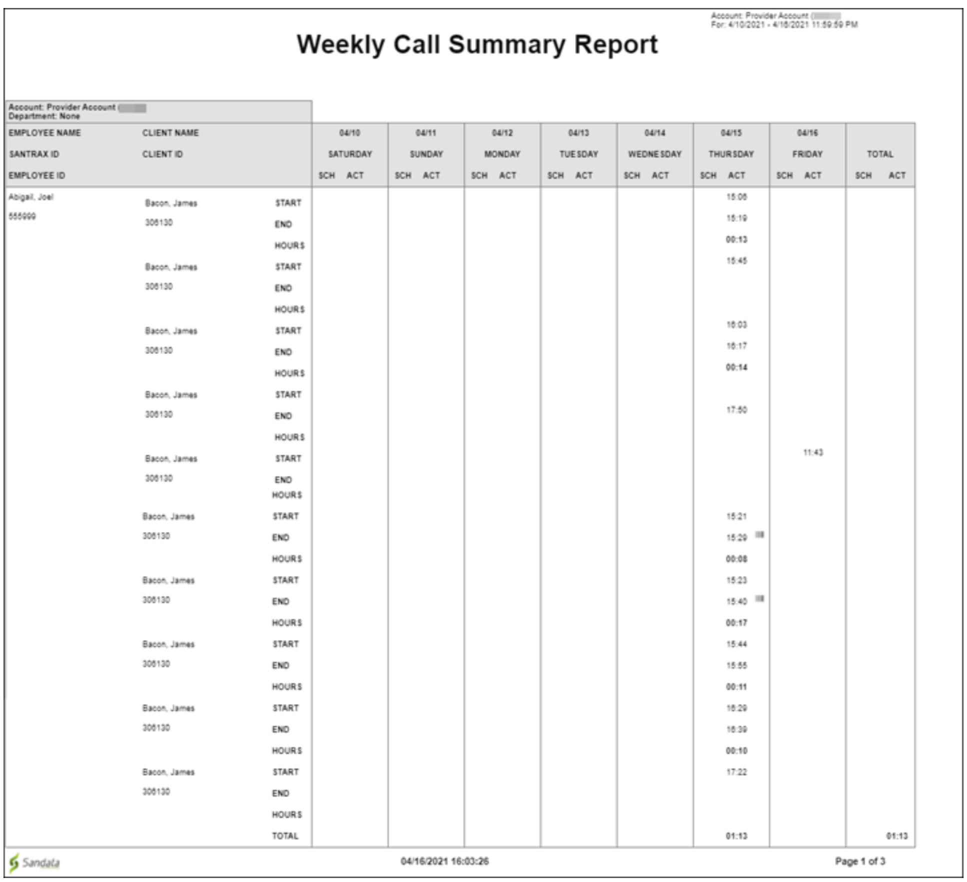
Field	Description
Account	the provider agency
Department	the department

Report Output

Each column of the report displays:

Column	Description
Employee Name	the employee's name Blank if unknown.
Santrax ID	the employees Santrax ID
Employee ID	the employee ID
Client Name	the client's name. Blank if unknown.
Client ID	the client's ID number
SCH	the scheduled call time
ACT	the actual call time If an adjusted call time exists, the adjusted value is displayed in this column.
Date/Day of Week	the date and day of the week the call occurred
Total	the total duration of all calls across the selected date range

Sample Report



Account: Provider Account (
For: 4/10/2021 - 4/16/2021 11:59:59 PM

Weekly Call Summary Report

Account: Provider Account (
Department: None

EMPLOYEE NAME	CLIENT NAME		04/10		04/11		04/12		04/13		04/14		04/15		04/16			
SANTRAX ID	CLIENT ID		SATURDAY		SUNDAY		MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY		TOTAL	
EMPLOYEE ID			SCH	ACT	SCH	ACT	SCH	ACT	SCH	ACT	SCH	ACT	SCH	ACT	SCH	ACT	SCH	ACT
Abigail, Joel	Bacon, James	START												15:06				
555999	306130	END												15:19				
		HOURS												00:13				
	Bacon, James	START												15:45				
	306130	END																
		HOURS																
	Bacon, James	START												16:03				
	306130	END												16:17				
		HOURS												00:14				
	Bacon, James	START																
	306130	END												17:50				
		HOURS																
	Bacon, James	START														11:43		
	306130	END																
		HOURS																
	Bacon, James	START												15:21				
	306130	END												15:29				
		HOURS												00:08				
	Bacon, James	START												15:23				
	306130	END												15:40				
		HOURS												00:17				
	Bacon, James	START												15:44				
	306130	END												15:55				
		HOURS												00:11				
	Bacon, James	START												16:29				
	306130	END												16:39				
		HOURS												00:10				
	Bacon, James	START												17:22				
	306130	END																
		HOURS																
		TOTAL												01:13				01:13

Sandata 04/16/2021 16:03:26 Page 1 of 3

Weekly Call Summary – Sample

FVV Assignment

Description:

This report provides a complete view of FVV device assignment, un-assignment, and utilization.

Use:

Use this audit report to view FVV device assignments as well as the overall utilization. This report helps users identify those devices that me be assigned and unused or not used for significant periods of time and determine if outreach is necessary to determine if the device should be returned or reassigned.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client AR#	the client's AR#
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client’s Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency’s Sandata EVV account number
Provider ID	the Provider's Medicaid ID number

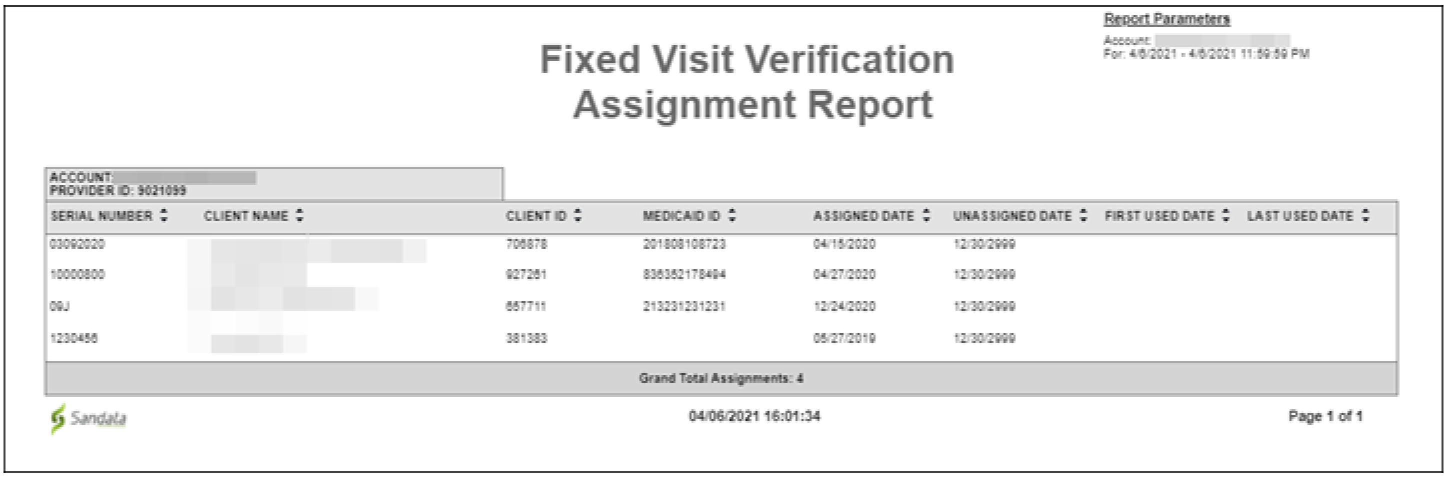
Report Output

Each column of the report lists:

Columns	Description
Serial Number	the serial number of the FVV Device
Client Name	the client's name
Client ID	the client's ID number

Columns	Description
Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
Assigned Date	the date the FVV device was assigned
Unassigned Date	the date the FVV device was unassigned
First Used Date	the date the FVV device was first used
Last Used Date	the date most recent date the FVV device was used

Sample Report



Report Parameters
Account:
For: 4/6/2021 - 4/6/2021 11:59:59 PM

Fixed Visit Verification Assignment Report

ACCOUNT:
PROVIDER ID: 9021099

SERIAL NUMBER	CLIENT NAME	CLIENT ID	MEDICAID ID	ASSIGNED DATE	UNASSIGNED DATE	FIRST USED DATE	LAST USED DATE
03092020		706878	201808108723	04/15/2020	12/30/2999		
10000800		927261	836352178494	04/27/2020	12/30/2999		
09J		657711	213231231231	12/24/2020	12/30/2999		
1230456		381383		05/27/2019	12/30/2999		

Grand Total Assignments: 4

Sandata 04/06/2021 16:01:34 Page 1 of 1

FVV Assignment - Sample

FVV Call Listing

Description:

This report displays a list of all FVV calls that occurred within the selected 7-day date range based on the date and time the FVV call was registered in the system. The report includes information about each FVV call including the FVV value, whether the entry was a call in or a call out, and information about the client and employee for each call.

Use:

Use this report to quickly review FVV activity for the account.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client AR#	the client's AR#
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays the results that begin with the entered characters

Report Output

Each column of the report lists:

Columns	Description
Client ID	the Sandata client ID
Client Name	the client's name Blank if unknown
Client Medicaid ID	the client's ID number
Santrax ID	the employee's Santrax ID
Employee Name	the employee's name
IN/OUT	indicates if the call entered was assigned as the call in or the call out

Columns	Description
Entry Date	the date the FVV value from the FVV device was entered into the system
Entry Time	the time the FVV value from the FVV Device was entered into the system
FVV Value	the reading from the FVV device

Sample Report

Report Parameters
Account: Provider Account (
For: 4/15/2021 - 4/15/2021 11:59:59 PM

FVV Call Listing Report

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	SANTRAX ID	EMPLOYEE NAME	IN/OUT	ENTRY DATE	ENTRY TIME	FVV VALUE
306130	Bacon, James	583045834095	555999	Abigail, Joel				-
306130	Bacon, James	583045834095	555999	Abigail, Joel				-
Total # Occurrences that FVV Values were Entered into Santrax: 2								

Sandata 04/15/2021 18:13:49 Page 1 of 1

FVV Call Listing Report - Sample

Invalid FVV Entries

Description:

This report shows all invalid FVV entries for the selected date range. The report includes general information visits for which an invalid FVV entry was made. Invalid FVV entries are caused when a user selections FVV when making the TVV call, but the FVV value was not translated into a valid call time for the client. This report also includes information about the cause of the invalid entry. The maximum date range for this report is 730 days.

Use:

Use this report to review invalid FVV entries and identify patterns and trends in making FVV entries. These may help identify employees requiring additional training or device registration issues.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)
Client	client by name (last name, first name) or Sandata Client ID When a partial name is entered the report displays results that begin with the entered characters.
Client AR#	the client's AR#
Client Medicaid ID	clients with the entered Medicaid ID The entered value must be an exact match to a client’s Medicaid ID.
Supervisor	the supervisor code for the client(s) at the provider agency
Department	the selected department
Employee	employee by name (last name, first name) or Santrax ID When a partial name is entered the report displays results that begin with the entered characters

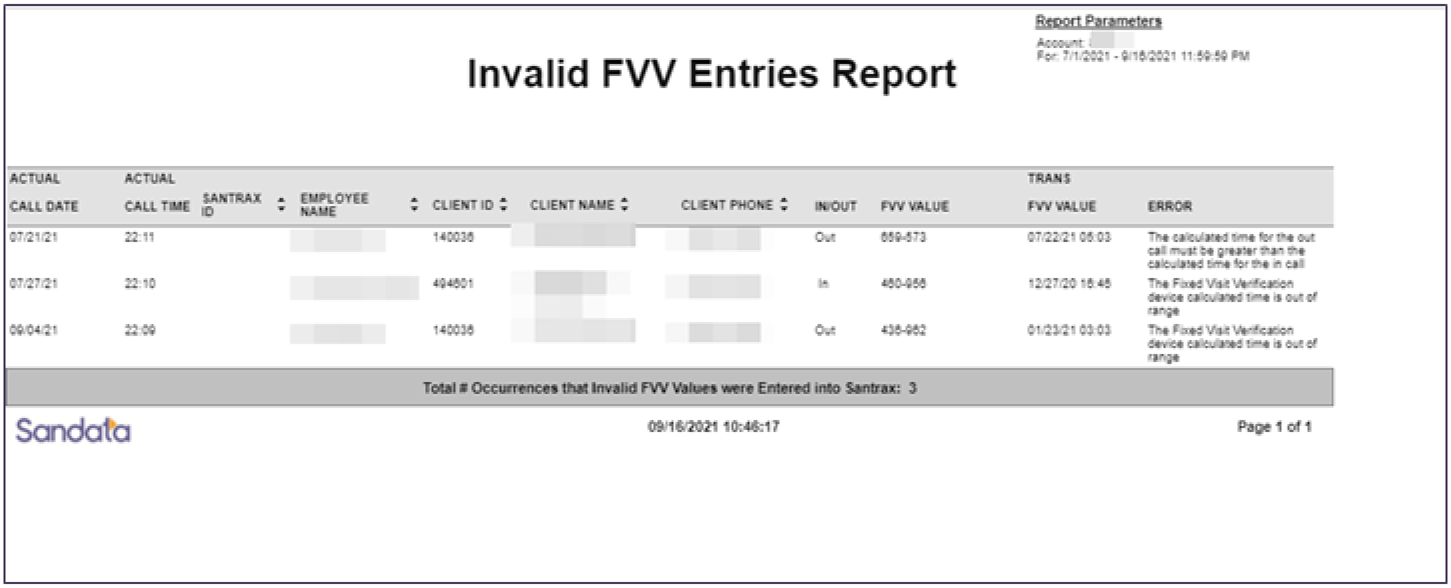
Report Output

Each column of the report lists:

Columns	Description
Actual Call Date	the actual date the call was received
Actual Call Time	the actual time the call was received
Santrax ID	the employee's Santrax ID

Columns	Description
Client ID	the client's Sandata ID
Client Name	the client's name
Client Phone	the client's primary phone number
IN/OUT	indicates whether the FVV call that triggered an error was identified as a call in or a call out
FVV Value	the value entered from the FVV device
Error	indicates what caused the invalid FVV entry

Sample Report



Report Parameters
Account:
For: 7/1/2021 - 9/16/2021 11:59:59 PM

Invalid FVV Entries Report

ACTUAL CALL DATE	ACTUAL CALL TIME	SANTRAX ID	EMPLOYEE NAME	CLIENT ID	CLIENT NAME	CLIENT PHONE	IN/OUT	FVV VALUE	TRANS FVV VALUE	ERROR
07/21/21	22:11			140036			Out	659-573	07/22/21 05:03	The calculated time for the out call must be greater than the calculated time for the in call
07/27/21	22:10			494601			In	460-956	12/27/20 16:45	The Fixed Visit Verification device calculated time is out of range
09/04/21	22:09			140036			Out	436-962	01/23/21 03:03	The Fixed Visit Verification device calculated time is out of range

Total # Occurrences that Invalid FVV Values were Entered into Santrax: 3

09/16/2021 10:46:17 Page 1 of 1

FVV Assignment - Sample

Active Users

Description:

This report shows a list of all active users for the selected date range. The report displays when the user was created in the system, the date each user's password expires, the last time the user logged in and assigned supervisors. The maximum date range for this report is 730 days.

Use:

Use this report to review the roster of active users and their last log in times. System administrators can also use this report to review possible security changes or to view upcoming password expirations.

Fields and Columns:

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

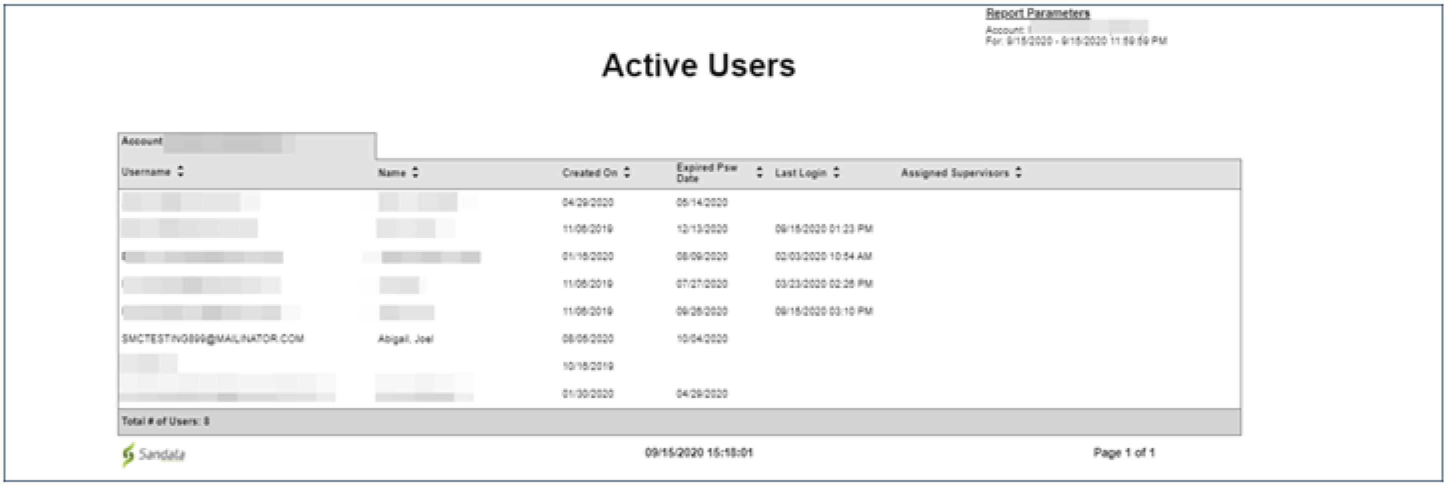
Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report lists:

Columns	Description
Username	the email address used to log into the system
Name	the user's name
Created On	the date the user was created
Expired Psw Date	the date the user's password expired or expires
Last Login	the user's last Sandata account login date and time
Assigned Supervisors	the supervisor names or codes associated with the user if the user is a supervisor

Sample Report



Report Parameters
Account:
For: 9/15/2020 - 9/15/2020 11:59:59 PM

Active Users

Account

Username	Name	Created On	Expired Psw Date	Last Login	Assigned Supervisors
[illegible]	[illegible]	04/29/2020	05/14/2020		
[illegible]	[illegible]	11/06/2019	12/13/2020	09/15/2020 01:23 PM	
[illegible]	[illegible]	01/15/2020	08/09/2020	02/03/2020 10:54 AM	
[illegible]	[illegible]	11/06/2019	07/27/2020	03/23/2020 02:26 PM	
[illegible]	[illegible]	11/06/2019	09/26/2020	09/15/2020 03:10 PM	
SMCTESTING899@MAILINATOR.COM	Abigail, Joel	08/05/2020	10/04/2020		
[illegible]		10/15/2019			
[illegible]	[illegible]	01/30/2020	04/29/2020		
Total # of Users: 8					

Sandata 09/15/2020 15:18:01 Page 1 of 1

Active Users - Sample

Report Request Detail

Description:

This report shows all report requests made on a specific date. The report provides the username of the requester, the report ran, times and report length. The maximum range of this report is 1 day.

Use:

Use this report to view what reports have been run in the system.

Fields and Columns:

Parameter

Use the following fields to limit the report output to:

Field	Description
Payer	the selected payer(s)
Program	the selected program(s)
Service	the selected service(s)

Report Information

This report shows the various selection criteria used when each report was run. Fields with information are limited based on the report selected, its criteria, and the selections made by the user. The report output is the selection information used when running each report.

Columns	Description
Report Type	the grouping or type of report On the Reports Page, this is the Report Type drop-down
Report Name	the reports selected On the Reports Page, this is the Report Name
Rows Returned	the number of rows returned for the report based on the selected criteria If no rows were returned, the report was blank
Report Run Start	the date and time the report began
Report Run End	the date and time the report finished
User Name	the username of the individual requesting the report
Account	the provider agency's Sandata EVV account number used for the report if applicable Users may see multiple accounts for the Aggregator version of this report or an 'A' which indicates 'All'
Group	internal accounts grouping

Report Information

Columns	Description
Jurisdiction	the group name used for generating the report which defines report row level security within Aggregator Used for Aggregator reports only
Payer	the payer selected for the report if applicable
Program	the program selected for the report if applicable
Service	the service selected for the report if applicable
Supervisor	the supervisor selected for the report if applicable
Client Name	the client name selected for the report if applicable
Client Medicaid ID	the client's Medicaid ID and/or Alternate Medicaid ID If not available, Payer ID. If newborn support is enabled and the client is flagged as a newborn, is shown as "N".
AR Number	the client Accounts Receivable (AR) number selected for the report if applicable
Department	the employee's department selected for the report if applicable
Employee Name	the employee name selected for the report if applicable
Employee Santrax ID	the employee Santrax ID selected for the report if applicable
Employee Team	the employee's team selected for the report if applicable
Task	the task(s) selected for the report if applicable
Visit Status	the Visit Status selected for the report if applicable

Sample Report

Report Requests Detail

Report Parameters
Account: [illegible]
For: 1/14/2020 - 1/14/2020 11:59:59 PM

SORT BY	REPORT TYPE	REPORT RUN START	REPORT START RANGE
	REPORT NAME	REPORT RUN END	REPORT END RANGE
	ROWS RETURNED	USER NAME	USER

ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	CLIENT NAME	CLIENT ID	CLIENT MEDICAID ID	AR NUMBER	DEPARTMENT	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	EMPLOYEE TEAM	TASK	VISIT STATUS

REPORT TYPE:	Date Range Reports	REPORT RUN START:	1/14/2020 5:02:23 PM	REPORT START RANGE:	12/31/2019 12:00:00 AM
REPORT NAME:	Auto Verification Report Detail	REPORT RUN END:	1/14/2020 5:02:35 PM	REPORT END RANGE:	1/14/2020 11:59:59 PM
ROWS RETURNED:	12	USER NAME:	[illegible]	USER:	[illegible]

							CLIENT					EMPLOYEE				
ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	NAME	ID	MEDICAID ID	AR NUMBER	DEPARTMENT	NAME	SANTRAX ID	TEAM	TASK	VISIT STATUS
[illegible]			All	All	All											All

REPORT TYPE:	Authorizations	REPORT RUN START:	1/14/2020 4:14:43 PM	REPORT START RANGE:	1/14/2020 12:00:00 AM
REPORT NAME:	Expiring Authorizations	REPORT RUN END:	1/14/2020 4:14:46 PM	REPORT END RANGE:	1/14/2020 11:59:59 PM
ROWS RETURNED:	0	USER NAME:	[illegible]	USER:	[illegible]

							CLIENT					EMPLOYEE				
ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	NAME	ID	MEDICAID ID	AR NUMBER	DEPARTMENT	NAME	SANTRAX ID	TEAM	TASK	VISIT STATUS
[illegible]		[illegible]		All	All											All

REPORT TYPE:	Authorizations	REPORT RUN START:	1/14/2020 4:06:34 PM	REPORT START RANGE:	1/14/2020 12:00:00 AM
REPORT NAME:	Expiring Authorizations	REPORT RUN END:	1/14/2020 4:06:36 PM	REPORT END RANGE:	1/14/2020 11:59:59 PM
ROWS RETURNED:	0	USER NAME:	[illegible]	USER:	[illegible]

							CLIENT					EMPLOYEE				
ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	NAME	ID	MEDICAID ID	AR NUMBER	DEPARTMENT	NAME	SANTRAX ID	TEAM	TASK	VISIT STATUS

Report Requests Detail - Sample

Role Listing

Description:

This report displays a list of the account's roles and all the privileges assigned to those roles. The creation and deletion dates for each role is included in the report.

