



# Sandata

Get more right from the start

VT HH Expansion Kick-Off  
July 28, 2022

# Kick-Off Agenda

- ▶ Introductions
- ▶ Program Goals & Scope
- ▶ Implementation Overview
- ▶ Next Steps

# Sandata Introductions

Team Member	Title	Project Role
Brian Lawson	VP, Sales Solution Design	Contract Manager
John Kalivas	VP, Solutions Engineering	Technical Account Manager
Antoinette Oliver	Implementation Project Manager	Project Manager
Aimee Bickers	Sr. Director, Professional Services	Project Escalation
Carey Sowle	SVP, Professional Services	Project Escalation
Narvell Neves	TN Customer Services Manager	Customer Success
Sean Dunham	Product Director Payer EVV Market	Product
Chad Carr	Training Workstream Lead	Training
Marie DiCola	Director Customer Care	Customer Support
Jason Feder	Lead Director, Payer Program Testing	UAT/SIT
Joe Taffurelli	A/R Manager	Finance and Accounting

# Client Introductions

Team Member	Project Role/Title
Patrick Claussen	Gainwell Account Manager
Scott Friedman	Gainwell Project Manager
Holly Lorr	State Project Manager
Susan Coburn	Administrator- Health Care Policy/Business Lead
Lori Collins	Administrative Services Director/Project Leadership
Joe Liscinsky	Health Enterprise Director/Project Leadership
Kelly Gordon	AHS Projects & Operations Director/Project Leadership
Garth Walker	OCM- Practitioner/Communications & Training Lead
Sean Judge	Consultant-ADS/Enterprise Architect
Michael Gordon	Consultant-ADS/IT Lead
Bill Clark	Compliance Director/Project Leadership
Frank Puleo	Director- Special Investigations Unit (SIU)/Stakeholder
Mark Reaves	DAIL EVV Lead/Stakeholder
Curtis White	Consultant /IV &V Lead
Christine Ryan	DVHA Administration Specialist/Clinical SME

