



Our Webinar Will Begin Shortly

Note: This session is for Massachusetts Managed Care Entities

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Massachusetts – Managed Care Entity Aggregator Training

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Agenda



- EVV Recap and Current State of EVV in Massachusetts
- EVV Compliance 101
- Sandata Aggregator
- Helpful Resources



EVV Recap & Current State of EVV In Massachusetts



The 21st Century Cures Act

Passed by Congress in December 2016, the 21st Century Cures Act requires that providers of Personal Care Services confirm visits via Electronic Visit Verification (EVV) by January 1, 2021.

The six data elements required to be collected to meet the Cures Act EVV requirement:



Type of Service Performed



Location of the Service



Individual Receiving the Service



Individual Providing the Service



Date of the Service



Time the Service Begins and Ends



Open Model: Provider Choice of EVV Vendor



OR



3rd Party EVV Vendor
(AltEVV Providers)

- Massachusetts is an **open model state** meaning that providers may choose to use the State EVV system or integrate a third-party or an existing system that is capable of transmitting EVV compliant visit data to the State Aggregator
 - **3rd Party System Users (Non-Sandata):**
 - Providers will be responsible for costs associated with their chosen system
 - Providers must ensure their 3rd party system connects to the Sandata data system and meets state requirements
 - Sandata is the **State Aggregator** and collects all visit data, regardless of the EVV system being used



Member, Authorization, and Visit Workflow



- **Step 1: Massachusetts Providers Register for a Sandata Account**
 - Whether Providers will use Sandata EVV system or a 3rd Party System, Providers will need a Sandata Account to store their EVV data
- **Step 2: Add Clients and Employees**
 - **Sandata EVV Providers:** Search for clients in Sandata EVV to pull in the pre-loaded demographic and authorization information from the state into your account. Add your Employees to your Sandata EVV account
 - **AltEVV Providers:** Complete the Client Data Endpoint to pull the pre-loaded demographic and authorization information from the state into your account. Complete the Employee Data Endpoint to add your Employees to your account.
- **Step 3: Employees clock in and clock out of every in-scope service visit**
 - Please review the in-scope services list Here: [Electronic Visit Verification for Agency-based Providers | Mass.gov](https://www.mass.gov/electronic-visit-verification-for-agency-based-providers)
- **Step 4: Visit Review and Confirmation**
 - **Sandata Providers:** Visit Maintenance
 - **3rd Party (AltEVV) Providers:** Visit Import Rejection Resolution

EVV Roles & Responsibilities



Massachusetts EOHHS

- Establish EVV Policies and Procedures
- Monitor and Enforce EVV Compliance
- Policy Support & Technical Assistance

Massachusetts Payers (MCEs)

- Authorize in-scope EVV services
- Monitor and Enforce EVV Compliance

Sandata

- State Aggregator
- Receives client and authorization data from Massachusetts EOHHS
- Technical Customer Care Support

Sandata Providers

- Register for the Massachusetts EVV Program
- Add Clients and Employees to Account
- Train Employees to use Sandata Mobile Connect
- Perform Visit Maintenance
- Review & manage your agency's EVV Compliance
- **Start here:** [Get Ready Checklist for Sandata EVV Providers](#)

3rd Party Providers

- Register for the Massachusetts EVV Program
- Add Clients and Employees to Account
- Ensure your 3rd Party System is integrated with the Sandata Aggregator. 3rd Party Systems must be able to meet the [Technical Specifications](#).
- Train Employees to use the EVV tools provided by your 3rd Party Vendor
- Ensure your 3rd Party Vendor is aware of the visit data that needs to be imported to the Sandata Aggregator
- Review & resolve visit import rejections with the support of your 3rd Party Vendor
- Review & manage your agency's EVV Compliance
- **Start Here:** [Get Ready Checklist for 3rd Party Providers](#)



EVV Compliance 101



What is EVV Compliance?

EVV Compliance:

- Is defined by state policy
- Calculated in Sandata using the EVV Visit data you capture and/or import into your Sandata Account. **All visits for in-scope services are required in Sandata**, regardless of whether they are a fully EVV Compliant visit or not.

EVV Compliance % Calculation:

- Auto-Verified Visits \div Auto-Verified Visits, Manually Verified Visits, and Incomplete Visits = EVV Compliance %

Auto-Verified Visits:

- An Auto-Verified Visit is defined as having the 6 required Cures Act elements captured electronically when an Employee clocks in and clocks out of their visit. An Auto-Verified Visit is not manually entered or edited after the fact by the Provider.