Use:

Use this report to audit the roles for the account to ensure the appropriate privileges are assigned to the correct roles.

Fields and Columns:

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report lists:

Columns	Description
Role	the name of the role
Role Description	a short description of the role
Created	the date the role was created
Deleted	the date the role was deleted
Privilege Description	a short description of the privilege

Sample Report

Report Parameters
Account:
For: 4/8/2021 - 4/8/2021 11:59:59 PM

Role Listing

Account : Provider Account

ROLE	ROLE DESCRIPTION	CREATED	DELETED	PRIVILEGE DESCRIPTION
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Client Voice Recording - Access Module
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Client Voice Recording - Record Message via Phone
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Dashboard - Access Module
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		GPS Map - Access Module
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports - Run Active Clients
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports - Run Reports
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Access Module
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Active Employees
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Summary Visit Status
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Visit Listing
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Visit Log
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Visit Verification
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Reports: Visits Claims Verification Status
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM		Visit Maintenance - View Module
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Access Module
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Add/Delete/Update Additional Client Addresses
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Add/Delete/Update Additional Client Phones
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Add/Update Client
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Add/Update Client Payor Information
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Delete Client
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Update Client Name
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Update Client Status
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - Update Medicaid ID
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Maintenance - View Client Payor Information
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Management - View Client
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Voice Recording - Access Module
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Client Voice Recording - Record Message via Phone
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Dashboard - Access Module
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Employee Maintenance - Access Module
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Employee Maintenance - Add/Update Employee
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM		Employee Maintenance - Delete Employee

Sandata 04/08/2021 16:57:53 Page 1 of 6

Active Users - Sample

Role Membership

Description:

This report displays a list of all roles configured for the account and which users are assigned to those roles as of the date the report was run.

Use:

This report is used to audit role assignments to individual users. The report allows users to easily view the current role assignments and determine if changes are needed.

Fields and Columns:

Report Grouping

Reports are grouped by the following fields. Each change in these fields results in a page break.

Field	Description
Account	the provider agency's Sandata EVV account number

Report Output

Each column of the report lists:

Columns	Description
Role	the name of the role
Role Description	a short description of the role
Created	the date the role was deleted
Deleted	the date the role was deleted
User Full Name	the full name of the user assigned the role
User Name	the username/email address of the user assigned the role

Sample Report

Report Parameters
Account: Provider Account
For: 4/15/2021 - 4/15/2021 11:59:59 PM

Role Membership

Account Provider Account

ROLE	ROLE DESCRIPTION	CREATED	DELETED	USER FULL NAME	USER NAME
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM			
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM			
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM			
ASST_COOR	Supports the coordinator	10/16/2019 10:17 AM			
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM			
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM			
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM			
COORDINATOR	Administrative generalist supporting various Santrax activities	10/16/2019 10:17 AM			
PVV_ADMIN_ROLE	Members can start Setup_FOB module	4/9/2021 11:07 AM			
PVV_ADMIN_ROLE	Members can start Setup_FOB module	4/9/2021 11:07 AM			
POC_ACCESS	Members can start Setup_POC_dataentry module	1/23/2020 5:27 PM			
POC_ACCESS	Members can start Setup_POC_dataentry module	1/23/2020 5:27 PM			
SECURITY_ADMIN	Members can start SetupSecurity_broadcastmsg_acc module	4/9/2021 11:04 AM			
SV_EMP_ADMIN_ROLE	Members can start Employ Speaker Verification module	1/23/2020 10:48 AM			
SV_EMP_ADMIN_ROLE	Members can start Employ Speaker Verification module	1/23/2020 10:48 AM			
SV_EMP_ADMIN_ROLE	Members can start Employ Speaker Verification module	1/23/2020 10:48 AM			
Security_Admin	Role 1	10/16/2019 10:17 AM			
Security_Admin	Role 1	10/16/2019 10:17 AM			
Security_Admin	Role 1	10/16/2019 10:17 AM			
Security_Admin	Role 1	10/16/2019 10:17 AM			

Sandata 04/15/2021 15:45:24 Page 1 of 1

Role Membership - Sample

System Activity

Description:

This report shows all activity taking place in the system for a selected date range. The report displays a list of users, modules accessed, log in and log out times and the actions made within the system. The maximum date range for this report is 7 days.

Use:

This is an audit report using the system logs to understand user activity within the system. All accounts are shown together on this report. Both the overall user login information is available as well as the time spent in each individual module. This can be used to view individual user activity or activity for date range within the system.

Fields and Columns:

Report Output

Each column of the report lists:

Columns	Description
Account: Provider ID	the state assigned identifier for the provider (e.g. Provider Medicaid ID)
Account: Number	the provider agency's Sandata EVV account number
Account: Name	the account name
Log Date: In	the date and time the user logged in
Log Date: Out	the date and time the user logged out This value is blank if the user did not use the LOG OUT button to log out of the system.
User: ID	the email address used to log into the system
User: Name	the user's name (last, first)
Request: Start	the date and time the module was accessed
Request: End	the date and time the module access was completed (e.g. the user logged out or went to another module)
Module	the name of the module accessed
Privilege	the privilege allowing access to the module
Description	the activity performed by the user

Sample Report

Report Parameters
[illegible]
For: 1/14/2020 - 1/20/2020 11:59:59 PM

System Activity

ACCOUNT			LOG DATE		USER		REQUEST				
PROVIDER ID	NO	NAME	IN	OUT	ID	NAME	START	END	MODULE	PRIVILEGE	DESCRIPTION
	[illegible]	[illegible]	1/20/2020 10:20 PM		[illegible]	[illegible]	1/20/2020 10:23 PM	1/20/2020 10:23 PM	REPORTS	Reports - Access Module	RunReport
	[illegible]	[illegible]	1/20/2020 10:20 PM		[illegible]	[illegible]	1/20/2020 10:21 PM	1/20/2020 10:21 PM	REPORTS	Reports - Access Module	RunPreview
	[illegible]	[illegible]	1/20/2020 10:20 PM		[illegible]	[illegible]	1/20/2020 10:20 PM	1/20/2020 10:20 PM	REPORTS	Reports - Access Module	RunReport
	[illegible]	[illegible]	1/20/2020 10:20 PM		[illegible]	[illegible]	1/20/2020 10:20 PM	1/20/2020 10:20 PM	VM	Visit Maintenance - View Module	VisitMaintenance
	[illegible]	[illegible]	1/20/2020 8:23 PM		[illegible]	[illegible]	1/20/2020 8:23 PM	1/20/2020 8:23 PM	DATA ENTRY	Client Maintenance - Access Module	Get clients list
	[illegible]	[illegible]	1/20/2020 8:23 PM		[illegible]	[illegible]	1/20/2020 8:23 PM	1/20/2020 8:23 PM	DATA ENTRY	Client Maintenance - Access Module	Search Clients
	[illegible]	[illegible]	1/20/2020 8:23 PM		[illegible]	[illegible]	1/20/2020 8:23 PM	1/20/2020 8:23 PM	VM	Visit Maintenance - View Module	VisitMaintenance
	[illegible]	[illegible]	1/20/2020 8:23 PM		[illegible]	[illegible]	1/20/2020 5:00 AM	1/21/2020 4:59 AM	VM	Visit Maintenance - View Module	Get visits
	[illegible]	[illegible]	1/20/2020 7:35 PM		[illegible]	[illegible]	1/20/2020 8:59 PM	1/20/2020 8:59 PM	REPORTS	Reports - Access Module	RunPreview
	[illegible]	[illegible]	1/20/2020 7:35 PM		[illegible]	[illegible]	1/20/2020 8:59 PM	1/20/2020 8:59 PM	REPORTS	Reports - Access Module	RunReport
	[illegible]	[illegible]	1/20/2020 7:35 PM		[illegible]	[illegible]	1/20/2020 8:59 PM	1/20/2020 8:59 PM	VM	Visit Maintenance - View Module	VisitMaintenance
	[illegible]	[illegible]	1/20/2020 7:35 PM		[illegible]	[illegible]	1/20/2020 8:59 PM	1/20/2020 8:59 PM	DATA ENTRY	Authorizations Maintenance - Access Module	getAuthorizations
	[illegible]	[illegible]	1/20/2020 7:35 PM		[illegible]	[illegible]	1/20/2020 8:59 PM	1/20/2020 8:59 PM	DATA ENTRY	Authorizations Maintenance - Access Module	Authorizations

System Activity - Sample

User Login History

Description:

This report shows a list of all users who logged into the system for a selected date range. The report displays the username, time, browser and the IP addresses of the users. The maximum date range for this report is 7 days.

Use:

Use this report to allow authorized users to view all user login activity. This report can assist with audits and be useful to identify trends or patterns within or across providers.

Fields and Columns:

Report Output

Each column of the report lists:

Columns	Description
Provider ID	the state assigned identifier for the provider (e.g Provider Medicaid ID)
Account	the provider's Sandata EVV account number
Account Name	the provider's account name
User ID	the email address used to login to the system
Log In	the date and time the user logged in
Log Out	the date and time the user logged out. This value is blank if the user did not use the LOG OUT button to log out of the system.
IP Used	the IP address the user logged in and out from
Browser Details	the second row displays additional browser information

Sample Report

Report Parameters
Account: [illegible]
For: 1/14/2020 - 1/20/2020 11:59:59 PM

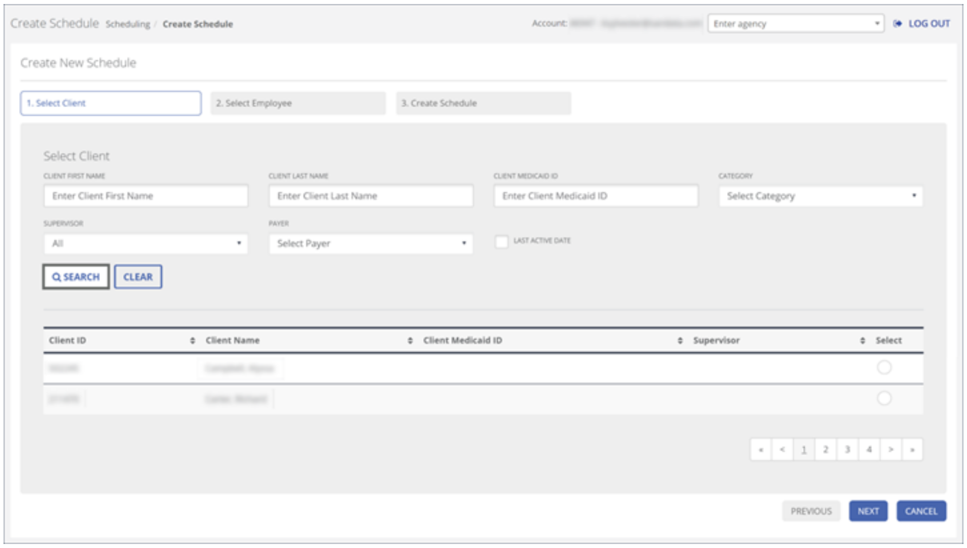
User Login History

PROVIDER ID	ACCOUNT	ACCOUNT NAME	USER ID	USER NAME	LOG IN	LOG OUT	IP USED
	[illegible]	Provider Account	[illegible]	[illegible]	01/20/2020 05:20 PM		[illegible]
Mozilla/5.0 (Window: [illegible] 64; x64) AppleWebKit/537.36 (KHTML, like Ge [illegible]							
	[illegible]	Provider Account	[illegible]	[illegible]	01/20/2020 03:23 PM		[illegible]
Mozilla/5.0 (Window: [illegible] 64; x64) AppleWebKit/537.36 (KHTML, like Ge [illegible]							
	[illegible]	Provider Account	[illegible]	[illegible]	01/20/2020 02:35 PM		[illegible]
Mozilla/5.0 (Window: [illegible] 64; x64) AppleWebKit/537.36 (KHTML, like Ge [illegible]							
	[illegible]	Provider Account	[illegible]	[illegible]	01/20/2020 12:29 PM		[illegible]
Mozilla/5.0 (Window: [illegible] 64; x64) AppleWebKit/537.36 (KHTML, like Ge [illegible]							
	[illegible]	Provider Account	[illegible]	[illegible]	01/20/2020 12:27 PM		[illegible]
Mozilla/5.0 (Window: [illegible] 64; x64) AppleWebKit/537.36 (KHTML, like Ge [illegible]							
	[illegible]	Provider Account	[illegible]		01/20/2020 12:27 PM	01/20/2020 12:27 PM	[illegible]
Mozilla/5.0 (Window: [illegible] 64; x64) AppleWebKit/537.36 (KHTML, like Ge [illegible]							
	[illegible]	Provider Account	[illegible]	[illegible]	01/20/2020 12:25 PM	01/20/2020 12:26 PM	[illegible]

User Login History - Sample

Scheduling

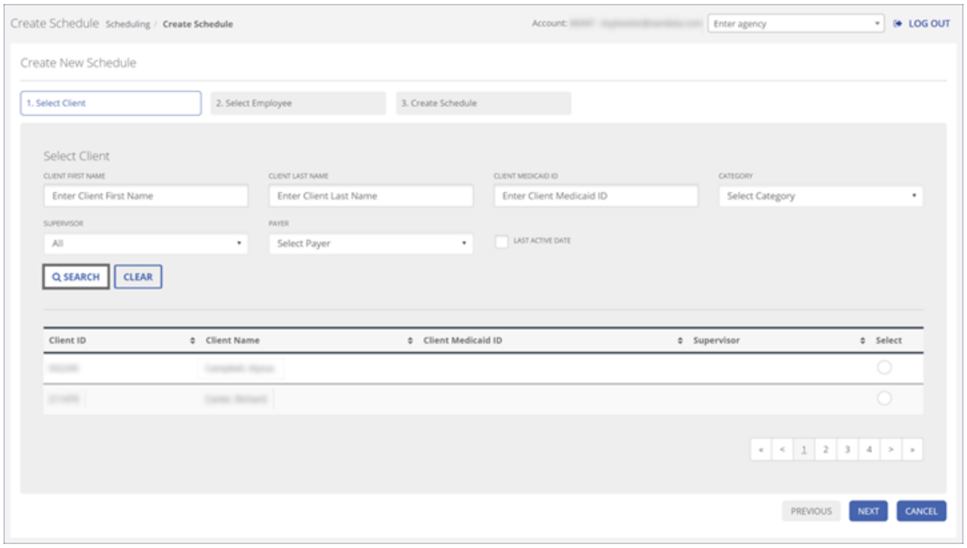
The Scheduling tab of Sandata EVV allows the viewing and creation of schedules by client and employee. Scheduling for Consumer Directed programs is generally optional. This is the basic version of Sandata scheduling, intended for a consumer directed user. Agencies will have enhanced scheduling available.



Note:
When scheduling, clients or designees can only view and select themselves and/or the clients they are associated with.

Fields and Buttons on the Select Client Tab

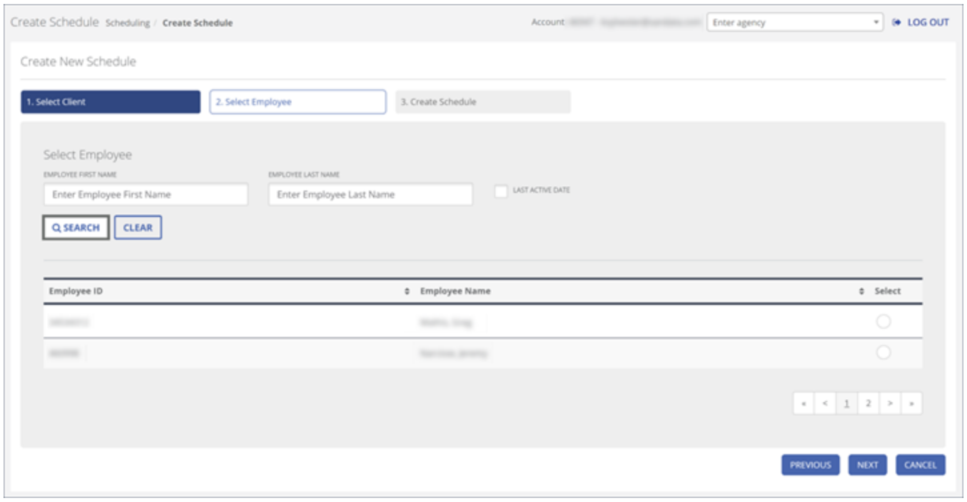
Here is a description of the fields found on the Select Client tab.



Field	Description
CLIENT FIRST NAME	Enter the client’s first name. When a partial name is entered, results display that begin with the entered characters.
CLIENT LAST NAME	Enter the client’s last name. When a partial name is entered, results display that begin with the entered characters.
CLIENT MEDICAID ID	Use this field to search for a single client based on the client’s Medicaid ID.
CATEGORY	Select the category.
SUPERVISOR	Select the supervisor.
PAYER	Select the payer.
LAST ACTIVE DATE	Adds the Last Active Date column to search results.

Fields and Buttons on the Select Employee Tab

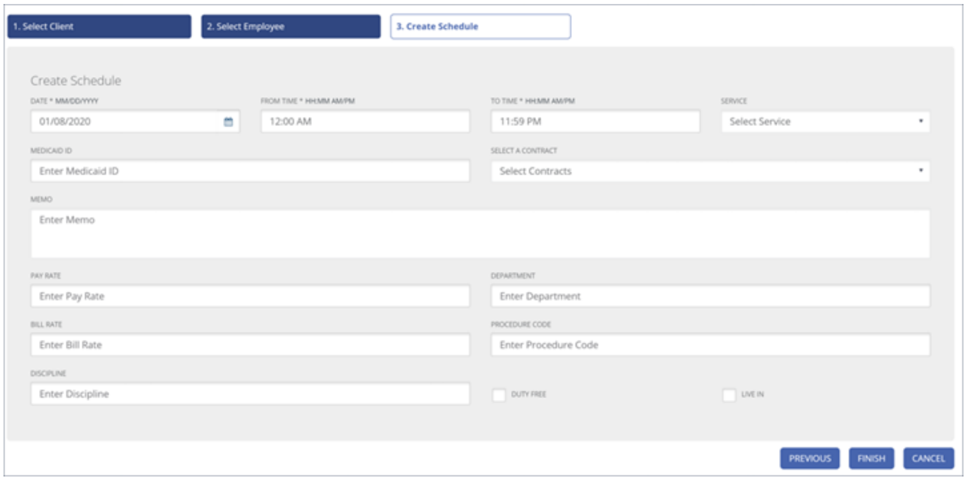
Here is a description of the fields found on the Select Employee tab.



Field	Description
EMPLOYEE FIRST NAME	Enter the employee's first name. When a partial name is entered, results display that begin with the entered characters.
EMPLOYEE LAST NAME	Enter the employee's last name. When a partial name is entered, results display that begin with the entered characters.
LAST ACTIVE DATE	Adds the Last Active Date column to search results.

Fields and Buttons on the Create Schedule Tab

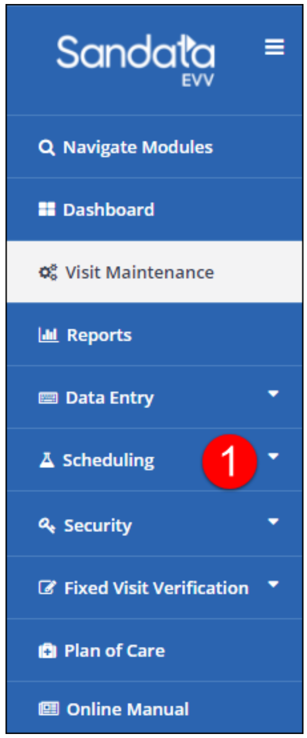
Here is a description of the fields found on the Create Schedule tab.



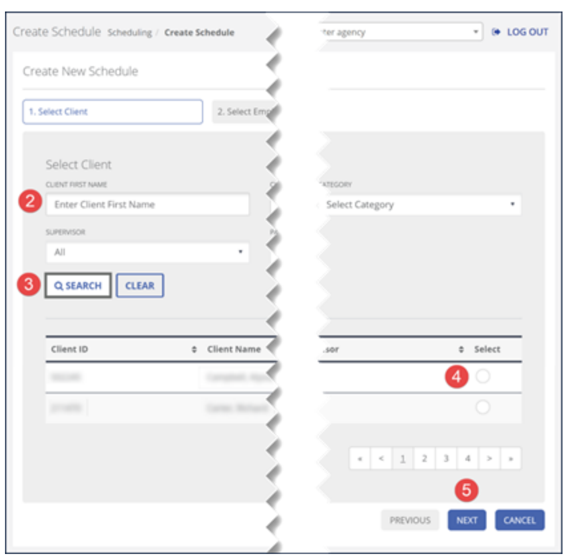
Field	Description
DATE * MM/DD/YYYY	Enter or select the date the visit is scheduled to start.
FROM TIME * HH:MM AM/PM	Enter the time the visit is scheduled to begin.
TO TIME * HH:MM AM/PM	Enter the time the visit is scheduled to end.
SERVICE	Select the service.
MEDICAID ID	If the client being entered does not have a Medicaid ID or a uses a different Medicaid ID for this visit only, enter it in this field.
SELECT A CONTRACT	Select the contract.
MEMO	Enter any additional notes for the visit.
PAY RATE	Enter the pay rate for the visit.
DEPARTMENT	Enter the department.
BILL RATE	Enter the bill rate for the visit.
PROCEDURE CODE	Enter the procedure code.
DISCIPLINE	Enter the discipline.
DUTY FREE	Select this box to indicate the visit includes a paid break. For programs not configured to use this functionally, selecting this checkbox without enabling the required functionality has no effect.
LIVE IN	Select this box to indicate a live in visit.

Scheduling a Visit

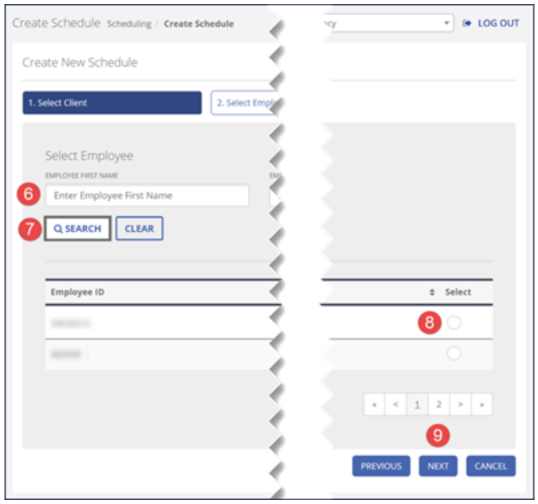
1. Navigate to the Create Schedule screen.