# Client Introductions

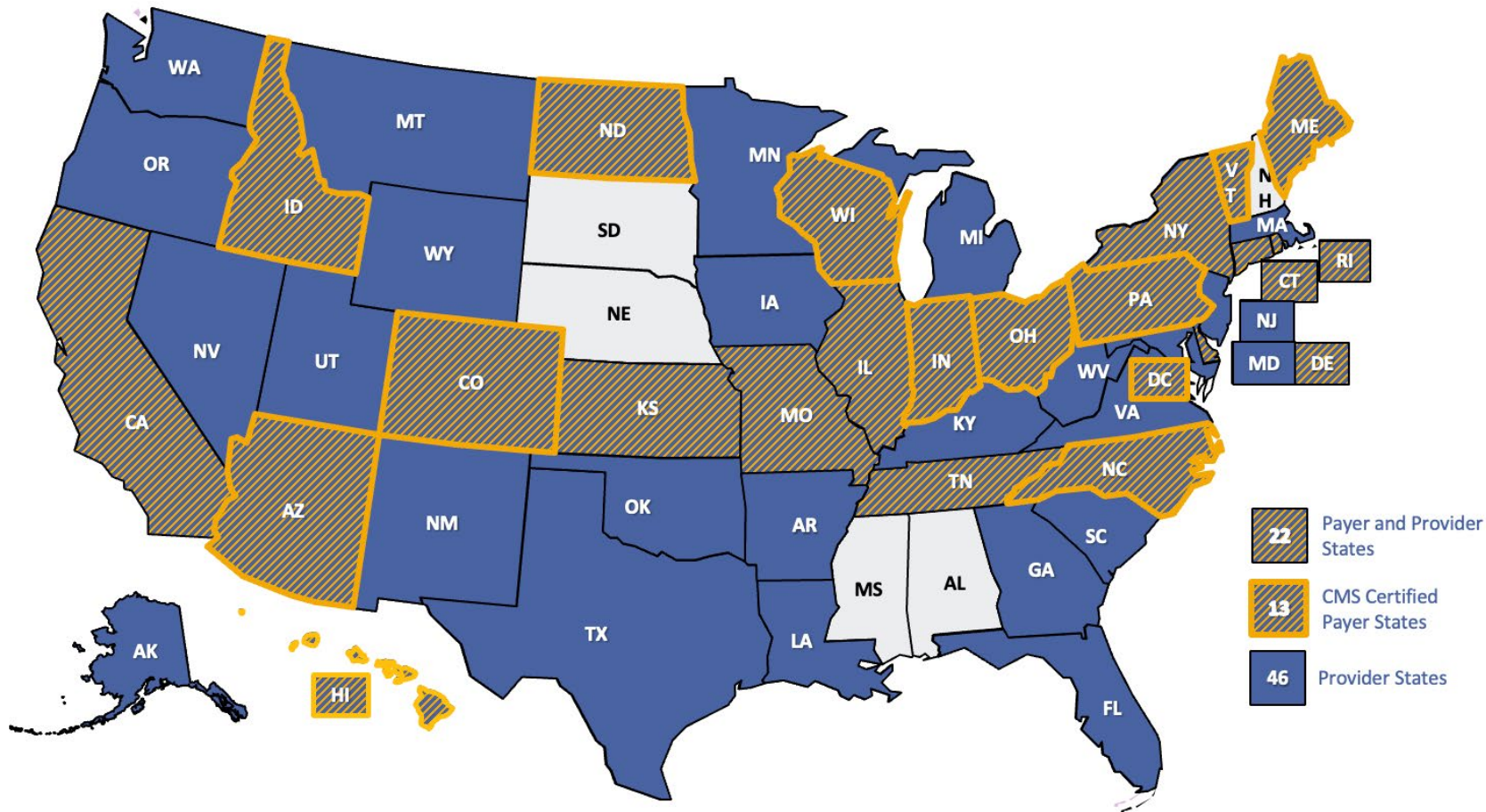
Team Member	Project Role/Title
Kristy Allard	Nurse Case Manager Specialist/Clinical SME
Deidra Jarvis	Provider Relations Specialist/Member and Provider Services- SME
Tonya Corrigan	Medicaid Operations Administrator/Reimbursement SME



VT (HH)  
Program Goals & Scope

# Vermont EVV Program Objectives

- ▶ Comply with 21st Century Cures Act
- ▶ Generate cost savings from the prevention of fraud, waste, and abuse
- ▶ Reduce administrative burdens associated with hard copy timesheet processing



## Experience Matters

- ▶ 40+ years of experience delivering technology solutions to the home care market, and over 17 years of experience delivering solutions to the State Medicaid market.
- ▶ The most experienced EVV vendor with 22 state programs.
- ▶ Best-in-class technology solution and key contributor to the 21st Century Cures Act.
- ▶ **Leader in EVV innovation, including:**
  - Open EVV Model—currently have 18 Open model state programs with 15,000+ integrations with 240+ vendors.
  - CMS Certification—13 fully certified states, 2 awaiting CMS final approval.



## EXPERIENCE

- ▶ The most experienced EVV vendor with 22 state programs
- ▶ Over 110 Medicaid Programs
- ▶ 50 managed care orgs
- ▶ Over 20,000 providers
- ▶ 2.5M patients
- ▶ 150M annual visits captured
- ▶ No failed implementations

## PEOPLE

- ▶ Over 320 employees, all committed to HCBS solutions
- ▶ Subject Matter Experts and leaders in the home care industry
- ▶ Advised on the creation of the OBC CMS Certification process for EVV programs

## TECHNOLOGY

- ▶ EVV Software as a Service
- ▶ Configurable COTS Solution
- ▶ Flexible solutions ensure:
  - ▶ Care is captured regardless of setting or geographic challenges
  - ▶ Providers can use the system they are most comfortable with
  - ▶ State gets increased adoption and compliance; driving quality and savings