Type of Service Performed



Location of the Service



Individual Receiving the Service



Individual Providing the Service



Date of the Service



Time the Service Begins and Ends



What are Exceptions?

- Exceptions are the reasons a visit will not be compliant
- There are 8 Exceptions in Massachusetts:
 - Unknown Client
 - Unknown Employee
 - Missing Service
 - Missing Location
 - Visits without an In-Call
 - Visits without an Out-Call
 - Visits without Any Calls
 - Missing Payer



To be in a manually verified state, these exceptions must be resolved.

Visits in Auto-Verified and Manually Verified status will be available to match to a submitted Claim.



Visit Statuses



- **Scheduled:** The visit has not yet occurred and has a scheduled start date/time in the future
- **In-Process:** The visit is 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 is less than 24 hours since the call-in was received.
- **Incomplete:** The visit is missing required information. Required information is based on the state-designated configuration. Missing information is indicated on the visit maintenance grid as exceptions (red dots).
- **Verified:** The visit has no exceptions. A visit in this status is eligible to be returned for claims validation
- **Processed:** The visit was returned to the adjudication system during claims validation
- **Omit:** A visit 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.



Sandata Aggregator



Sandata Aggregator



- Stores all EVV data in the state
 - Accepts visit data from disparate systems and normalizes it for reporting purposes to the state and CMS
- Data Access and Visibility:
 - Sandata EVV Providers access their data and reports in their **Sandata Account**
 - AltEVV Providers access their data and reports via the **Aggregator**
 - Data visibility is segmented so only those Providers and MCEs show the data that is applicable to them. This is accomplished via **Access Groups**.
 - Provider Access Groups are restricted to the Provider's Account Number(s)
 - MCE Access Groups are restricted to the Payer's configured initials. Payer initials are associated with every visit. Visits with the Payer's initials are visible in the Aggregator to that Payer.



Visit Review Module



Sandata Aggregator – Visit Review



- **Overview:**
 - Row-level visit data searchable by Provider, Client, or Employee for a specified date range
- **How to Use This Module:**
 - Get a more granular look at the volume of visits and visit statuses per Provider
 - Understand what types of exceptions are being applied to a Provider's Incomplete visits
 - Helpful Tips:
 - Use the 'Filter Visits By' drop down to see the list of visits from a few different perspectives
 - Use the 'Display Options' to see more or different data points for the list of visits



Visit Review

* indicates required field

AGENCY	CLIENT	MEDICAID ID #	EMPLOYEE	EMPLOYEE SSN 000-00-0000
	Enter Client	Enter Medicaid ID #	Enter Employee	Enter Employee SSN
DATE RANGE + MM/DD/YYYY	09/01/2025	to	10/20/2025	
VISIT STATUS	All	FILTER VISITS BY	All Visits	
			All Exceptions	
			All Visits	
			Exception Types	

ROWS PER PAGE: 50

Client Primary Phone Number
 Client Verified
 Do Not Bill
 Employee Contact Phone Number
 Employee ID
 Employee Name
 Group Visit Code
 In/ Out Call Location
 Memo
 Pay Hours
 Payer
 Program

Santrax ID
 Scheduled Hrs
 Scheduled Time In
 Scheduled Time Out
 Service
 Supervisor
 Units
 Visit Date
 Visit Received
 Visit Status

Call Out
 Claims Verification Status
 Client ID
 Client Medicaid ID
 Client Name

10/17/2025 11:00 AM 11:30 AM 00:30 10:11 11:57 01:46 10:11 AM 11:57 AM 01:46 Verified 1



Sandata Aggregator – Visit Review



Sandata Aggregator

Visit Review

Account: jvadmin51885@sodata.com [LOG OUT](#)

* indicates required field

AGENCY: PROGRAM AREA AGENCY - 72... CLIENT: Enter Client MEDICAID ID #: Enter Medicaid ID # EMPLOYEE: Enter Employee EMPLOYEE SSN 000-00-0000

DATE RANGE * MM/DD/YYYY: 09/01/2025 to 10/20/2025 VISIT STATUS: All FILTER VISITS BY: All Visits

Show Advanced Filter Options ▾

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

[EXPORT ▾](#)