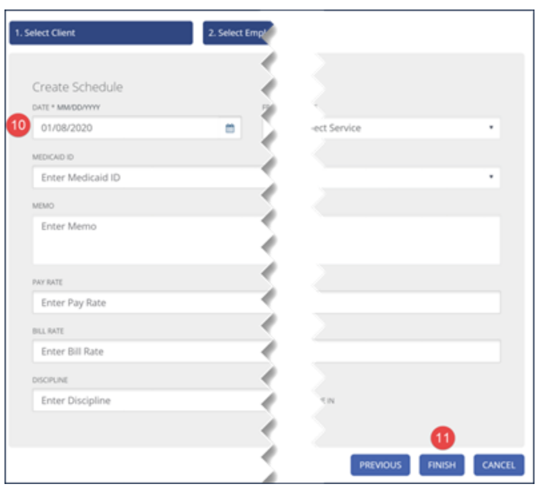
2. Enter/select the appropriate fields on the Select Client tab.
3. Click **Search**.
4. Select the client.
5. Click **Next**.



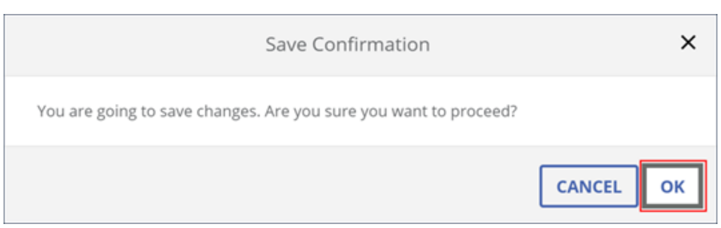
6. Enter /select the appropriate fields on the Select Employee tab.
7. Click **Search**.
8. Select the employee.
9. Click **Next**.

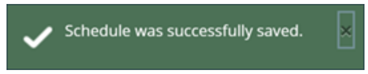


10. Enter/select the appropriate fields on the Create Schedule tab.
11. Click **Finish**.



12. Click **OK.**



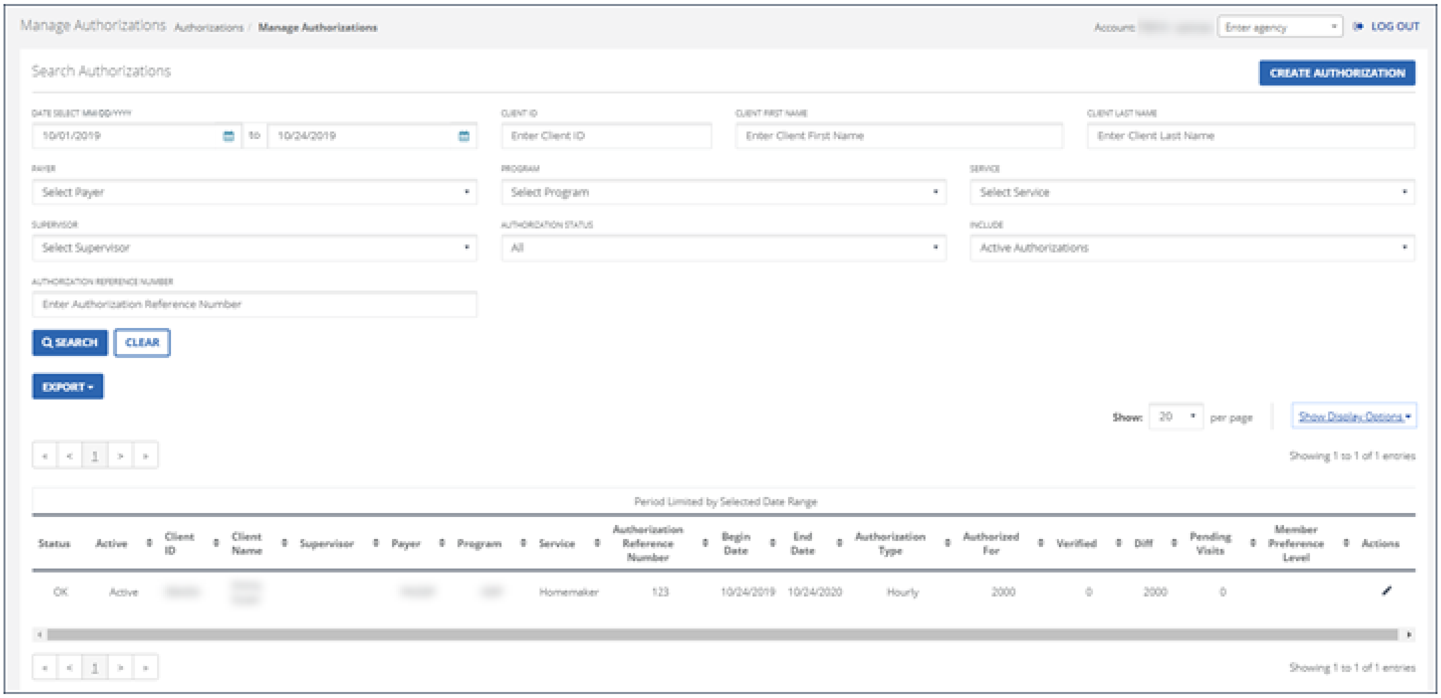

Schedule was successfully saved.

Authorizations

The Authorizations section allows users to search for and view read only versions of all authorizations that meet the selected search criteria.

Authorizations, often referred to as Prior Authorizations (PAs) inform the employee of the services they are allowed to perform for the client. They also specify the maximum amount of the specified service that the provider can bill for.

Manage Authorizations



Manage Authorizations Screen

<u>Fields</u>

Field	Description
DATE SELECT (MM/DD/YYYY)	Use these fields to limit results to authorizations with a begin/end date within the entered date range
CLIENT ID	Use this field to search for authorizations based on the client's Santrax ID number.
CLIENT FIRST NAME	Use this field to search for authorizations based on the client's first name.
CLIENT LAST NAME	Use this field to search for authorizations based on the client's last name.

Field	Description
PAYER	Use this field to search for authorizations based on the originating payer.
PROGRAM	Use this field to search for authorizations based on the assigned program.
SERVICE	Use this field to search for authorizations based on the assigned service.
SUPERVISOR	Use this field to search for authorizations based on the assigned Supervisor.
AUTHORIZATION STATUS	Use this field to search for authorizations based on its current status.
INCLUDE	By default, this field is set to display All authorizations. Use this field to limit results to active, expired or future authorizations.
AUTHORIZATION REFERENCE NUMBER	Use this field to search for a single authorization based on the authorization's exact Ref No (reference number) which is provided by the payer.
EXPORT 	Click this button to view all current results shown in an Excel or CSV format. This functionality allows the export of all authorization data, which can be used in place of many authorization reports.

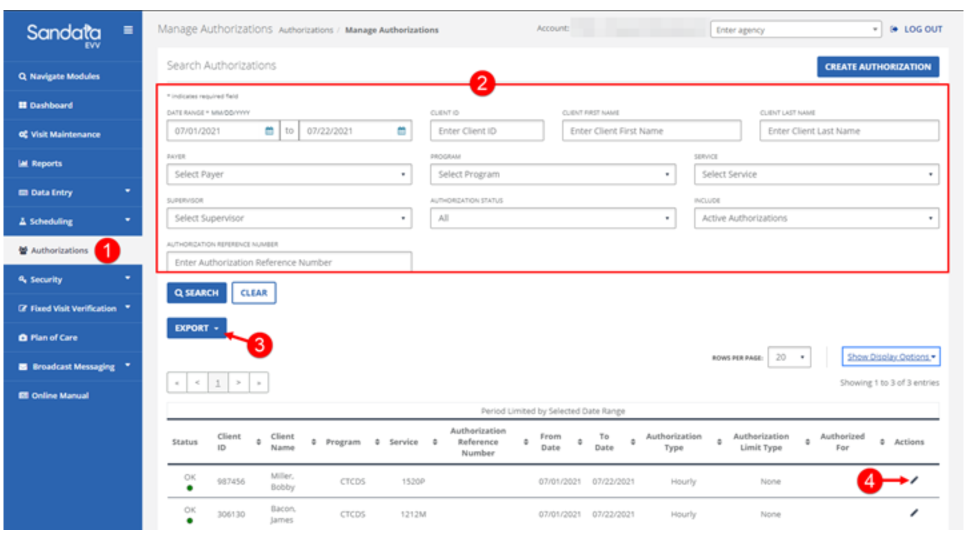
Columns

Field	Description
Status	Indicates the authorization is currently active.
Active	Indicates the authorization is currently active (within the begin and end date range).
Client ID	Displays the client's Santrax ID.
Client Name	Displays the client's name.
Supervisor	Displays the number of visits which may apply to the authorization that are not in a verified status.
Payer	Displays the authorization's payer.
Program	Displays the authorization's program.
Service	Displays the authorization's service.
Authorization Reference Number	Displays the number used to identify the authorization.
Begin Date	Displays the authorization's start date.
End Date	Displays the authorization's expiration date.

Field	Description
Authorization Type	Displays the authorization's billing format (Example: Hourly, Unit, Visit)
Authorized For	Displays the authorization's MAX UNITS ALLOCATED.
Verified	Displays the number of units or hours used against the authorization in a verified or processed state.
Diff	Displays the unused units or hours (authorized for – verified).
Pending Visits	Displays the number of visits which may apply to the authorization that are not in a verified status.

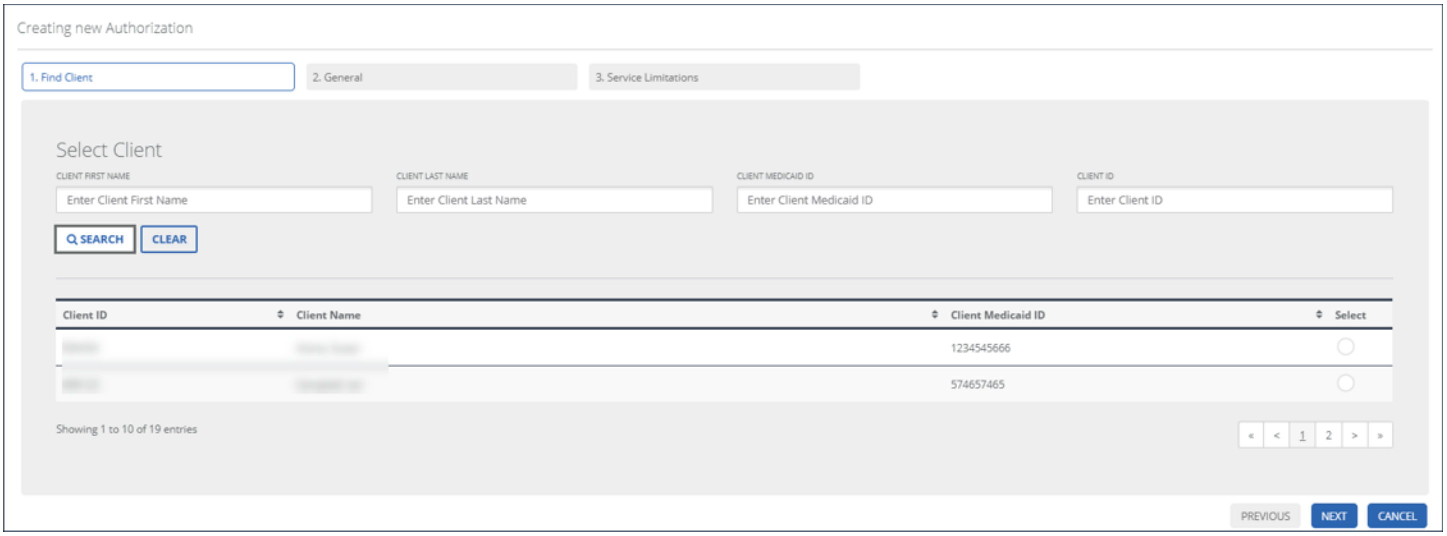
Searching for Authorizations

1. Navigate to the Manage Authorizations screen. (**Authorizations**)
2. Enter the search criteria.
3. Click **SEARCH.**
4. Click the Edit icon ( ) to view the Edit Authorizations screen.



Manage Authorizations Screen

Create Authorization Screen: Find Client Tab

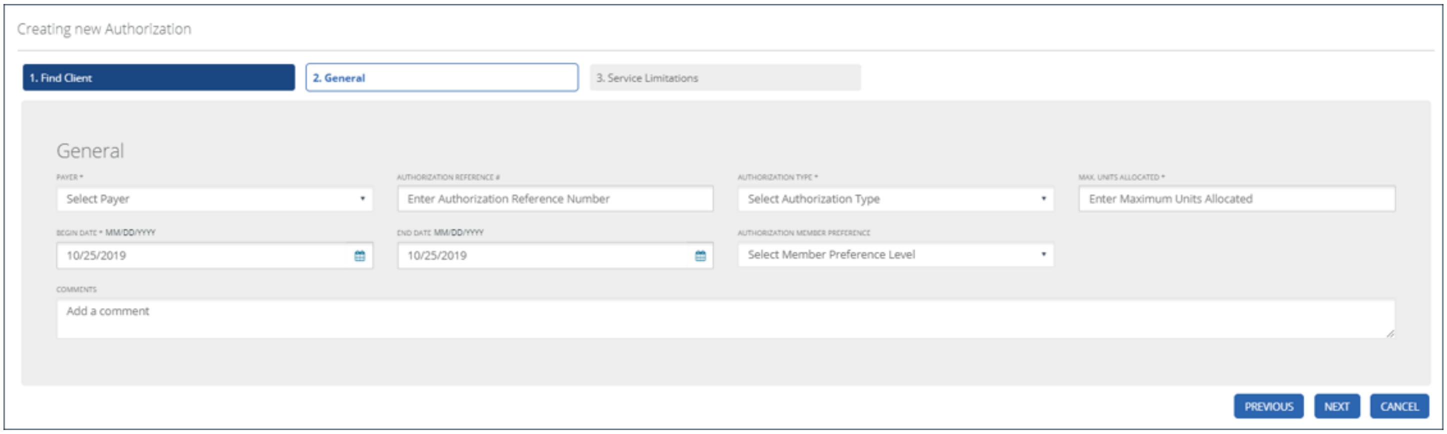


Find Client Tab

Fields

Field	Description
CLIENT ID	Enter the client's Santrax ID number.
CLIENT MEDICAID ID	Enter the client's Medicaid ID number.
CLIENT LAST NAME	Enter the client's last name.
CLIENT FIRST NAME	Enter the client's first name.

Create Authorization Screen: General Tab



General Tab

Fields

Field	Description
COMMENTS	Use this field to record additional authorization notes.
PAYER	Select the payer.
AUTHORIZATION TYPE	Select the authorization's billing format (Example: Hourly, Unit, Visit).
MAX UNITS ALLOCATED	Enter the maximum allowable value for the authorization. This relates to the type selected; if the type is Units, the Maximum is in units. If the type is in Hours, the Maximum is in hours. Enter "0" to indicate that maximum value has no limit.
BEGIN DATE (MM/DD/YYYY)	Enter the authorization's start date.
AUTHORIZATION REFERENCE NUMBER	Enter the authorization's ID number.
END DATE (MM/DD/YYYY)	Enter the authorization's expiration date.
AUTHORIZATION MEMBER PREFERENCE	Displays the number used to identify the authorization.

Messaging

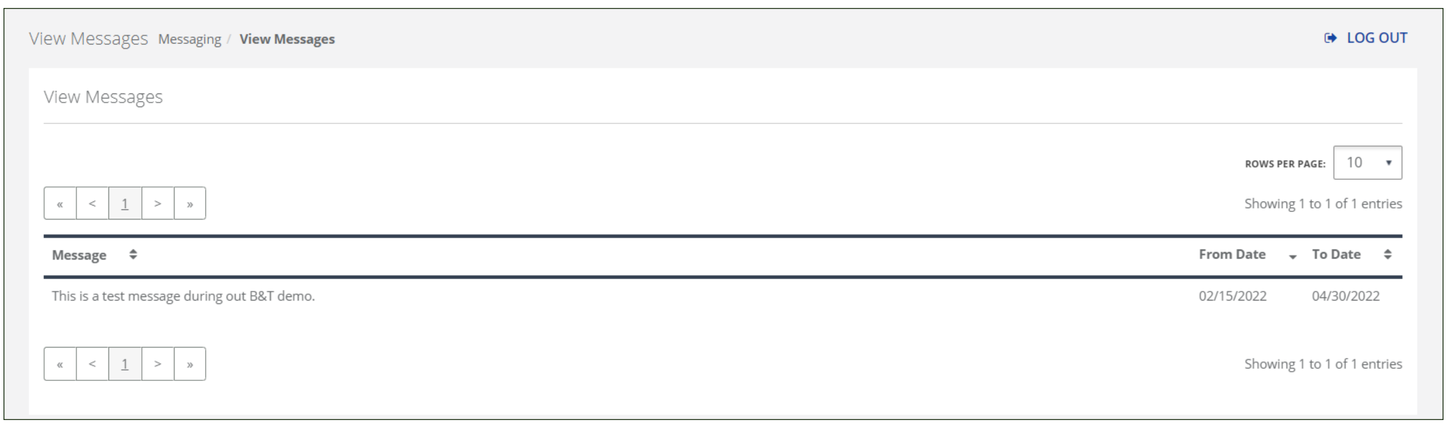
The Messaging section is only shown when the messaging feature is enabled in both the Aggregator and Provider accounts. Messages are created by the payer in Aggregator and are viewed in EVV. Users with the correct permissions can use the Messaging section to post messages to all agency accounts or a subset of the assigned accounts All of the account's users may view the message as long as they have the correct privilege.

The Messaging section displays messages sent to the EVV account. Messages are read only. Users cannot use the system to respond to messages. Only users with the appropriate privileges may view this section.

View Messages

The View Messages screen is used to view messages. Each message is displayed with the message's text, start date and end date. Clicking the column's header, when the arrows are present, will sort the results in ascending/descending order based on that column's content.

Fields and Buttons on the View Messages Screen



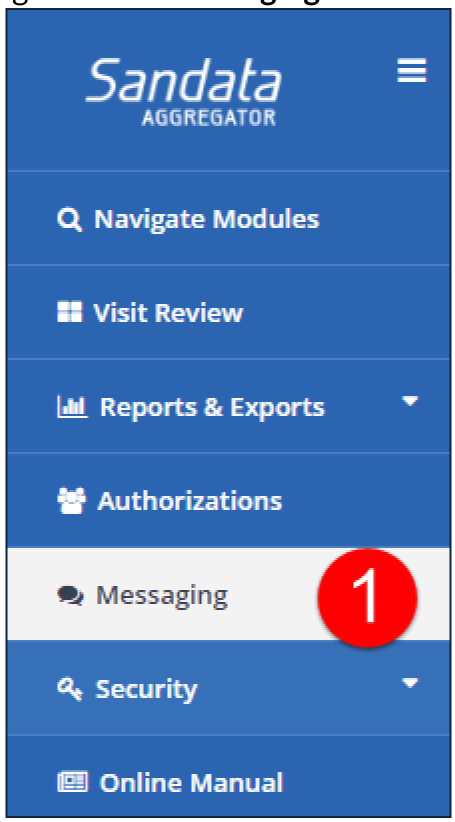
View Messages Screen

Field	Description
MESSAGE	The display of the message(s).
START DATE	The date the message starts displaying.
END DATE	The date the message stops displaying.

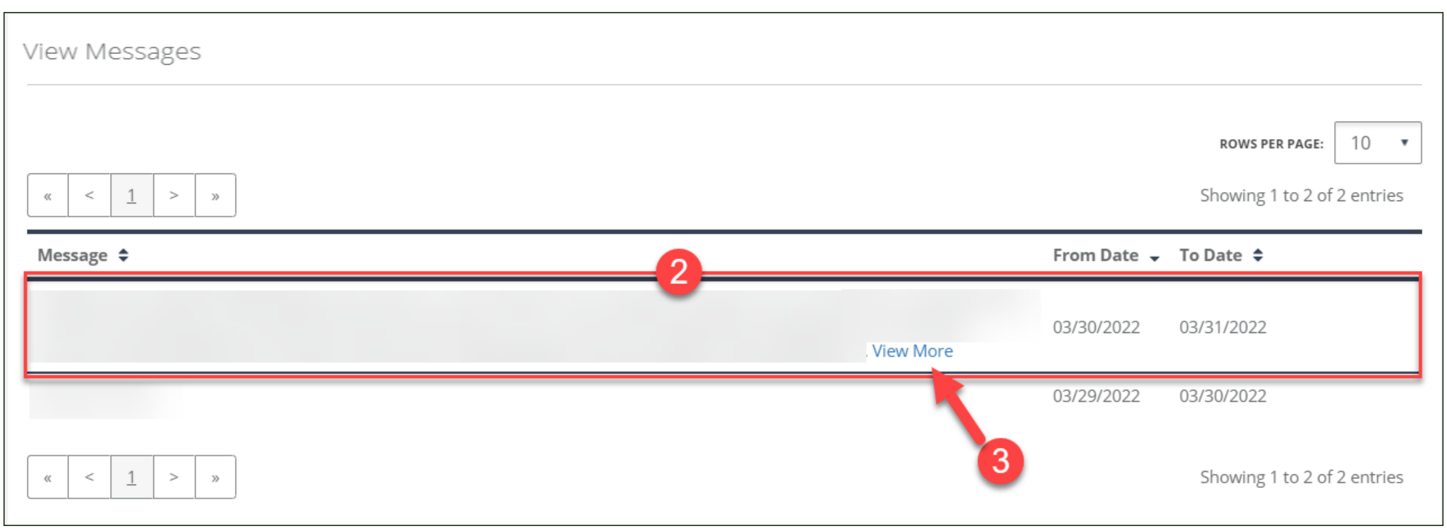
Viewing a Message

The Messaging section displays messages sent to the EVV account. Messages are read only. Users cannot use the system to respond to messages.

1. Navigate to a the View Messages screen **Messaging**.



2. Click the message.



View Messages"Viewing a Message" on the previous page

3. Click the **View More** link to display a pop up screen with the full message, if applicable.
4. Click **CLOSE**.

Security

The Security section allows users with the correct privileges to create and update new and existing users. Using a combination of assignable privileges and customizable roles, access to the system and specific functionality can be defined and controlled. Security settings allow users with appropriate system permissions to:

- Change your own password.
- Create and update users and user roles.
- Reset user passwords.
- Lock/Unlock users, which restricts or restores that users access to the system.
- Create user roles and assign security privileges to those roles. Assigning multiple roles grants users the privileges assigned to each role.
- Assign one or more roles to specific users.
- Assign individual security privileges to users.

Universal User Passwords

User IDs are based on email addresses and a single email address has the same password across Sandata EVV. Changing the password for an email address changes it across all accounts.

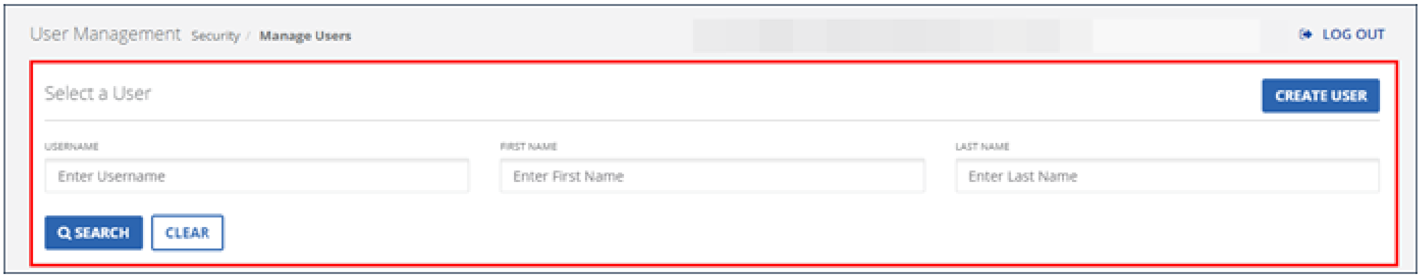
Available Assignments

Access to the system is based on assignments made in this section. Available assignments change based on system configuration. Users can be assigned:

1. User Roles, which are a set of privileges. It is best practice to create and assign a role instead of assigning individual privileges, as privileges may change.
2. Privileges, which grant access to individual screens and functions.
3. Clients, which can be assigned to consumer directed users.
4. Employees, which can be assigned to consumer director users.
5. Supervisors, who are typically the person assigned to supervise that user.

Manage Users

The Manage Users tab allows users with the appropriate security permissions to create and update users. ‘Users’ are staff members authorized to use the Sandata EVV system. Use this section of the application to search for, create and deactivate users.



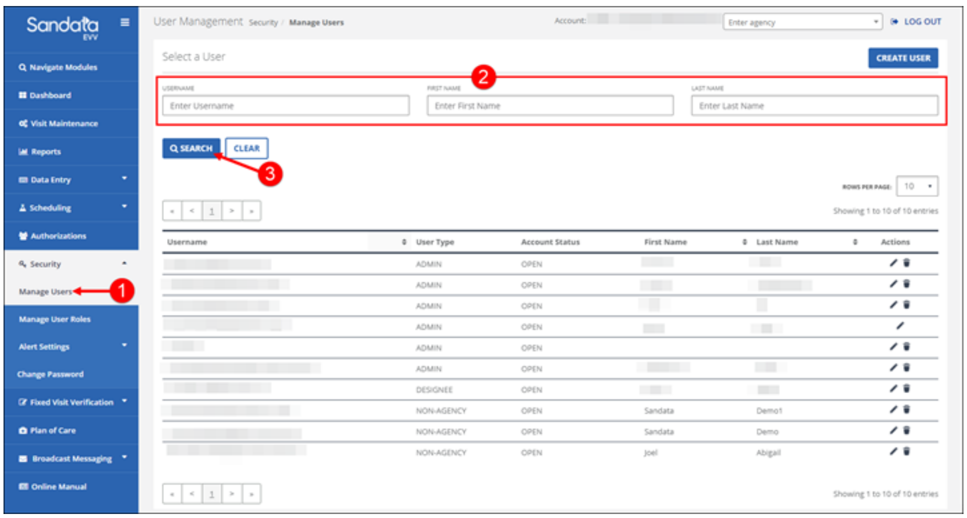
Select a User Screen

Field	Description
CREATE USER	Use this button to create a new user.
FIRST NAME	Use this field to search based on a user's first name.
LAST NAME	Use this field to search based on a user's last name.
USERNAME	Use this field to search based on a user's email address, which is also the user-name.

Searching for Users

Use the Select a User section of the Manage Users screen to search for existing users.

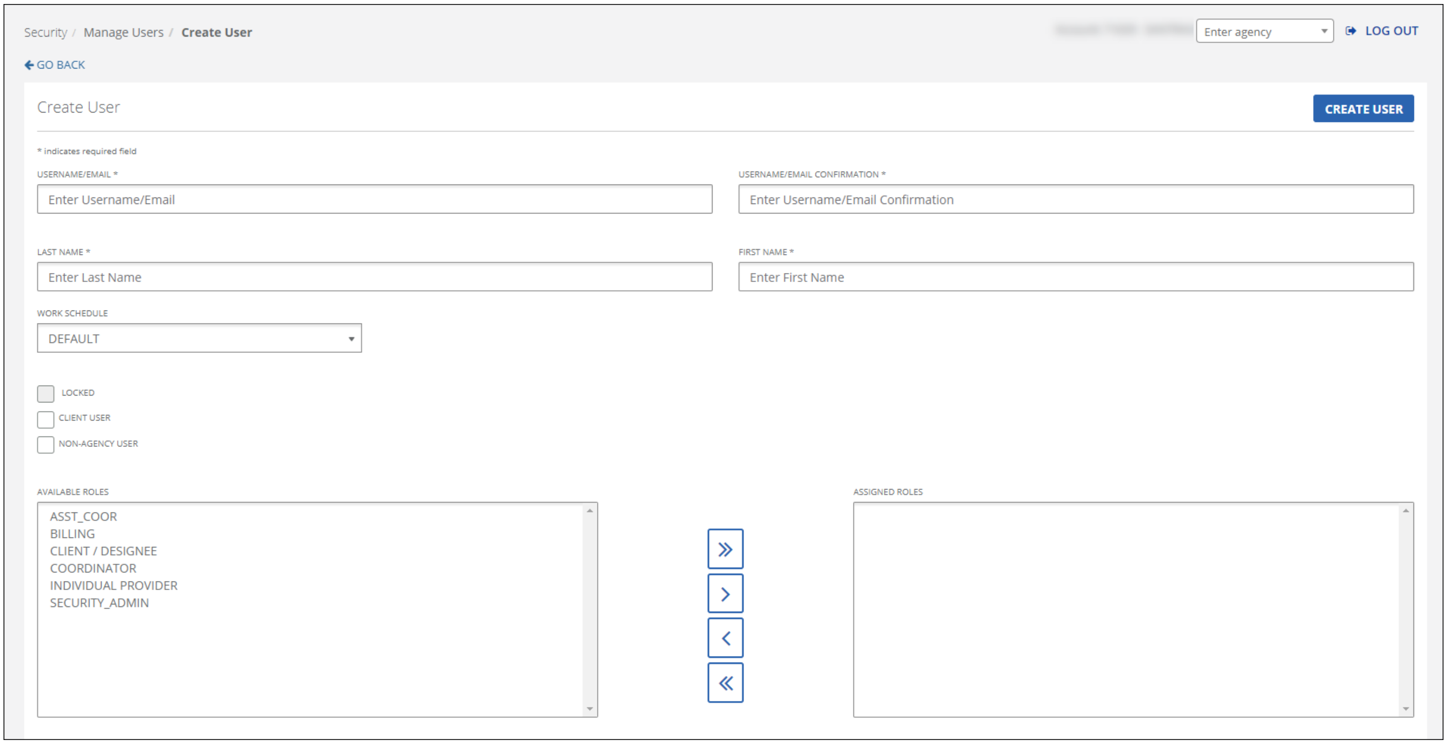
1. Navigate to the Manage Users screen. (**Security > Manage Users**)
2. Enter search criteria.
3. Click **SEARCH**.



Search Users

Create/Edit User

The Create Users screen is where new users are created.



Create New User Screen

Field	Description
CREATE USER	Click this button to save the user's profile.
USERNAME/EMAIL	Use this field to enter a user's email address, which will also be the username. A user's email can't be changed once the profile is saved.
CONFIRM USERNAME/EMAIL	Use this field to confirm a user's email address, which will also be their username.
LAST NAME	Use this field to enter the user's last name.
FIRST NAME	Use this field to enter the user's first name.
LOCKED	Select this checkbox to prevent a user from logging into the system. Uncheck the box to allow access. • The **Locked** checkbox is used to temporarily restrict the user's access to Sandata EVV. Deselect this check-box to restore access.
CLIENT USER	Select to label user as a client.
NON- AGENCY USER	Select to label user as a non-agency user.

Create/Edit User

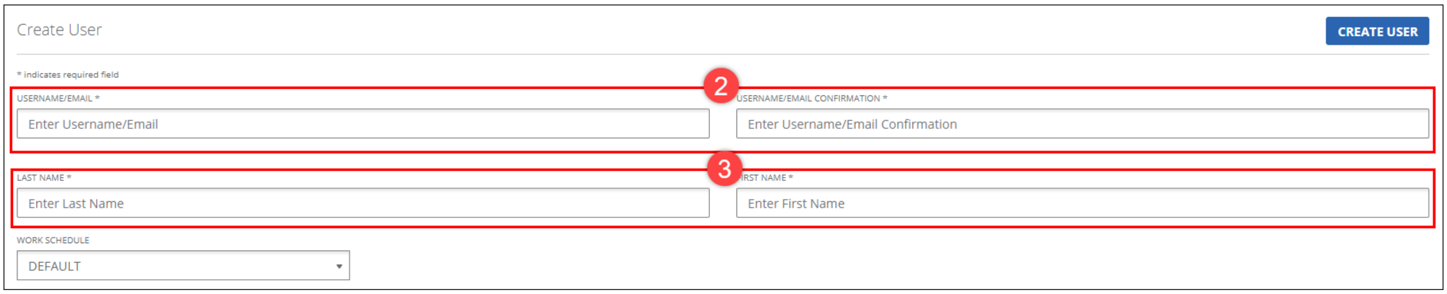
Field	Description
NON-AGENCY USER	Select this checkbox to indicate this user is not affiliated with a provider agency. This field is visible based on system configuration and is only available for non-agency providers.
AVAILABLE ROLES/PRIVILEGE/CLIENTS EMPLOYEES/SUPERVISORS	The items in these fields are available for assignment. • Each system begins with a standard set of roles that can be updated and changed as required. • Privileges should be assigned to roles rather than individual users, whenever possible.
ASSIGNMENT BUTTONS	Use these buttons to move items between the **Available** and **Assigned** fields.
ASSIGNED ROLES/PRIVILEGE/CLIENTS EMPLOYEES/SUPERVISORS	The items in these fields are assigned to the user.

Creating a New User

1. Navigate to the Manage Users screen. (**Security > Manage Users > Create User**)

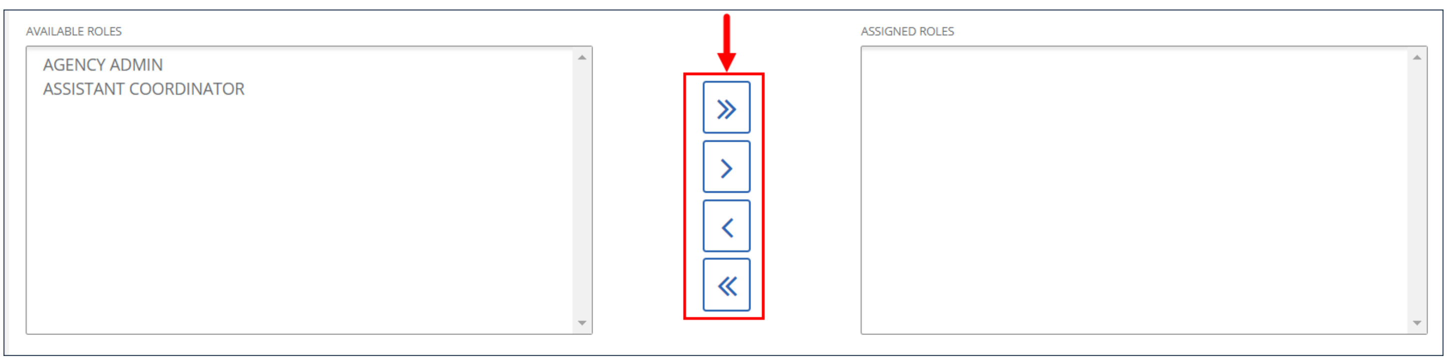
	Note: To prevent duplicate user profiles, search to ensure there is not an existing profile before creating a new user profile.

2. Enter and confirm the new user's email address, this is also the username for this user.
3. Enter the user's **Last Name** and **First Name**.



Create New User

4. Click on a role and use the assignment buttons to move roles between the **AVAILABLE ROLES** and **ASSIGNED ROLES** fields.
The roles in the **Available Role**s field represent all roles that can be assigned to a user. The roles in the **Assigned Roles** field represents which roles are assigned to the user. Assigning multiple roles to a user gives them the privileges assigned to each assigned role.



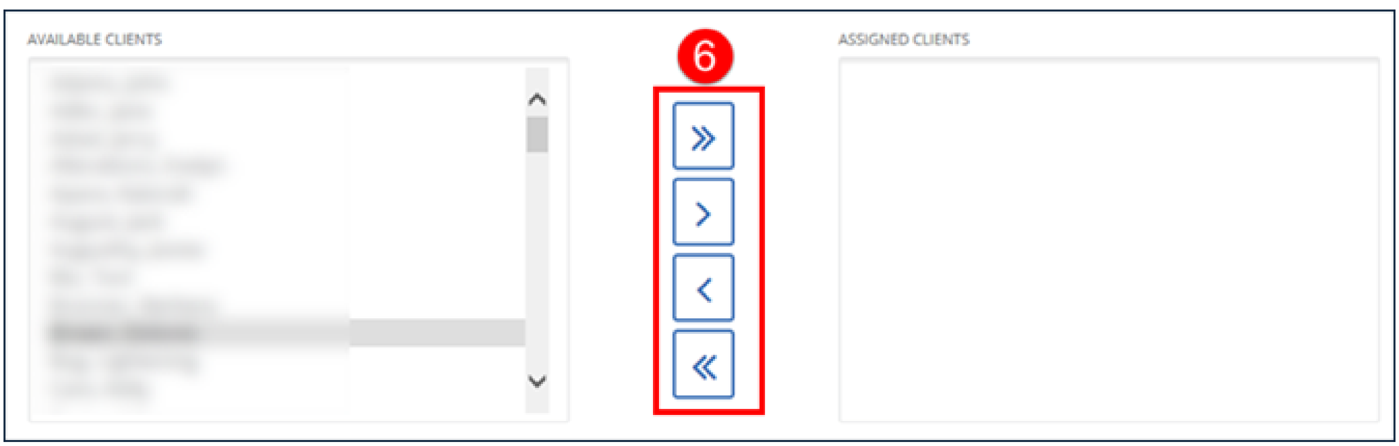
Managing Roles

5. Click on a privilege and use the assignment buttons to move privileges between the **AVAILABLE PRIVILEGES** and the **ASSIGNED PRIVILEGES** fields.
The privileges in the **AVAILABLE PRIVILEGES** field represent all privileges that can be assigned to a user. The privileges in the **ASSIGNED PRIVILEGES** field represent all privileges assigned to the user.

	Note: It is best practice to assign User Roles rather than individual Privileges. This is because privileges may change over time and if changed must be updated for each user assigned that privilege. Updating a user role with a new privilege grants that privilege to every user assigned that user role, making it much easier to manage.

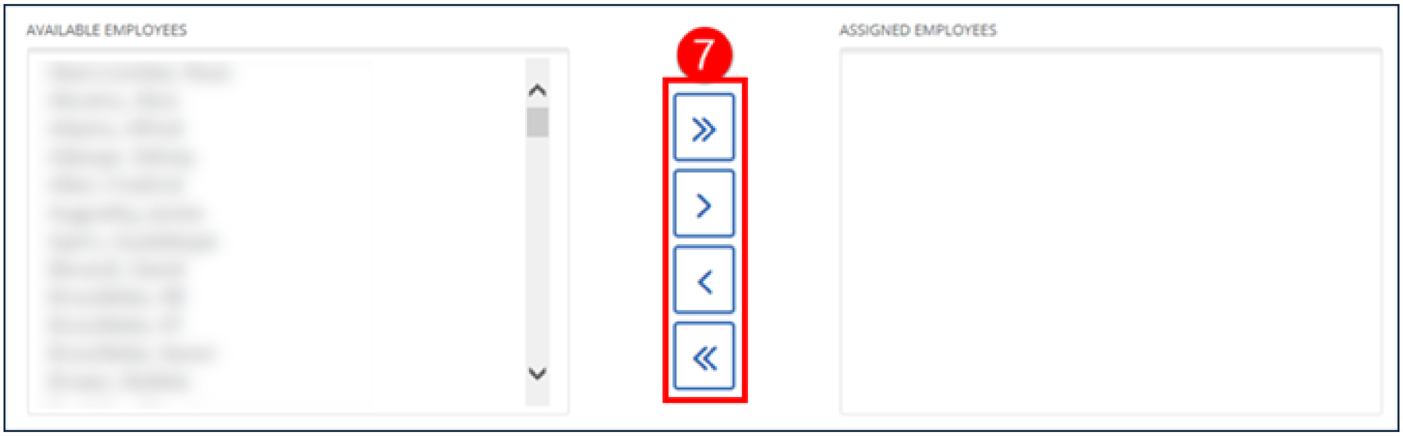
Managing Privileges

6. Click on a client and use the assignment buttons to move clients between the **AVAILABLE CLIENTS** and **ASSIGNED CLIENTS** fields.
The clients in the **AVAILABLE CLIENTS** field represents all clients that can be assigned to the user. The **ASSIGNED CLIENTS** field represents all clients currently assigned to the user. These fields are only available for consumer direct and non-agency accounts.



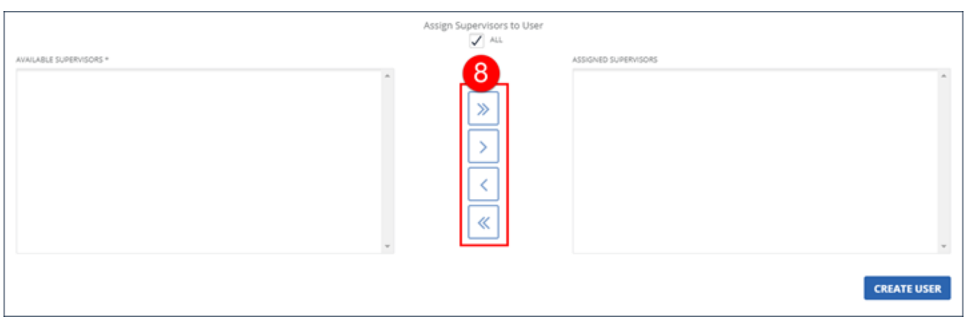
Manage Clients

7. Click on an employee and use the assignment buttons to move employees between the **AVAILABLE EMPLOYEES** and **ASSIGNED EMPLOYEES** fields.
The **AVAILABLE EMPLOYEES** field represents all employees available to be assigned to this user. The **ASSIGNED EMPLOYEES** field represents all employees currently assigned to this user. These fields are only available for consumer direct and non-agency accounts.



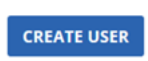
Manage Employees

8. Click on a supervisor and use the assignment buttons to move employees between the **AVAILABLE SUPERVISOR** and **ASSIGNED SUPERVISOR** fields.
The **AVAILABLE SUPERVISORS** field represents all supervisors available to be assigned to this user. The **ASSIGNED SUPERVISORS** field represents all supervisors currently assigned to this user. When no show alerts are enabled, the user receives alerts for the clients of all assigned supervisors.



Assign Supervisors

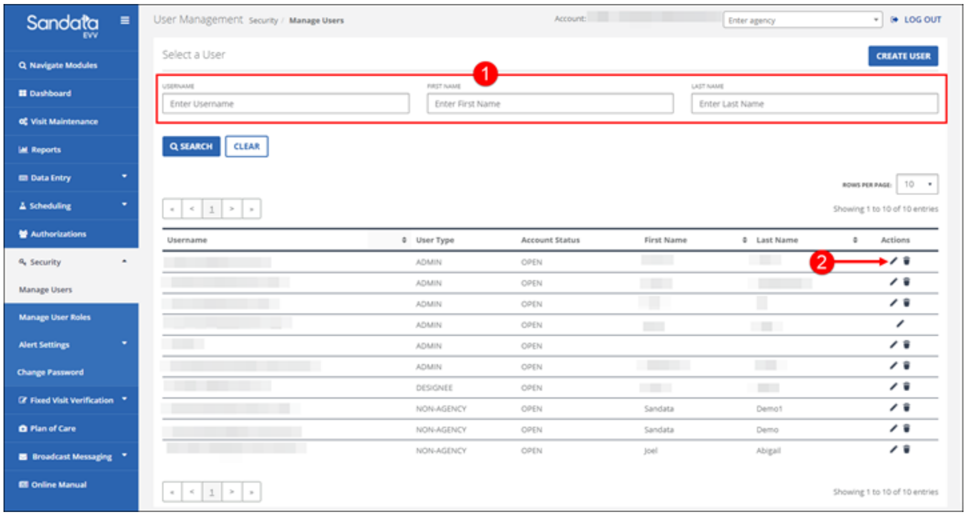
9. Click **CREATE USER.**
The system creates a new user and displays a confirmation message. An email is sent to the new user's email address (also their username) with a temporary password.



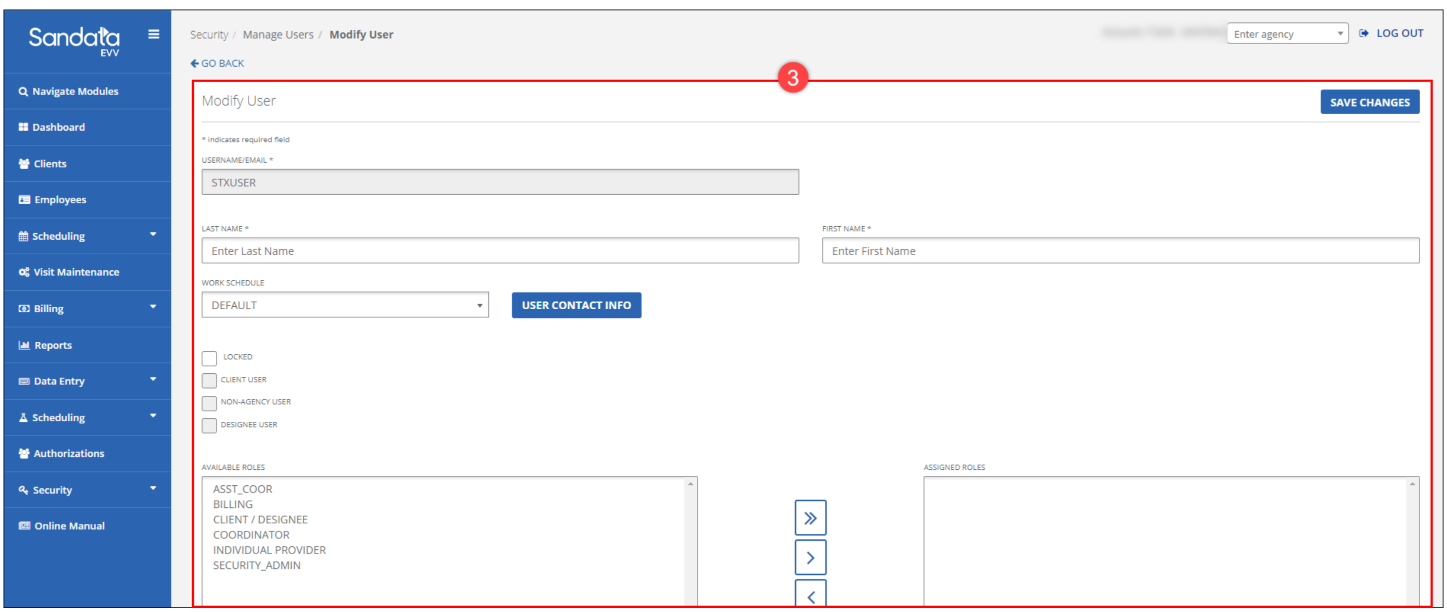
Create User Button

Modifying a User

1. Navigate to the Select a User section of the Manage Users screen and search for a user. (**Security > Manage Users**)
2. Click the **Edit** Icon (✎) for the user.