ROWS PER PAGE: 50 Show Display Options ▾

Showing 1 to 30 of 30 entries

Client Name	Employee Name	Service	Visit Date	Scheduled Time In	Scheduled Time Out	Scheduled Hrs	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Units
Services of HH Aide in Home Health Setting			10/20/2025	12:00 PM	12:30 PM	00:30	●	●						Incomplete	<input type="checkbox"/>	0
Direct Skilled Nursing Services of an RN			10/17/2025	01:00 PM	01:30 PM	00:30	05:02 PM	05:21 PM	00:19	05:02 PM	05:21 PM		00:19	Verified	<input type="checkbox"/>	1
Services of HH Aide in Home Health Setting			10/17/2025	12:00 PM	12:30 PM	00:30	12:51 PM	01:35 PM	00:44	12:51 PM	01:35 PM		00:44	Verified	<input type="checkbox"/>	3
Telehealth-Direct Skilled Nursing Services of an LPN			10/17/2025	11:00 AM	11:30 AM	00:30	10:11 AM	11:57 AM	01:46	10:11 AM	11:57 AM		01:46	Verified	<input type="checkbox"/>	1
Complex Care Training and Oversight by an RN			10/17/2025	10:30 AM	11:00 AM	00:30	●	●					00:31	Incomplete	<input type="checkbox"/>	0
HH - HH Aide ADL Only Support in Home Health Setting			10/17/2025	10:15 AM	10:45 AM	00:30	09:29 AM	10:00 AM	00:31	09:29 AM	10:00 AM		00:31	Verified	<input type="checkbox"/>	2



Reports Module



Sandata Aggregator – Reports



- **Overview:**
 - Generate various Reports for single or multiple Providers, Programs, and Services
 - [Aggregator Reports Listing](#)
- **How to Use This Module:**
 - View and download reports that contain valuable Provider, Client, Employee, and Visit data
 - See an individual Provider's EVV Compliance (Auto-Verification Summary Report – All Visits)
 - Helpful Tips:
 - If you belong to multiple Access Groups, you'll need to select 'Corporation' first
 - Review the linked Aggregator Reports Listing above to know which Reports contain what pieces of information
 - Pay attention to your filters when running a report to ensure you've selected the appropriate date range, Provider, Payer, Program, Service Code, etc.



Select Report

CORPORATION

Select Access Group

REPORT TYPE

Select Report Type

REPORT NAME

Select Report Name

Select Report

CORPORATION

MA Aggregator

REPORT TYPE

Date Range Reports

REPORT NAME

Auto Verification Report Summary - All Visits

Select Timeframe

* indicates required field

FROM DATE * MM/DD/YYYY

10/06/2025



TO DATE * MM/DD/YYYY

10/20/2025



FROM TIME * HH:MM AM/PM

12:00 AM



TO TIME * HH:MM AM/PM

11:59 PM



Note: The range for this report cannot exceed 31 days.

Select Parameters

ACCOUNT

All selected (68)

PROGRAM

All selected (18)



CONTRACT

All selected (3484)

SERVICE

All selected (28)

CLEAR

RUN REPORT



Authorizations Module



Sandata Aggregator – Authorizations



- Overview:**
 - Check on the status of Authorizations assigned to your Providers
- How to Use This Module:**
 - View the list of Authorizations from various perspectives (e.g. Active vs. Expired Authorizations, etc.)
 - Helpful Tips: Use the 'Show Advanced Filter Options' to see expanded filter abilities

DATE RANGE * MM/DD/YYYY
10/01/2024 to 10/20/2025

CLIENT ID #

CLIENT LAST NAME

AUTHORIZATION STATUS

All

Show Advanced Filter Options

ROWS PER PAGE: 20

Showing 1 to 20 of 1476 entries

Period Limited by Selected Date Range																
Status	ID	First Name	Last Name	Supervisor	Payer	Program	Service	Authorization Reference Number	From Date	To Date	Authorization Type	Authorization Limit Type	Authorized For	Verified	Diff	Pending Visits
Exceeded	104192			MAELD	Choices		Services of HH Aide in Home Health Setting	AMP20240712T144350609	10/01/2024	10/20/2025	Unit	None	1	-1	1	
OK	253889			MAELD	Choices		Services of HH Aide in Home Health Setting	AMP20240712T175028612	10/01/2024	10/20/2025	Unit	None	0	0	0	



Security Module



Sandata Aggregator – Security



- **Overview:**
 - Manage access & security to the Aggregator through your Access Group
- **How to Use This Module:**
 - [Add or deactivate users](#)
 - Update user roles
 - Change Password

Sandata Aggregator

Security / Manage Users

Account: jvadmin51885@sodata.com [LOG OUT](#)

Select a User

[CREATE USER](#)