Select a User Screen

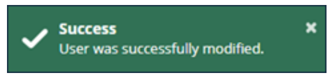


Manage Users

3. Make any changes to the user.
4. Click Modify User.
5. A notification of confirmation or error displays at the top of the screen.

Modify User Button

Modify User Button

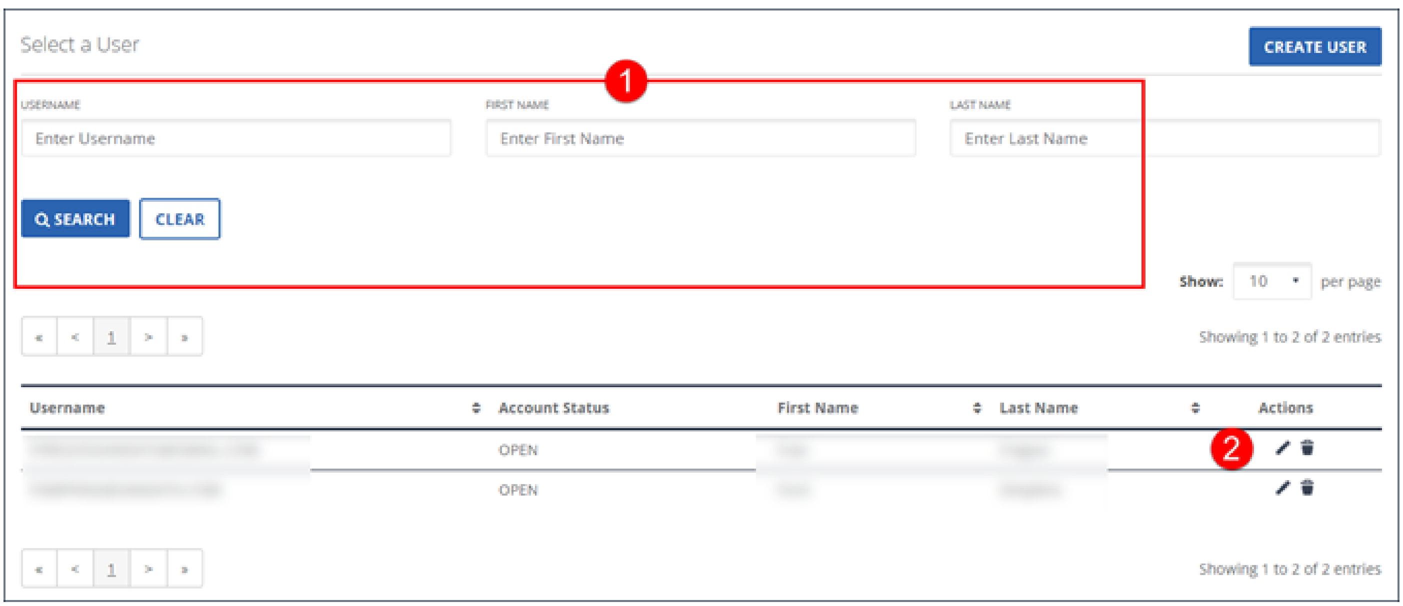


Save Confirmation and Confirmation/Error Notification

<u>Resetting a User's Password</u>

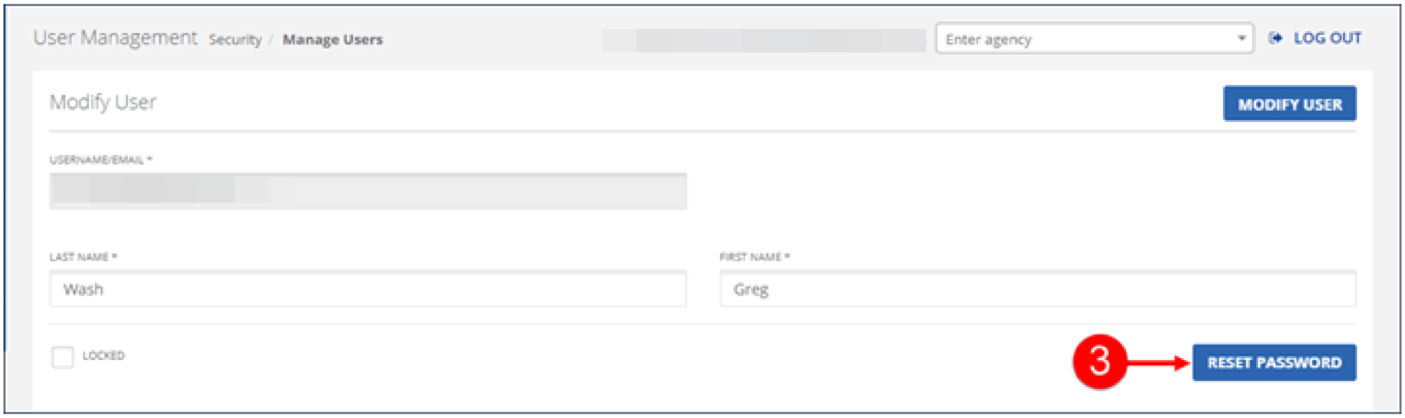
Users with the proper permissions can send a reset password email for another user's password.

1. Navigate to the Modify User screen. (**Security > Manage Users >** search for a user)
2. Click the **Edit** icon ( ) for the user.



User Search

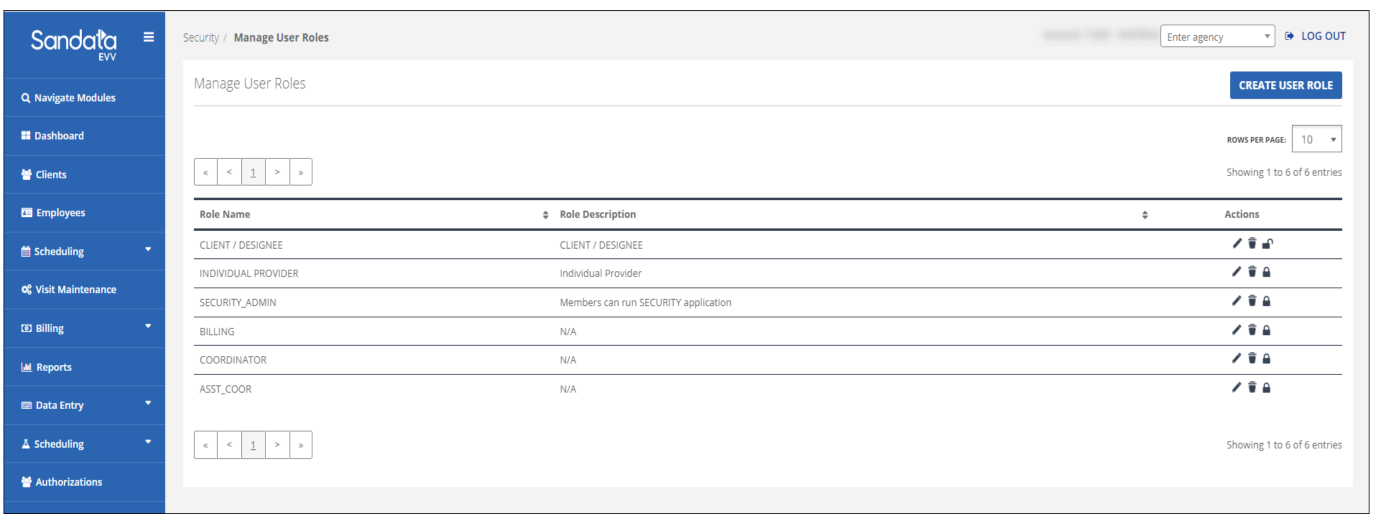
3. Click **RESET PASSWORD**.
A temporary password is emailed to the user. The temporary password expires if it is not used to log into the system within a set period of time. When logging into the system using a temporary password, users are prompted to create a new permanent password.



Reset Password Button

Manage User Roles

User Roles allows users to create a group of system privileges combined into a single, assignable role. A user assigned a User Role is given all the privileges assigned to that role. Edits made to a User Role affect all users assigned that role.

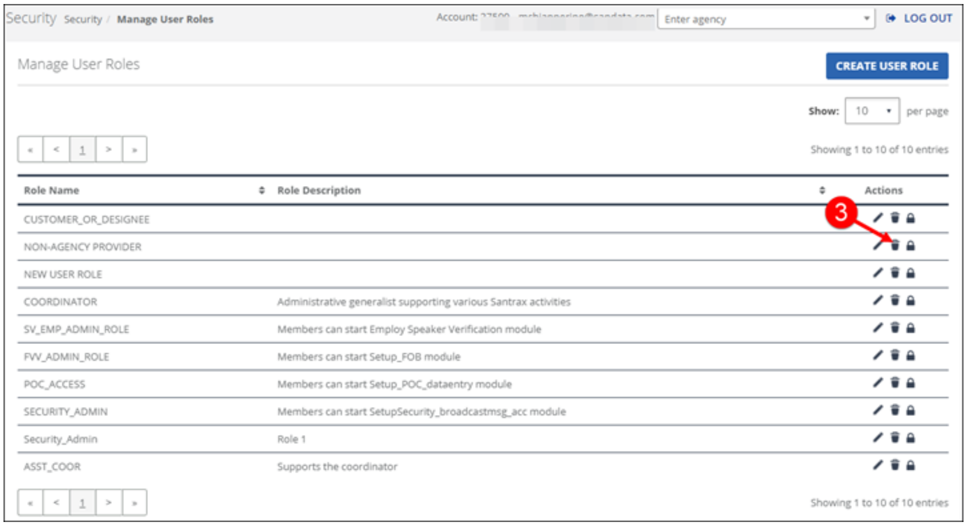


Manage Users Role Screen

Field	Description
CREATE USER ROLE	Click this button to create a new user role.
ROLE NAME	Name of the role.
ROLE DESCRIPTION	Short description of what each role is used for.
ACTIONS	Click to edit, delete, lock or unlock the role.

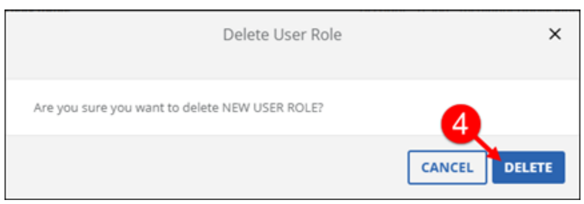
Deactivating User Roles

1. Navigate to the Manage Users screen. (**Security > Manage Users**)
2. Search for a user.
3. Click the **Deactivate** icon ( ).



Deactivating a User

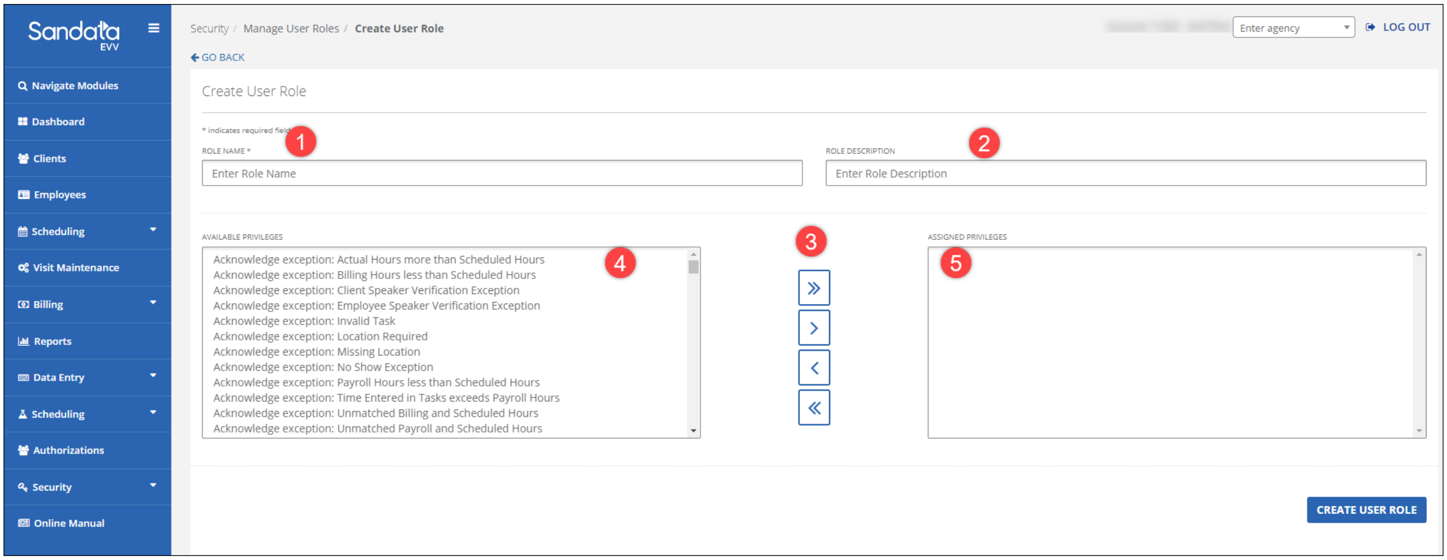
4. Click **DELETE.**



Delete User

Note:
While the pop-up says Delete, the user is only deactivated.

Create/Edit User Role

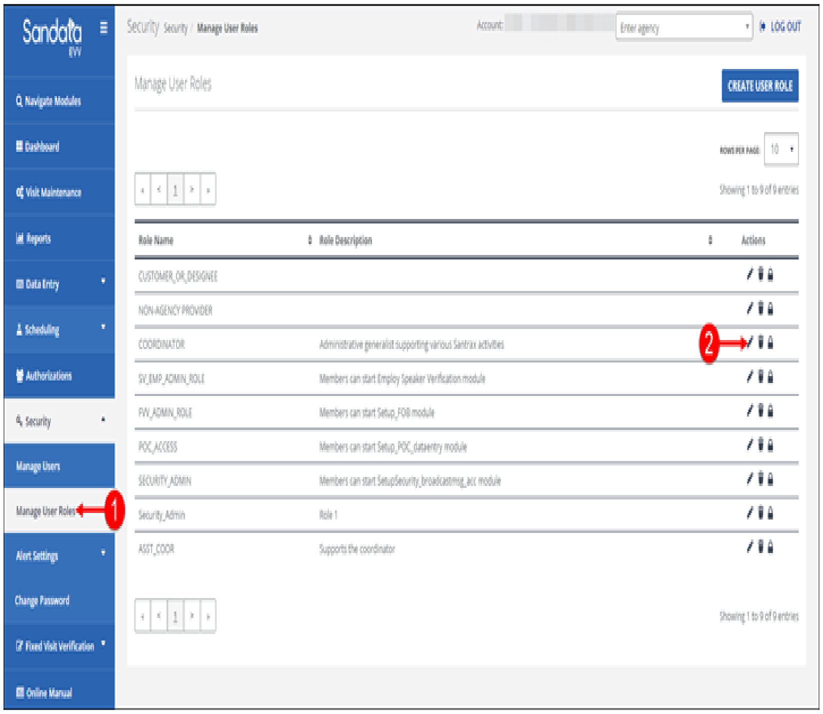


Edit User Role Screen

	Field	Description
1	**Role Name**	Name of user role.
2	**Role Description**	Short description of what each role is used for.
3	**Assignments Buttons**	Use these buttons to move items between the Available and Assigned fields.
4	**Available Privileges**	The system privileges in this field are available to be assigned to the user role but have not been. Privileges shown will vary based on account configuration.
5	**Assigned Privileges**	The system privileges in this field have been assigned to this user role. All users who are assigned this role will have access to these privileges.

<u>Modifying User Roles</u>

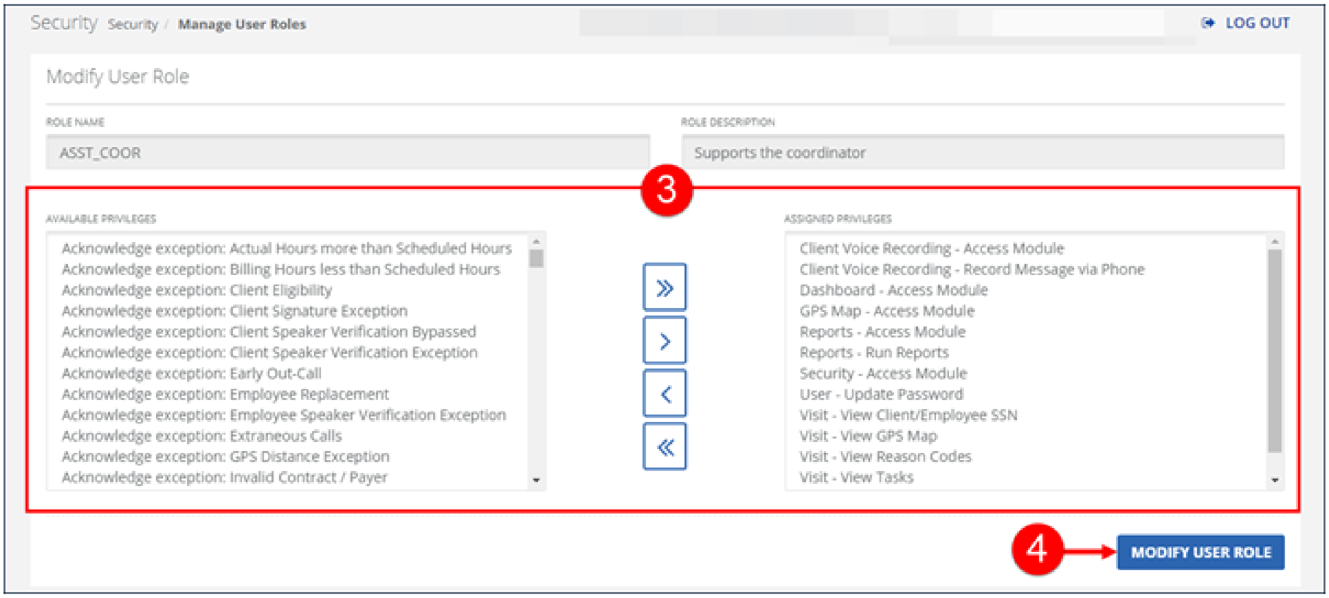
1. Navigate to the **Manage User Roles** screen. (**Security > Manage User Roles**)
2. Click the **Edit** icon ( ) for the role.



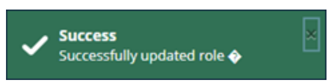
Manage User Roles Screen

3. Change the system privileges for the role by moving them between the **AVAILABLE PRIVILEGES** field and the **ASSIGNED PRIVILEGES** field.

4. Click **MODIFY USER ROLE**.
A notification of confirmation or error displays at the top of the screen.



Modify User Role Screen



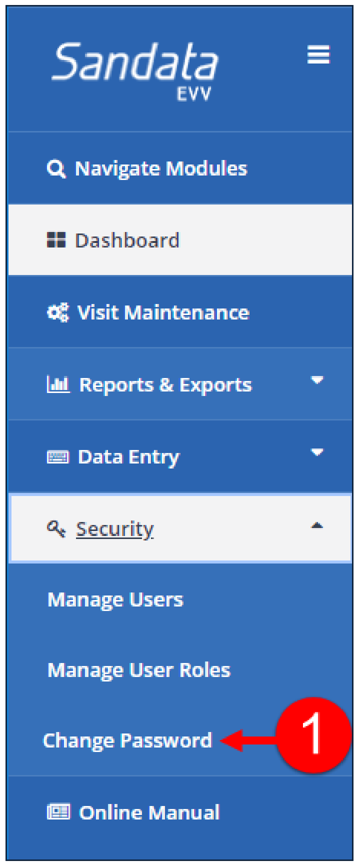
Save Confirmation and Confirmation/Error Notification

Change Password

Users with the correct permissions can use the **Change Password** link to reset the password used to log into Sandata EVV.

Change Password Instructions

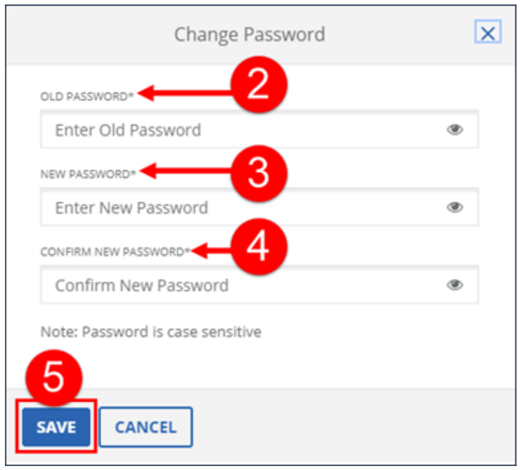
1. Navigate to the Change Password screen. (**Security > Change Password**)



Path to Change Password Screen

2. Enter the current password in the **OLD PASSWORD** field.
3. Enter the new password in the **NEW PASSWORD** field.
4. Re-Enter the new password in the **CONFIRM PASSWORD** field.
5. Click **SAVE**.

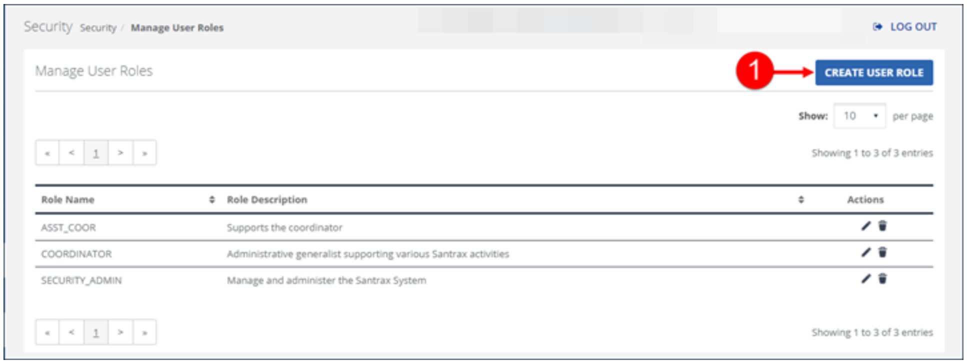
A notification of confirmation or error displays at the top of the screen.



Change Password Screen

Creating a New User Role

1. Navigate to the User Roles screen. (**Security > Manage User Roles >** Click **CREATE USER ROLE**)



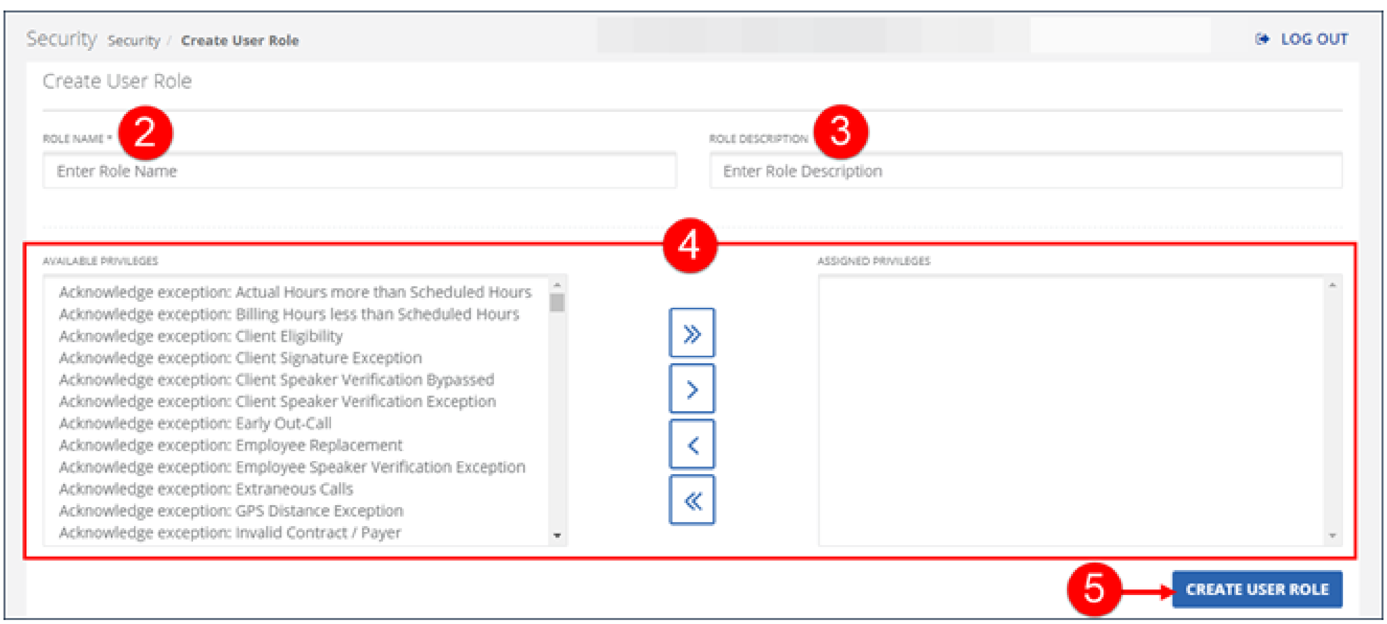
Manage User Roles Screen

2. Enter the **ROLE NAME**.

3. Enter the **ROLE DESCRIPTION**.

4. Click on a privilege and use the assignment buttons to move privileges between the **AVAILABLE PRIVILEGES** and **ASSIGNED PRIVILEGES** fields.
The **AVAILABLE PRIVILEGES** field represents all privileges available to be assigned to this User Role. The **ASSIGNED PRIVILEGES** fields represent all privileges currently assigned to this user.

5. Click **CREATE USER ROLE**.



Create User Roles

Alert Settings

From the Alert Setting section users can control who receives alerts and how or when those alerts are delivered.

Alerts, if configured, are sent when a scheduled visit has not received the call in within a configurable window. Up to 5 escalating alerts can be configured and sent.

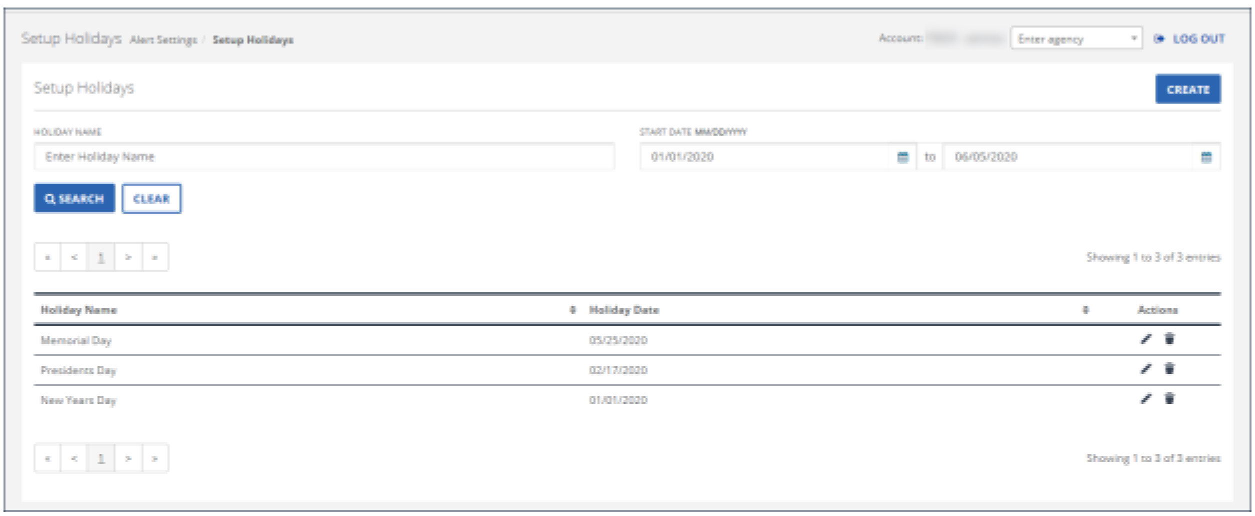
Clients are assigned a ‘supervisor’. This is a code which is associated with an individual or set of individuals. Based on user security setup, the associated user(s) can receive either an email or text message for missed schedules. For example, supervisors may wish to only receive alerts during non-work hours.

The following screens allow for further setup of the alerting function.

Setup Holidays

From the Setup Holidays screen users can temporarily suspend alerts for a specified holiday or date.

(**Security > Alert Settings > Setup Holiday**)



Setup Holiday Screen

<u>Fields</u>

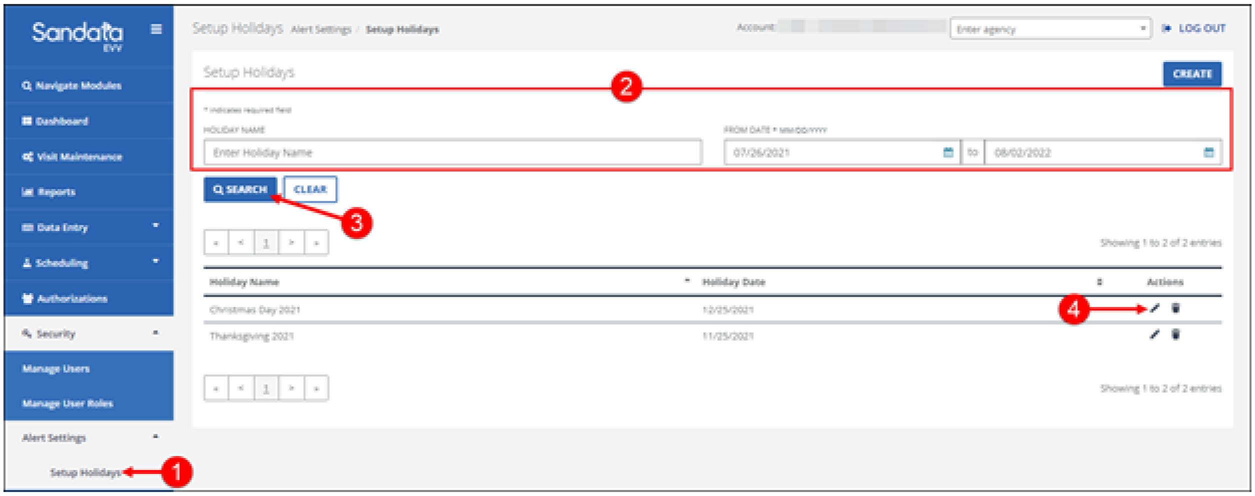
Field	Description
HOLIDAY NAME	Used to limit results based on the holiday's name.
START DATE (MM/DD/YYYY)	Used to select the date range, all holidays that occur within the selected date range display in the search results.

<u>Columns</u>

Column	Description
Holiday Name	Displays the name of the holiday.
Holiday Date	Displays the date the holiday occurs.

Searching for Holidays

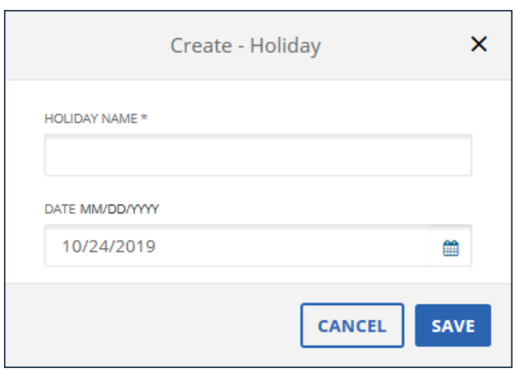
1. Navigate to the **Setup Holiday** screen. (**Security** > **Alert Settings** > **Setup Holiday**)
2. Enter the search criteria.
3. Click **SEARCH**.
4. Click the **Edit** icon (✎) to view the **Edit Holiday** screen.



Setup Holiday Screen

Create Holiday

The following screen allows account level configuration of a holiday calendar.

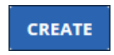


Create Holiday Screen

Field	Description
HOLIDAY NAME	Enter the name of the holiday.
HOLIDAY DATE (MM/DD/YYYY)	Select the date the holiday occurs.

Creating a Holiday

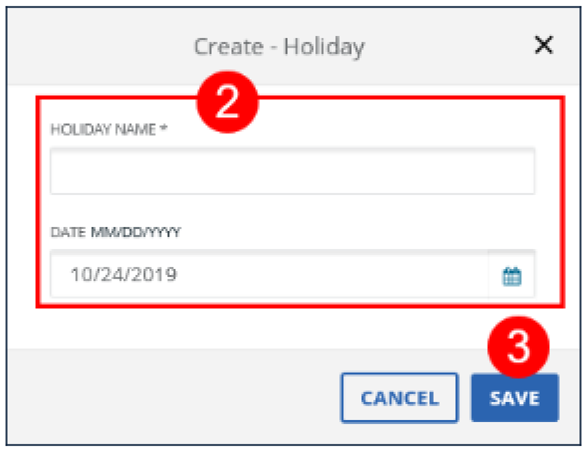
1. Navigate to the Create - Holiday screen. (**Security** > **Alert Settings** > **Setup Holiday** > **Create**)



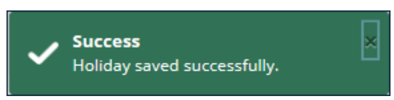
Create Button

2. Enter/Select all applicable fields.

3. Click **SAVE**.
A notification of confirmation or error displays at the top of the screen.



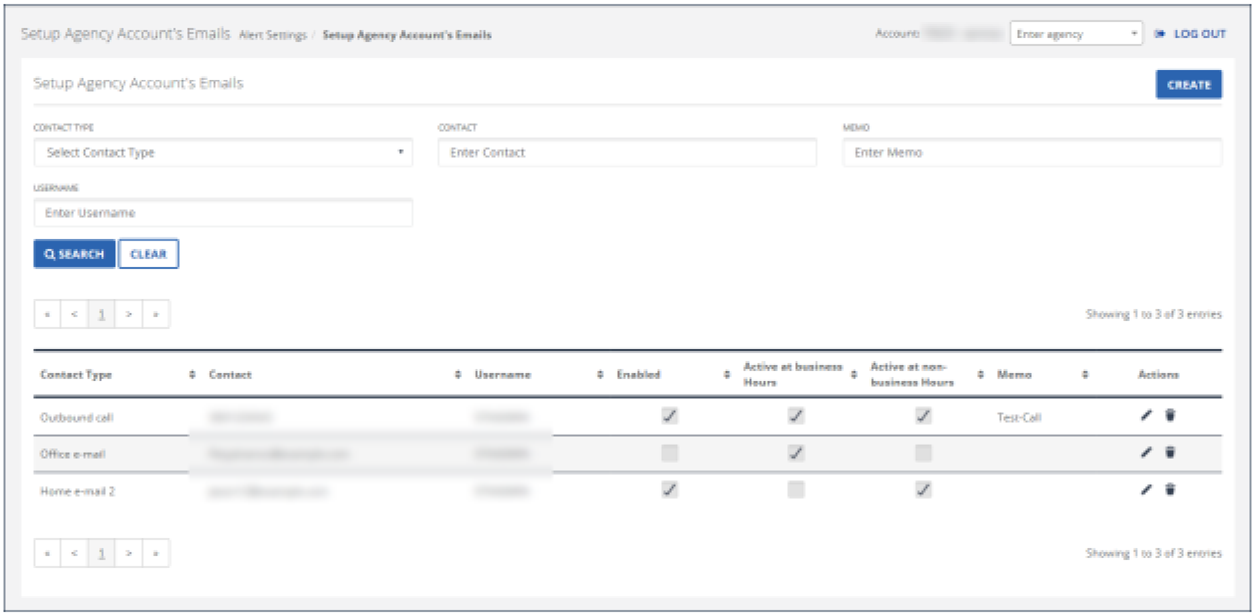
Create Holiday Screen



Save Confirmation and Confirmation/Error Notification

Setup Agency Account's Emails

From the Setup Agency Account's Emails screen users manage which email addresses receive alerts. (**Security** > **Alert Setting** > **Setup Agency Account's Emails**)



Setup Agency Account’s Emails Screen

Fields

Field	Description
CONTACT TYPE	Used to limit results based on the assigned contact type.
CONTACT	Used to limit the results to email addresses that contain the text entered.
MEMO	Used to limit the results to those with memos that contain the text entered.
USERNAME	Used to limit the result based on the associated username. The username entered must be an exact match for the one on the record.

Columns

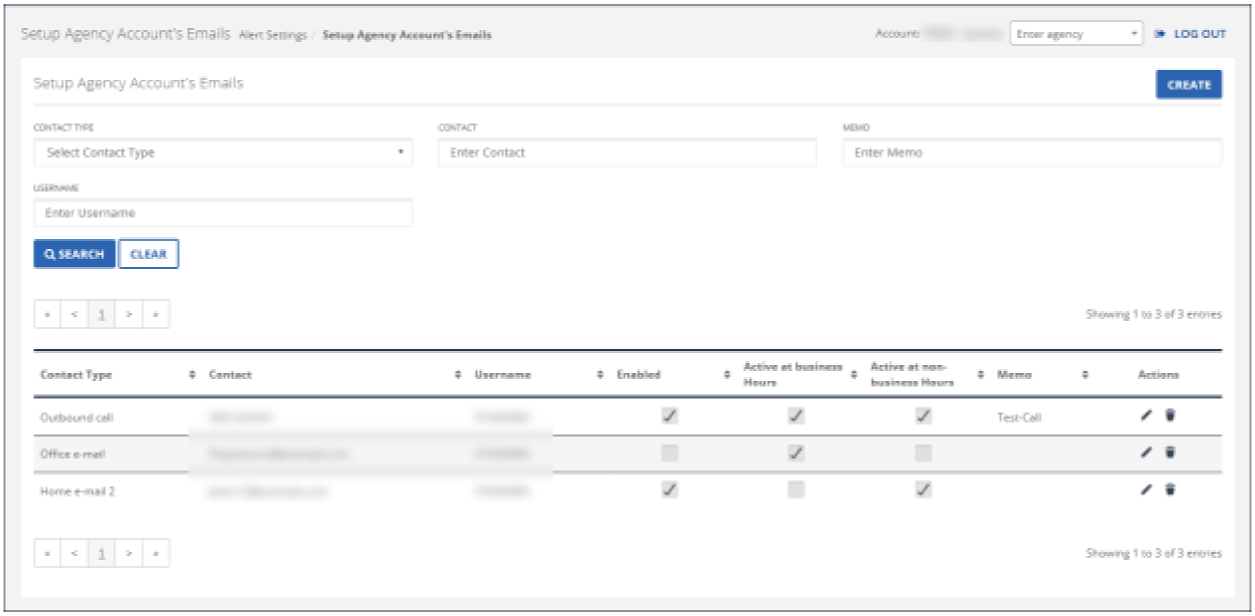
Column	Description
Contact Type	Displays the name of the type of emails address.
Contact	Displays the email address that will receive the alert.
Username	Displays the username of the user that entered the contact.
Enabled	Indicates if the email address is currently able to receive alerts.

Columns

Column	Description
Active at business Hours	Indicates the email address only receives alerts during business hours.
Active at non-business Hours	Indicates the emails address receives alerts after business hours and during holidays.
Memo	Displays any additional notes affiliated with the record.

Searching for Agency Account's Email

1. Navigate to the **Setup Agency Account's Emails screen**. (**Security** > **Alert Setting** > **Setup Agency Account's Emails**)
2. Enter the search criteria.
3. Click **SEARCH**.
4. Click the **Edit** icon (✎) to view the **Edit - Agency Account's Email** screen.



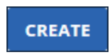
Setup Agency Account's Emails Screen

Creating Agency Accounts Email

Use this process to create an email for a contact to receive alerts.

1. Navigate to the Create - Agency Account's Email screen.
(**Security > Alert Settings > Setup Agency Account's Emails > Create)**

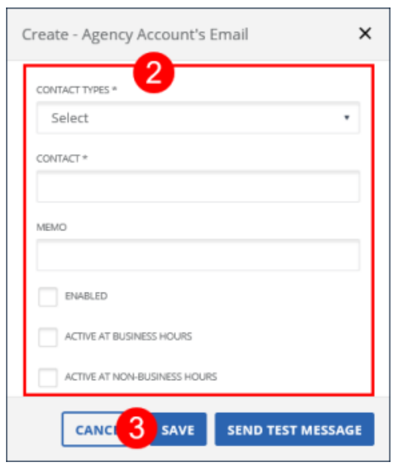
Note:
When creating an Agency Account Email for an internal user please use the **USER CONTACT INFO** button (USER CONTACT INFO)on the Manage User screen. This links the Agency Account Email to the user's username.



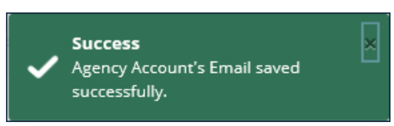
Create Button

2. Enter/Select all applicable fields.

3. Click **SAVE.**
A notification of confirmation or error displays at the top of the screen.



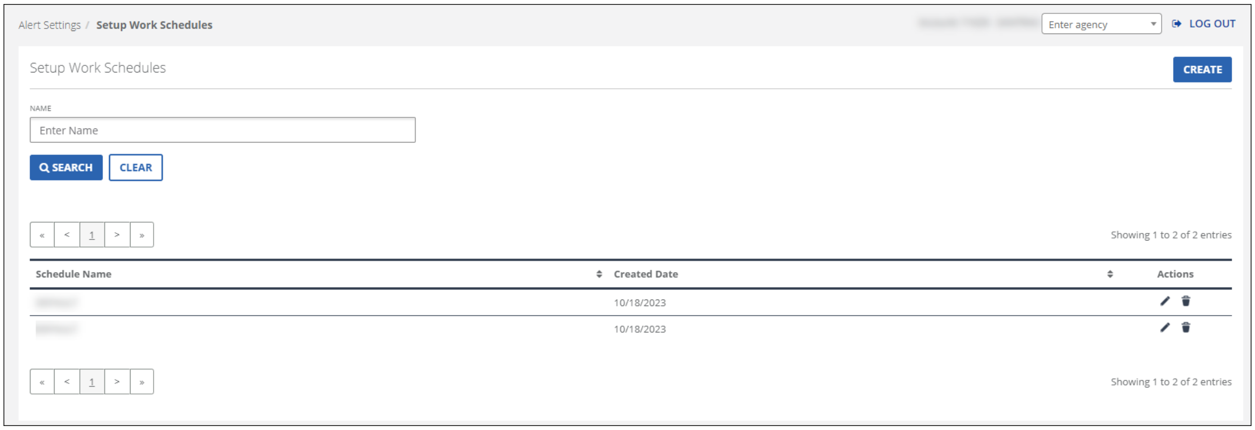
Create - Agency Account’s Email Screen



Save Confirmation and Confirmation/Error Notification

Setup Work Schedules

From the Setup Work Schedules screen users can create a schedule to define the workdays and control when alerts are sent (during the workday or after hours).



Setup Work Schedules Screen

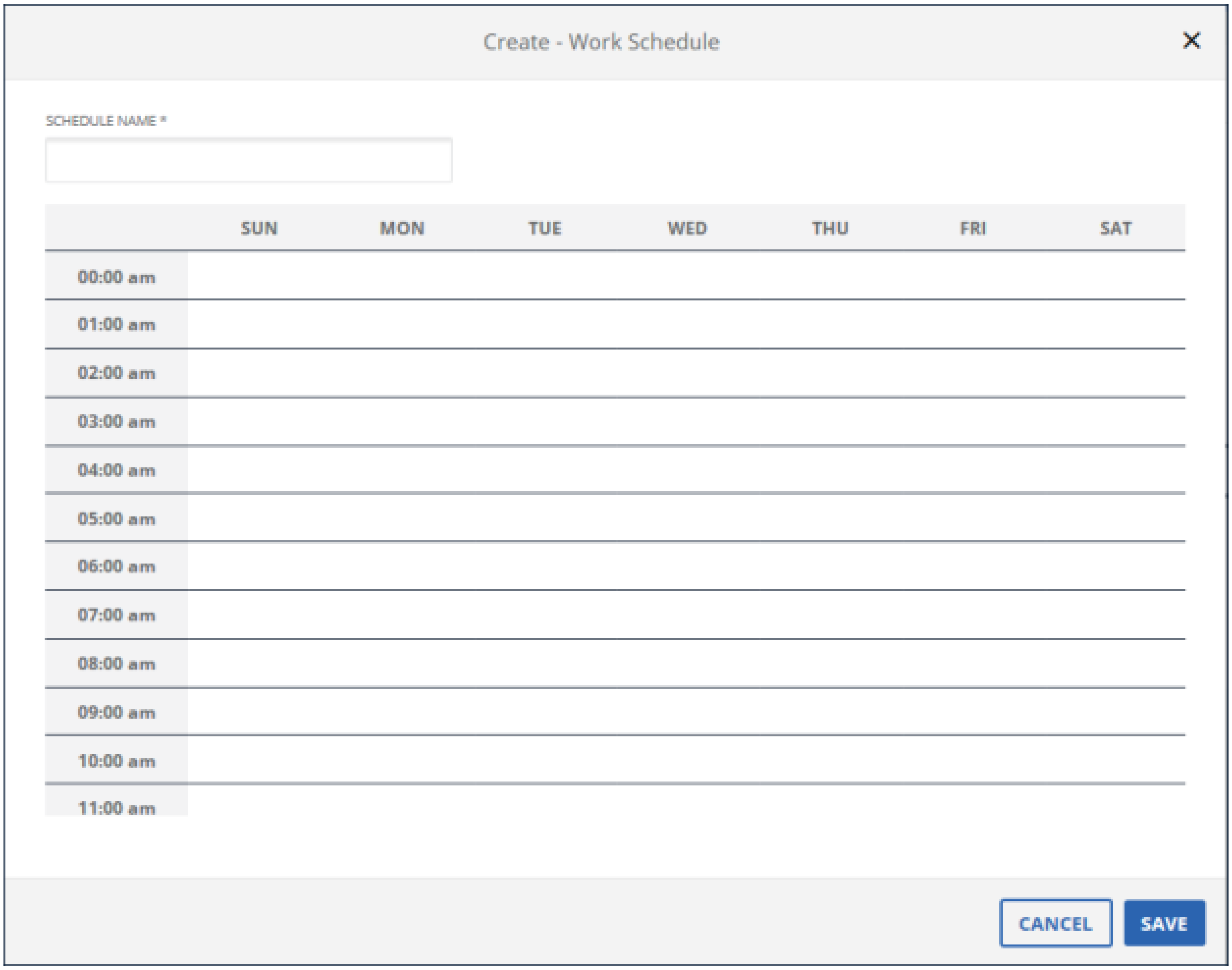
<u>Fields</u>

Field	Description
NAME	Used to limit results based on the schedule’s name.