USERNAME LAST NAME FIRST NAME STATUS

Enter Username Enter Last Name Enter First Name Active

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

ROWS PER PAGE: 20

Showing 1 to 20 of 45 entries

Username Last Name First Name Case Manager Status Actions

Username	Last Name	First Name	Case Manager	Status	Actions
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /
...	N	ACTIVE	/ /

Manage Users

Manage User Roles

Change Password

Online Manual

Navigation: < < 1 2 3 > >>



EVV Compliance

Auto-Verification Summary Report - All Visits



Auto-Verification Summary Report – All Visits



- **Overview:**
 - Per Provider, Per Payer, Per Program EVV Compliance Report
- **How to Use This Module:**
 - **Reports Module**
 - **Select Corporation (Payer Initials)**
 - **Report Type:** Date Range Reports
 - **Report Name:** Auto Verification Report Summary – All Visits

Select Timeframe

* indicates required field

FROM DATE * MM/DD/YYYY
09/01/2025

TO DATE * MM/DD/YYYY
09/30/2025

FROM TIME * HH:MM AM/PM
12:00 AM

TO TIME * HH:MM AM/PM
11:59 PM

Note: The range for this report cannot exceed 31 days.

Select Parameters

• **Account = Provider**  ACCOUNT
All selected (1)

• **Contract = Payer**  CONTRACT
All selected (52)

PROGRAM
All selected (18)

SERVICE
All selected (28)



Auto-Verification Summary Report – All Visits



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)
Total Visits	the number of Auto-Verified, Verified, and Incomplete visits for the report parameters selected
Auto Visits	the number of Auto-Verified visits that do not have any manual updates applied.
% Auto Visits	the percentage of visits that did not have any manual updates applied, often referred to as EVV Compliance %. (Auto-verified visits ÷ Total visits)
Manual Visits	the number of Verified visits that have manual updates applied
% Manual Visits	the percentage of Verified visits that have manual updates applied (Manually verified visits ÷ Total visits)
In-Complete Visits	the number of Incomplete visits that are missing necessary information (e.g. call in or call out times, missing service, missing location, etc.)
% In-Complete Visits	the percentage of Incomplete visits that are missing necessary information (Incomplete visits ÷ Total Visits)
Omit Visits	the number of unverified visits flagged for omission
Manual Calls	the number of manually created calls
% Manual Calls	the percentage of manually created calls
Manual Edits	the number of visits with manual edits
% Manual Edits	the percentage of visits with manual edits
Adj. Visits	the number of visits with adjusted times
% Adj. Visits	the percentage of visits with adjusted times
Verified Visits	the number of verified visits
% 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
% Non-Verified Visits	the percentage of visits that have been completed and are scheduled or are still pending manual updates
Grand Totals	the grand totals under each type of visit



Auto-Verification Summary Report – All Visits



1 Auto-Verified Visit ÷ 10 Total Visits = 10% EVV Compliance

AUTO VERIFICATION SUMMARY – ALL VISITS

Report Parameters
Account Aggregator
Per: 8/1/2025 - 8/31/2025 11:59:59 PM
Corporation

			VISITS / TOTAL VISITS					WITH MANUAL UPDATES					VERIFIED VS NON-VERIFIED							
ACCOUNT	ACCOUNT NAME	PROVIDER ID	TOTAL	AUTO	%	MANUAL	%	IN-COMPLETE	%	OMIT	MANUAL CALLS	%	MANUAL EDITS	%	ADJ. VISITS	%	VERIFIED VISITS	%	NON-VERIFIED VISITS	%
			10	1	10.0	3	30.0	6	60.0	0	3	100	0	0	0	0	4	40.0	6	60.0
			15	3	20.0	3	20.0	9	60.0	0	3	100	1	33.3	0	0	6	40.0	9	60.0
			5	1	20.0	2	40.0	2	40.0	0	2	100	0	0	0	0	3	60.0	2	40.0
Grand Totals:			5	8	17	0	8	1	0	0	13	100	1	7.7	0	0	13	100	1	7.7
**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.																				



EVV Compliance – Helpful Information



- EVV Compliance % is calculated at a **point in time**. If you generate an EVV Compliance Report on 10/01/25 for 9/01/25 – 9/20/25 date range. Then, run that same report for the same date range on 10/20/25, the EVV Compliance % may be different
- Providers perform Visit Maintenance (Sandata EVV) and Visit Import (AltEVV) at varied intervals
- Best practice is to review EVV Compliance 2+ weeks after the intended monitoring date range



Questions?



Thank You!