<u>Columns</u>

Column	Description
Schedule Name	Displays the name of the schedule.
Created Date	Displays the schedule's creation date.
Actions	Click to add or delete.

Create Work Schedule



Create - Work Schedule

Field	Description
SCHEDULE NAME	Enter the schedule's name/description .
Calendar/time grid	Click a time/date cell to turn the cell green and indicate work hours can be sent. These schedules identify work vs. off hours to define when alerts are sent.

Searching for Work Schedules

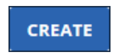
1. Navigate to the **Setup Agency Account's Emails** screen. (**Security** > **Alert Setting** > **Setup Work Schedules**)
2. Enter the search criteria.
3. Click **SEARCH**.
4. Click the **Edit** icon () to view the **Edit - Work Schedules** screen.

Setup Work Schedules Screen

Creating a Work Schedule

This process is used to define when an alert is sent. As a default, alerts are sent between the hours or 9AM and 5PM. Work schedules are used to define alternate times and are assigned at the Manage User screen.

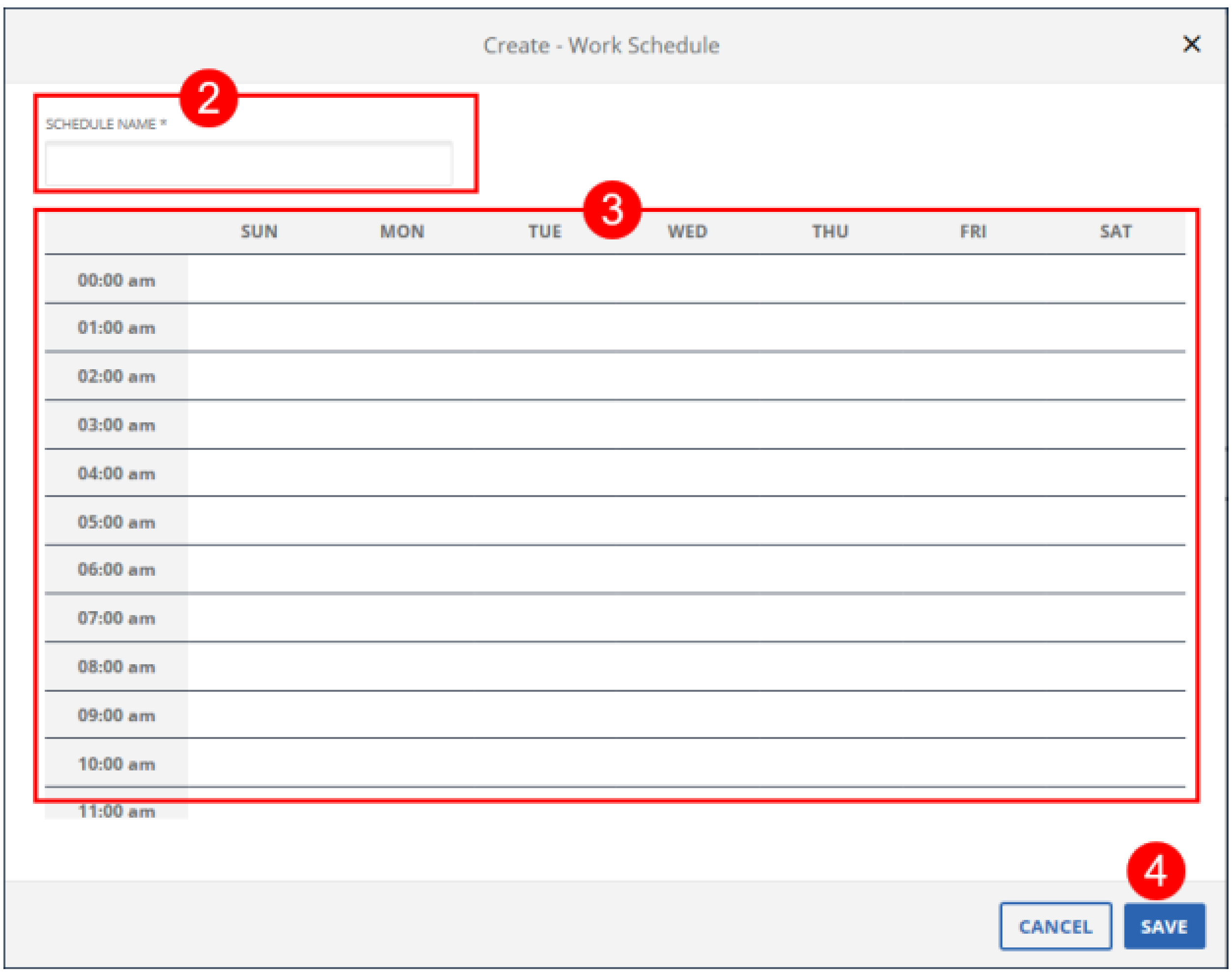
1. Navigate to the Create - Work Schedule screen. (**Security** > **Alert Settings** > **Setup Work Schedules** > **Create**)



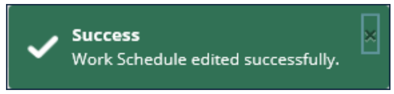
Create Button

2. Enter the **Schedule Name** (description).
3. Click all applicable fields date/time cells.
4. Click **SAVE**.

A notification of confirmation or error displays at the top of the screen.



Create - Work Schedule



Save Confirmation and Confirmation/Error Notification

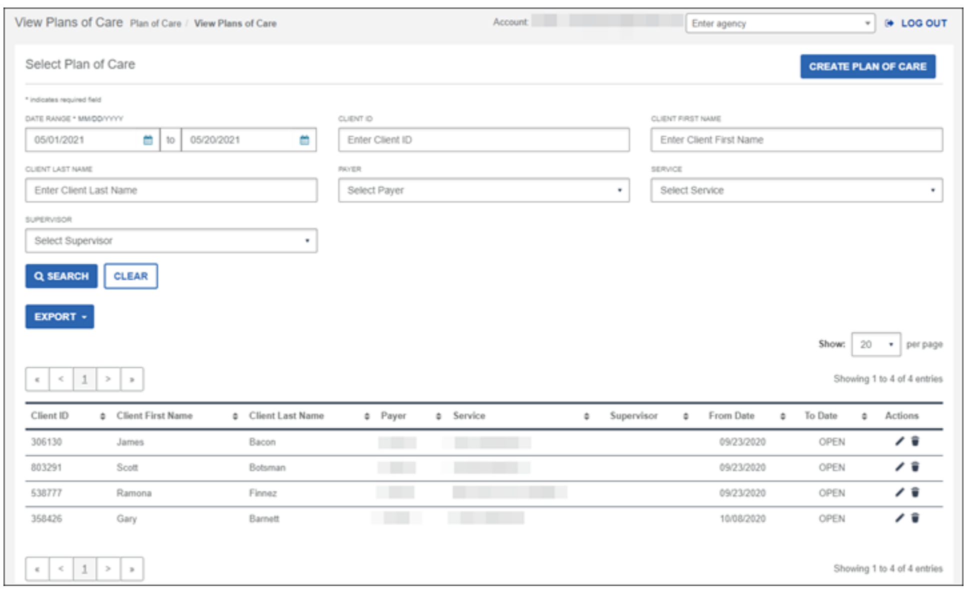
Plan of Care

The Plan of Care section details how to search for, edit, and create a client Plan of Care (PoC) in Sandata Electronic Visit Verification. Plan of Care information is important to ensure the consistency of care. If the Plan of Care is received from a third party via an interface feed, the following screens are available in a view-only mode.

The Plan of Care is a record of tasks to be performed within a defined time frame for each individual client. A PoC acts as a schedule for tasks including when various tasks should be performed. It can be used to compare tasks which should have been performed to the tasks actually performed during each visit. Clients can have multiple PoCs with overlapping date ranges, as long as each PoC is for a different service.

View Plans of Care Screen

The screen below allows the user to search for Plans of Care using the search criteria shown. Use the export button to export the search results in an excel format.



View Plans of Care Screen

Fields and Buttons

Field	Description
DATE RANGE	Use these fields to select the start and end dates of the search. All visits that began within the selected date range will display in the search results.
CLIENT ID	Use this field to search for a single client based on the assigned client's ID. NOTE: Client ID is always numeric and may be provided by a third party or assigned by Sandata.

Field	Description
CLIENT FIRST NAME	Use this field to search for clients based on first name. If a partial name is entered, matches will display based on the entered characters.
CLIENT LAST NAME	Use this field to search for clients based on last name. If a partial name is entered, matches will display based on the entered characters.
PAYER	Use this drop-down field to limit the results to a single payer. All payer drop-down options have defined date ranges identifying when the payer was valid for the account. If a date range has already been entered, payers that fall outside the date range will not display in the drop-down.
SERVICE	Use this field to limit the results by the selected service. All service drop-down options have defined date ranges when the service is valid for the account. If a date range has already been entered, services that fall outside the date range will not display in the drop-down.
SUPERVISOR	Use this field to limit the results to client's associated with the selected supervisor/supervisor code.
Create Plan of Care button 	Click this button to create a new plan of care.

View Plans of Care Screen Results List

<u>Columns</u>

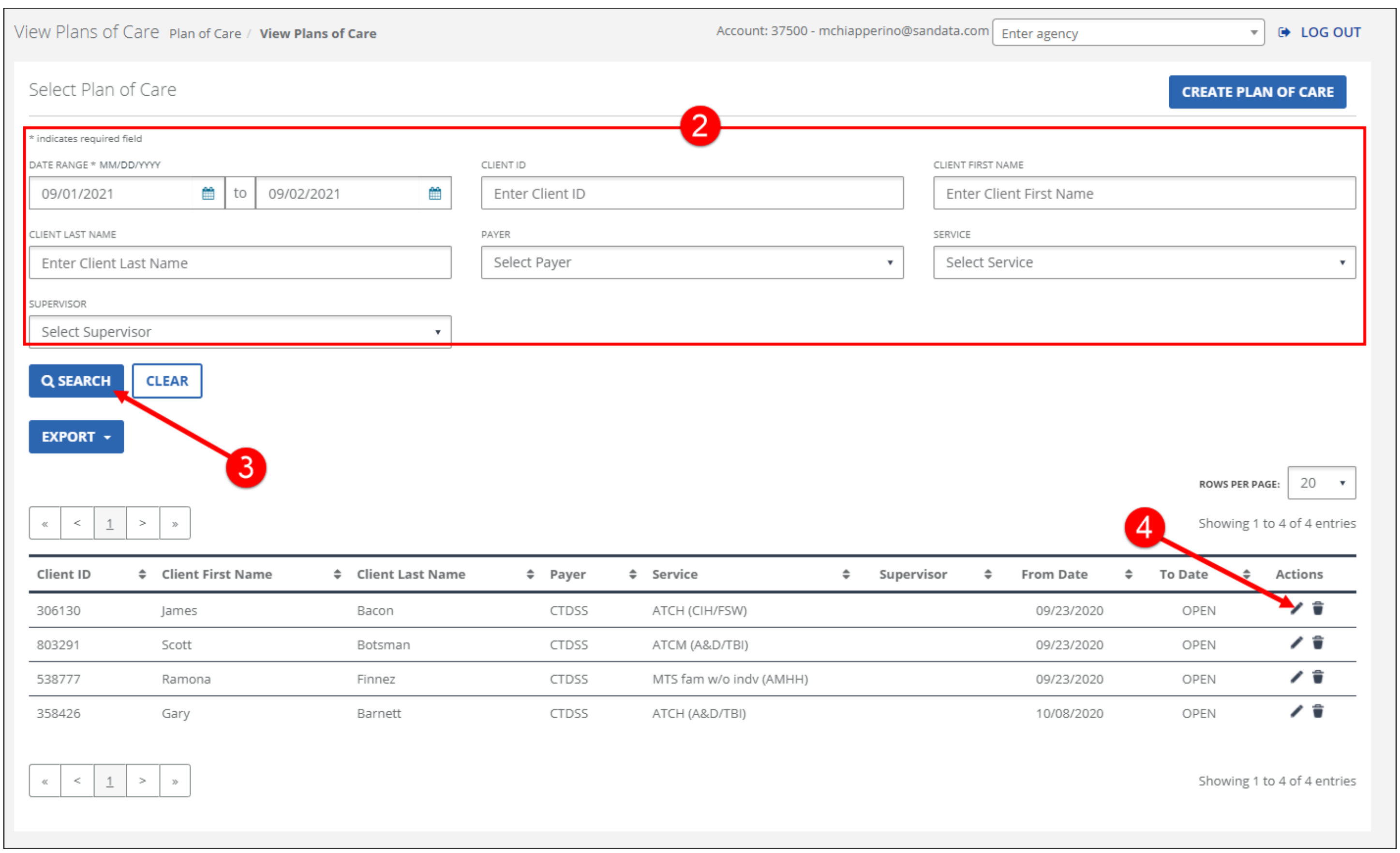
Field	Description
Client ID	Displays the client's ID #.
Client First Name	Displays the client's first name.
Client Last Name	Displays the client's last name.
Payer	Displays the payer for the plan of care.

Field	Description
Service	Displays the service for the plan of care. This may be the same as the HCPCS code.
Supervisor	Use this field to limit the results to client's associated with the selected supervisor/supervisor code.
Begin Date	Displays the Begin Date on the plan of care.
End Date	Displays the End Date on the plan of care.

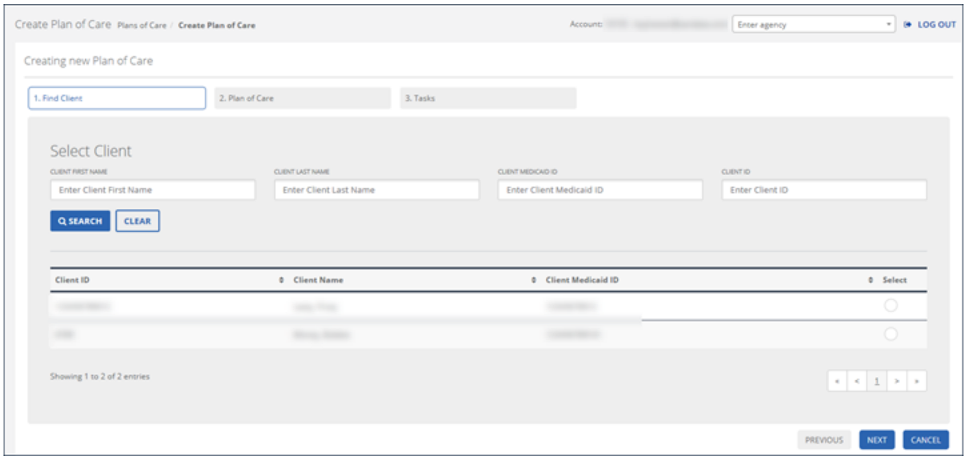
Searching for a Plan of Care

1. Navigate to the View Plans of Care screen. (**Plan of Care**).
2. Enter the search criteria.
3. Click **SEARCH**.
4. Click the **Edit** icon ( ) icon to view the Creating New / Editing Plan of Care screen.

Note:
Searching with no criteria selected displays a complete list of all Plans of Care which were active during the selected date range.



Creating New/Editing Plan of Care Screen

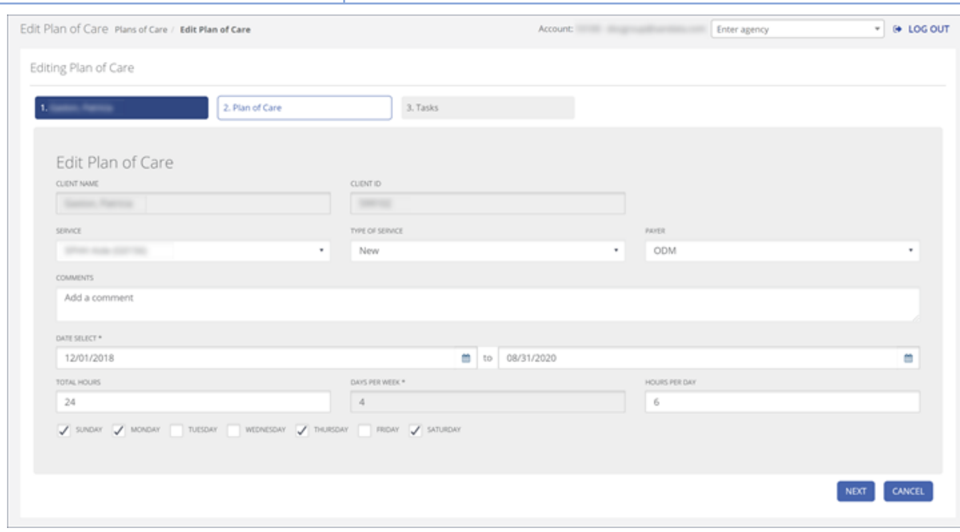


Create Plan of Care: Find Client Tab

<u>Fields and Buttons: Find Client Tab</u>

The following fields are available on the Find Client tab.

Field	Description
CLIENT LAST NAME	Enter the client's first name.
CLIENT FIRST NAME	Enter the client's last name.
CLIENT MEDICAID ID	Enter the client's Medicaid ID number.
CLIENT ID	Enter the client's ID number.

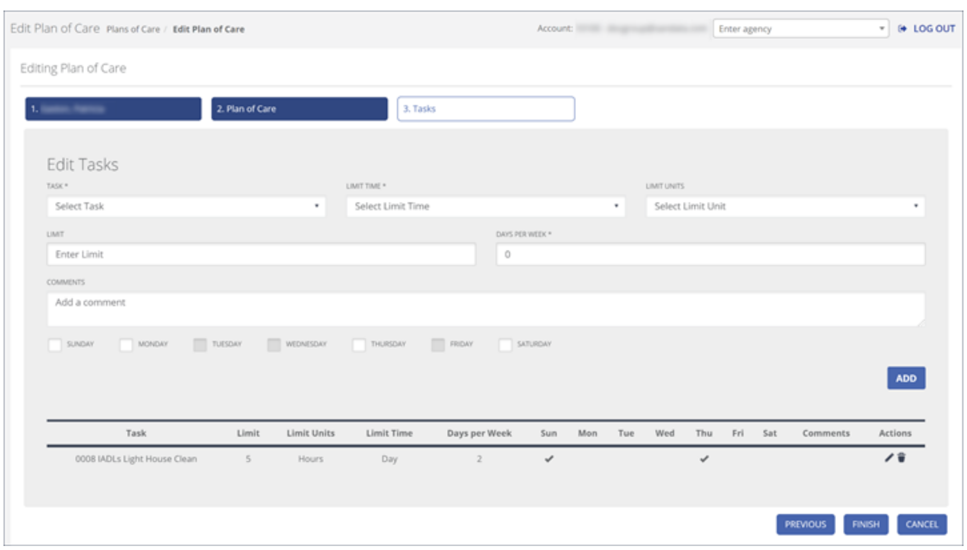


Create Plan of Care: Plan of Care Tab

<u>Fields and Buttons: Plan of Care Tab</u>

The following fields are available on the Plan of Care tab.

Field	Description
CLIENT NAME	Displays the client's first name based on the selected client.
CLIENT ID	Displays the client's ID number.
SERVICE	Select the service.
TYPE OF SERVICE	Select a drop-down option to indicate if the service entered is new, a replacement, or a resumption of care.
PAYER	Select the client's payer.
COMMENTS	Enter comments related to the client's plan of care, if applicable.
DATE SELECT	Select the beginning and ending dates of the client's plan of care.
TOTAL HOURS	Displays the total number of task hours permitted for the client's plan of care. This field automatically populates based on the days of the week selected and the **HOURS PER DAY** entered.
DAYS PER WEEK	Displays the total number of days tasks may be performed. This field automatically populates when the boxes below indicating day of the week are selected or de-selected.
HOURS PER DAY	Enter the total number of hours permitted each day.



Create Plan of Care: Tasks Tab

Fields and Buttons: Tasks Tab

The following fields are available on the Tasks tab.

Fields and Buttons: Tasks Tab

Field	Description
TASK	Select the task to be added to the plan of care.
LIMIT TIME	Select the time frame for the task.
LIMIT UNITS	Select the units for the limit.
LIMIT	Enter the number of units to limit the task. This field will only accept numeric characters.
DAYS PER WEEK	Displays the number of days the task must be performed/scheduled. This field automatically populates when the boxes below indicating day of the week are selected or de-selected.
COMMENTS	Comments for the task.
ADD	Adds the task to the plan of care.

Note:
The Finish button does not display on a Plan of Care that has been closed.

Creating a Plan of Care

	Note: Only one Plan of Care can be created per client.

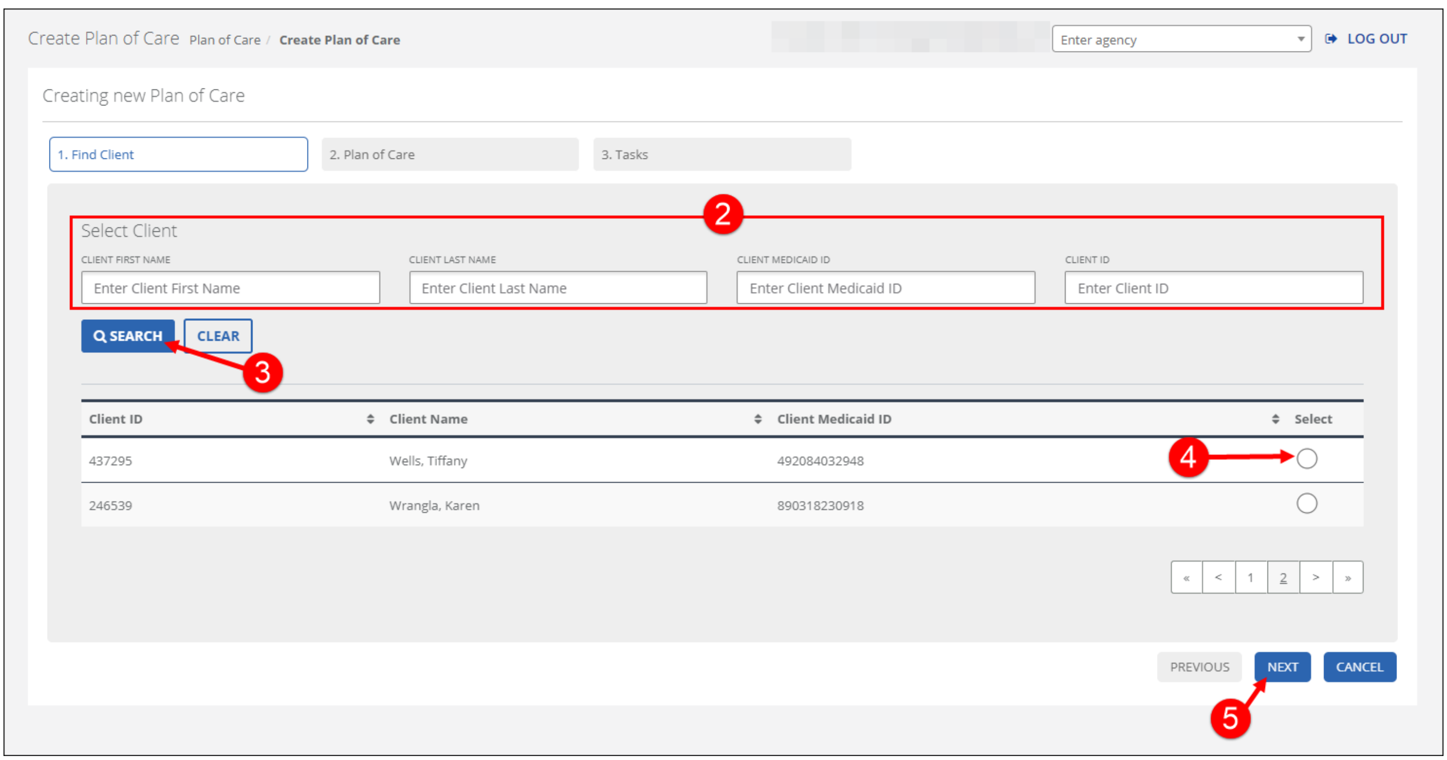
1. Navigate to the Creating New Plan of Care screen. (**Plan of Care** > **Create Plan of Care**)

Create Plan of Care Button

2. Enter the search criteria.
3. Click **SEARCH**.

	Note: Searching with no criteria entered displays a complete list of clients.

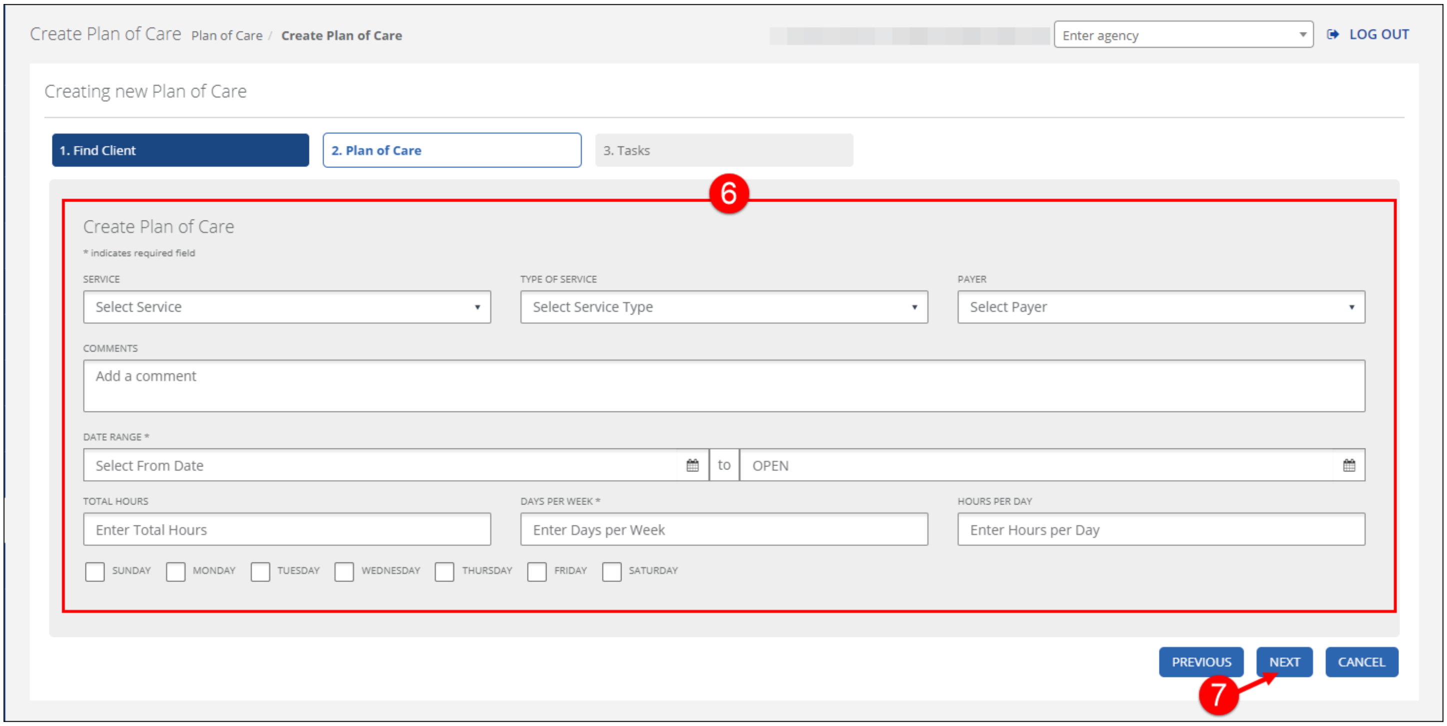
4. Select the client using the Select column.
5. Click **NEXT**.



Create Plan of Care: Select Client Screen

6. Enter/Select all applicable fields on the Plan of Care tab.
The **DAYS PER WEEK** field will automatically populate based on the days of the week selected.
The **TOTAL HOURS** field will automatically populate based on the **HOURS PER DAY** field and the days of the week selected.
For example, **6 HOURS PER DAY** X 4 days selected= **24 TOTAL HOURS**

7. Click **NEXT**.

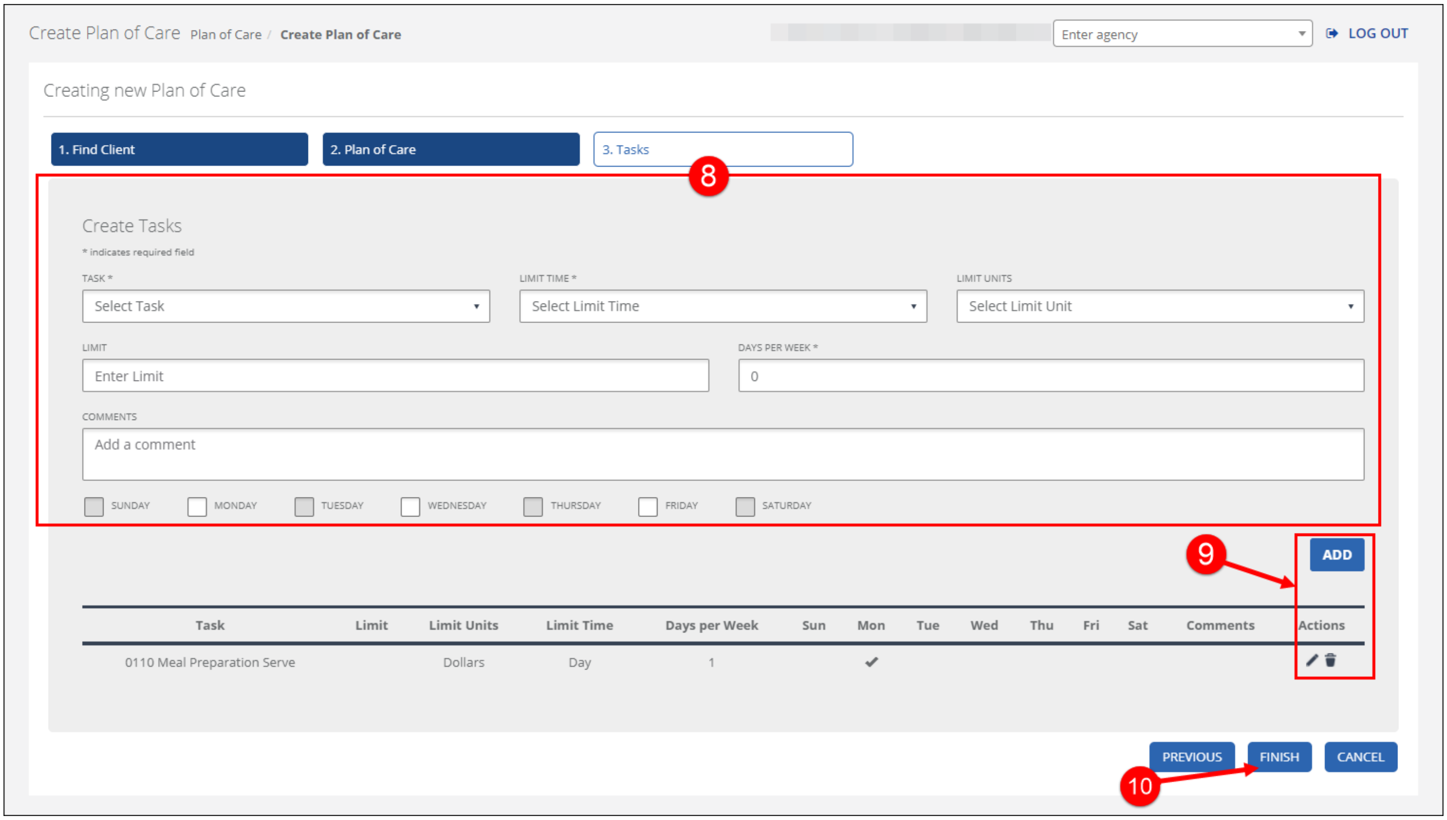


Create Plan of Care: Plan of Care Tab

8. Enter/Select all applicable fields on the Tasks tab.

9. **Add**, **Edit** (), or **Remove** () tasks.
The Plan of Care can be saved with no tasks or limit time entered.

10. Click **FINISH**.



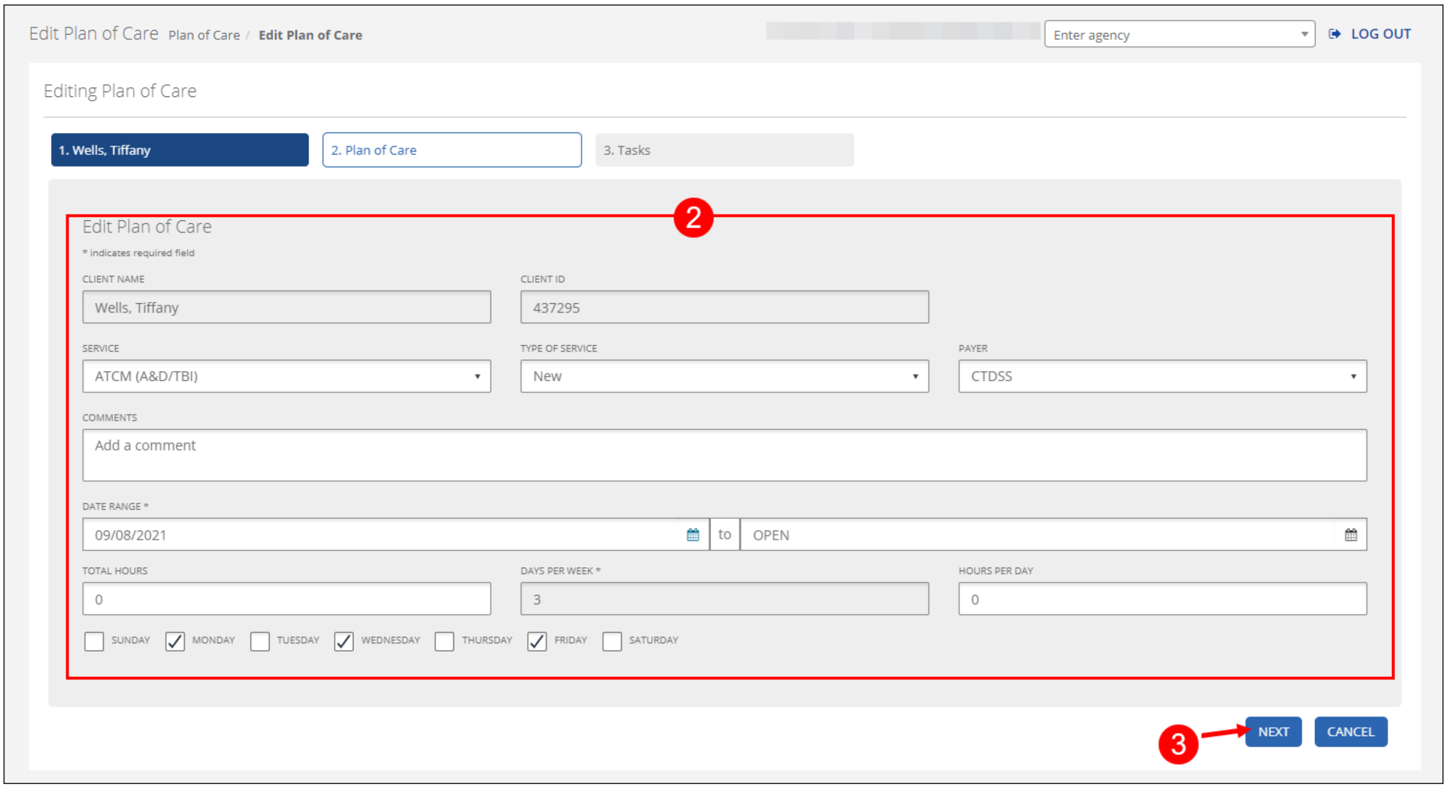
Create Plan of Care: Tasks Tab

Editing a Plan of Care

1. Navigate to the Editing Plan of Care screen.
(**Plan of Care** > Search for the plan of care > Click **EDIT** ( ))

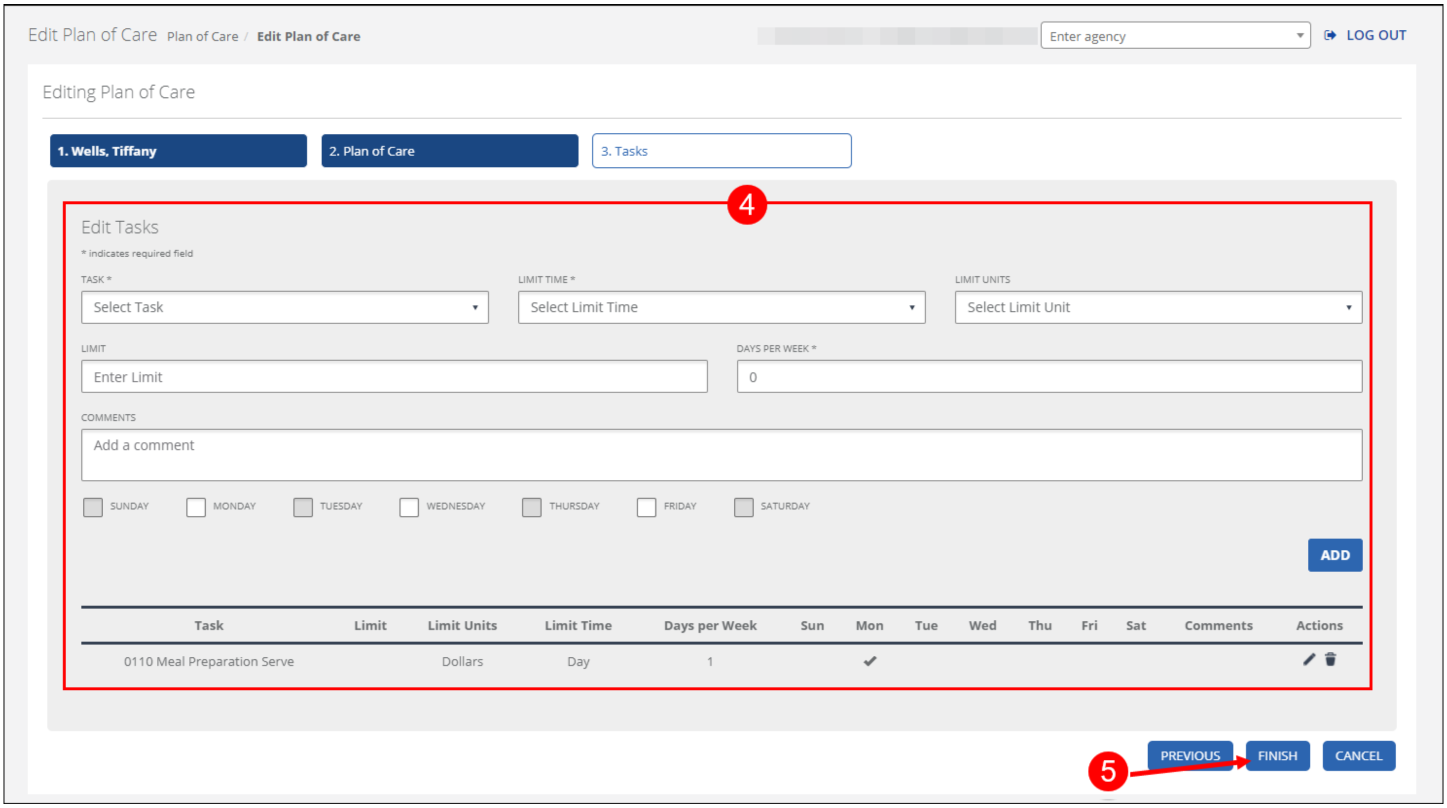
2. Modify the desired fields on the Plan of Care tab.
The **CLIENT NAME** and **CLIENT ID** cannot be changed.

3. Click **NEXT**.



4. **Add**, **Edit** ( ), or **Remove** ( ) tasks.
The plan of care can be saved with no tasks or limit time entered.

5. Click **FINISH**.



Edit Plan of Care Plan of Care / Edit Plan of Care
Enter agency
LOG OUT
Editing Plan of Care
1. Wells, Tiffany
2. Plan of Care
3. Tasks
4
Edit Tasks
* indicates required field
TASK *
Select Task
LIMIT TIME *
Select Limit Time
LIMIT UNITS
Select Limit Unit
LIMIT
Enter Limit
DAYS PER WEEK *
0
COMMENTS
Add a comment
SUNDAY
MONDAY
TUESDAY
WEDNESDAY
THURSDAY
FRIDAY
SATURDAY
ADD
Task
Limit
Limit Units
Limit Time
Days per Week
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Comments
Actions
0110 Meal Preparation Serve
Dollars
Day
1
5
PREVIOUS
FINISH
CANCEL

Appendix A: Exceptions:

Field	Description
Actual Hours more than Scheduled Hours	The calculated amount of time between the visit's call in and call out is more than the scheduled duration of the visit. This exception is resolved by updating the Adjusted In and Adjusted Out fields on the Visit Details screen fields to match the scheduled times. Adjusting Call Times Instructions.
Billing Hours less than Scheduled Hours	The total amount of time billed for the visit is less than amount of time scheduled for the visit. This exception can be resolved by updating the bill hours to match the scheduled hours: Adjusting Bill Hours
Client Eligibility	The service entered for the visit was not included in the client's authorization. This exception is resolved by updating the service for the visit. Changing or Updating Service Instructions.
Client Signature Exception	A written signature for the visit was not provided by the client. This exception only applies to visits performed using Sandata Mobile Connect. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Client Speaker Verification Bypassed (Potentially Remove)	The client did not verify the visit information. (Acknowledge) (TVV and SMC?)
Client Speaker Verification Exception	The client did not provide a voice signature for the visit. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.

Field	Description
Early Out Call	The call out was received before the visit's scheduled end time. This exception is resolved by updating the Adjusted Out time to match the schedule's end time. Adjusting Call Times Instructions.
Employee Replacement	The employee who performed the visit is different from the employee who was originally scheduled to perform the visit. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Employee Speaker Verification Exception	The employee's voice did not match the voice on record. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Extraneous Calls	Additional calls were received between the call in and the call out. Depending on configuration, this exception is resolved by being acknowledged (Acknowledging Exceptions Instructions) or by merging the extraneous calls using the Merge Calls tab of the Visit Details screen (Merge Calls Instructions). If your EVV system does not have the Merge Calls tab, you cannot merge calls.
GPS Distance Exception	The GPS coordinates for the call in or call out of the visit are too far from the client's address, based on a configurable limit. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Invalid Contract / Payer (Third Party Interface Only)	The service selected for the visit was not valid based on payer or program rules. This exception must be resolved in the third party system.

Field	Description
Late In-Call	The call in was received after the scheduled start time of the visit. This exception is resolved by updating the Adjusted In field on the Visit Details screen. Adjusting Call Times Instructions.
Location Required	A location was not entered for the visit. This exception is resolved by updating the Location field on the visit details screen.
Missing Critical Tasks	Required critical tasks were not entered for the visit. This exception is resolved by adding missing tasks. Manually Adding and Removing Tasks Instructions.
Missing Service	A service was not entered during the visit. This exception is resolved by updating the service for the visit. Changing or Updating Service Instructions.
Missing Tasks	Required tasks were not entered for the visit. This exception is resolved by updating the tasks on the Visit Details screen. Changing or Updating Tasks Instructions.
No Show Exception	An employee did not call in for a scheduled visit. This exception is fixed by acknowledging it. Acknowledging Exceptions Instructions.
Pay Hours greater than Maximum Allowed Hours	The total amount of time paid for the visit is more than the maximum payable time allowed by the authorization. This exception is resolved by updating the Pay Hours fields on the Visit Details Screen.

Appendix A: Exceptions:

Field	Description
Payroll Hours less than Scheduled Hours	The payroll hours are less than the visit's scheduled hours. This exception is resolved by updating the Payroll Hours field on the Visit Details screen.
Service Verification Exception	The client did not confirm the selected service. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Short Visit	The length of the visit is less than the total scheduled length of the visit. This exception is resolved by updating the Adjusted In and Adjusted Out fields on the Visit Details screen fields to match the scheduled times.Adjusting Call Times Exceptions.
Task Mileage Exception	The mileage entered for the visit does not match the mileage that was calculated. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Time Entered in Tasks Exceeds Payroll Hours	The total entered time for tasks is greater than the payroll hours for the visit. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Time Entered in Tasks less than Scheduled Hours	The total entered time for tasks is less than the scheduled hours for the visit. Acknowledging Exceptions Instructions.

Field	Description
Unauthorized Service	The employee selected a service for the visit that does not match a service the client is authorized to receive. This exception is resolved by updating the service on the Visit Details screen. Changing or Updating Service Instructions.
Unknown Clients	The client for the visit could not be matched to a known client in the system. This exception is resolved by updating the client on the Visit Details screen. Updating a Client Instructions.
Unknown Employees	The Santrax ID entered on the phone during a TVV visit does not match to a known employee in the system. This exception is resolved by updating the employee on the Visit Details screen. Updating an Employee Instructions.
Unmatched Billing and Payroll Hours	The total amount of hours billed for the visit does not match the visit's total amount of payroll hours. This exception is resolved by updating the Bill hours field on the Visit Details screen. Updating Bill Hours Instructions.
Unmatched Billing and Scheduled Hours	The total amount of time billed does not match the total amount of time scheduled for the visit. (Fix. General tab. Update Field Bill Hours)
Unmatched Client ID/Phone	The Client ID was entered on a TVV call placed from a number not associated with that client. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.

Appendix A: Exceptions:

Field	Description
Unmatched Payroll and Scheduled Hours	The total amount of time paid for the visit does not match the total amount of time scheduled for the visit. (Fix. General tab Payroll Hours field)
Unscheduled Visits	The call-in or call-out that was received for the visit that does not match to a schedule. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Visit Verification Exception	The client did not verify the visit information. This exception is resolved by acknowledging it. Acknowledging Exceptions Instructions.
Visits without Any Calls	No calls were made for a scheduled visit. This exception is resolved by manually creating calls using the Call Log tab of the Visit Details screen. Manually Adding Calls Instructions.
Visits without In-Calls	A call in was not received for the visit. This exception is resolved by manually creating calls using the Call Log tab of the Visit Details screen. Manually Adding Calls Instructions.
Visits without Out-Calls	A call out was not received for the visit. This exception is resolved by manually creating calls using the Call Log tab of the Visit Details screen. Manually Adding Calls Instructions.