# VT (HHCS) Scope & Objectives - Services

## Services

- ▶ Physical Therapy – G0151
- ▶ Occupational Therapy – G0152
- ▶ Speech Therapy – G0153
- ▶ Skilled Nursing (RN) – G0299
- ▶ Skilled Nursing (LPN) – G0300
- ▶ Skilled Nursing SVCS, Visit Charge (RN) – G0299
- ▶ Skilled Nursing SVCS, Visit Charge (LPN) – G0300
- ▶ Home Health Aide – G0156

## Program Size

- Providers – 13
- ▶ All Existing PCS Providers
  - ▶ All Using Alt-EVV
  - ▶ Vendors should be the same
- Members – 665

## Data Integration

- ▶ Members come from Alt-EVV vendors
- ▶ Third-Party EVV
- ▶ Data Warehouse Extract

## Professional Services

- ▶ ~3-Month Timeline
- ▶ Communication/Outreach for Alt-EVV Vendors
- ▶ No Training / Materials
- ▶ Alternate EVV Support
- ▶ UAT / SIT
- ▶ Tier 1/2/3



# Implementation Overview

# Key Project Roles

- ▶ The Project Manager (PM) leads the project, coordinates the resources, manages the schedule, scope & budget, and is the primary point of contact for project implementation.
- ▶ Technical Account Managers (TAM) provide the technical support of the payer program related to Change Request definition, technical program documentation and communication, and solution guidance.
- ▶ The Customer Success Manager (CSM) is the primary point of contact for the program and main escalation contact for support related issues.
  - ▶ The CSM focuses on operational program success, goals (account plan), benchmarks, key measurements, action plans and tactics to improve key measurements, and the feedback loop within the organization.



# Implementation

## Tasks:

- Work through details of the project scope and get them codified
- Identify resources for workstream collaboration
- Facilitate communications between the organizations
- Present business rules discussions and capture decisions on configurations

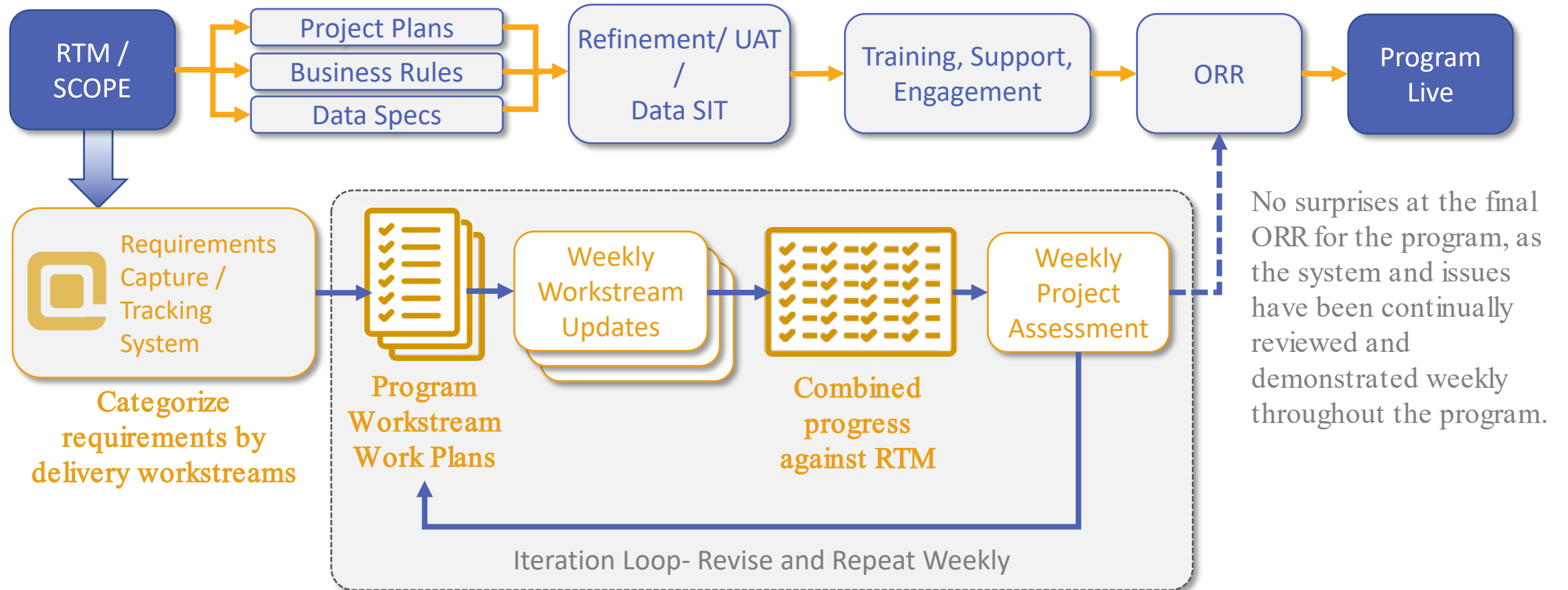
## Goals:

- Successful program launch on schedule
- Ensure workstreams are making timely decisions and creating necessary deliverables
- Maintain project timeline, identify and mitigate project risks

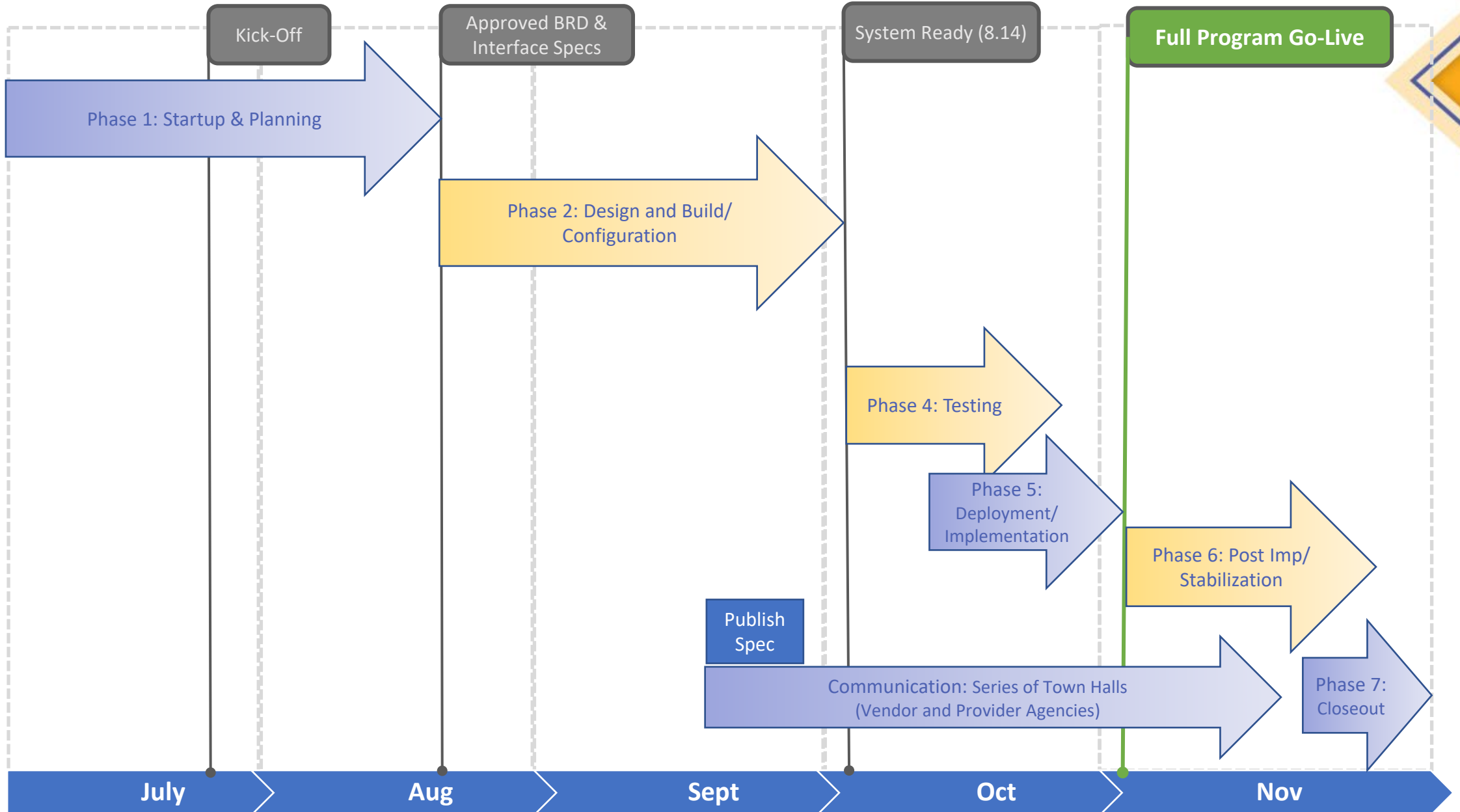
## Deliverables:

- Project Schedule
- Project Updates, Agendas, Minutes
- Issue Log & Risk Register Updates
- Requirements Traceability Matrix
- The EVV Program - On time, On budget

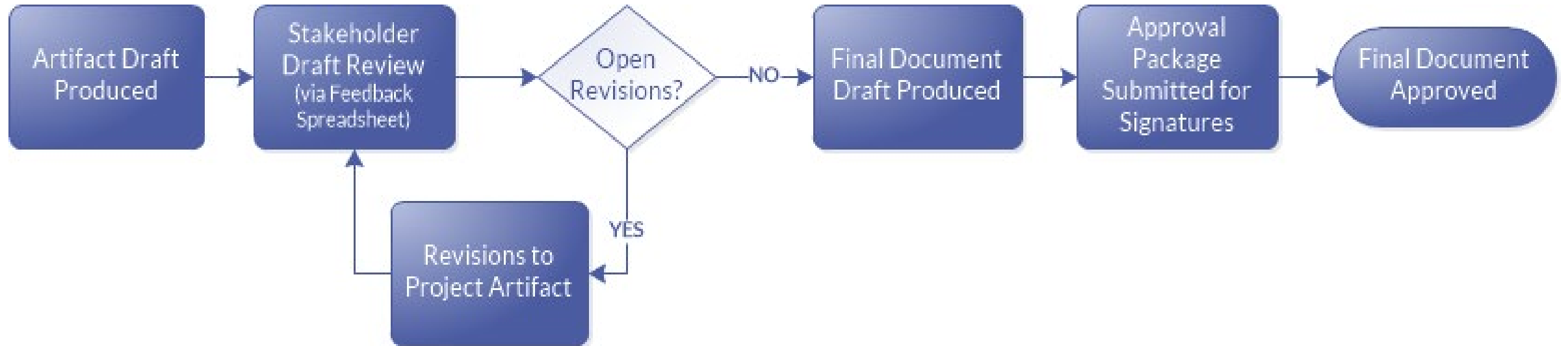
# Implementation Operational Monitoring



# Vermont Home Health Expansion



# Deliverable Review Process





# Project Communication Methods

## MEETINGS & PRESENTATIONS

- ▶ Implementation Kick-Off
- ▶ Weekly Project Operation Meetings
- ▶ Business Rules/ Technical Design Sessions
- ▶ Alt EVV Town Halls
- ▶ Operational Readiness Review

## DELIVERABLES/ ARTIFACTS

- ▶ Technical WSR (weekly Status Report)
  - ▶ Issue
  - ▶ Defects
  - ▶ Milestone/Deliverables
- ▶ Requirements Traceability Matrix (RTM)
- ▶ Shared Document Repository

## EMAIL CORRESPONDENCE

# Escalation Point of Contacts

- ▶ Project Manager, Antoinette Oliver – [antoinette.oliver@sandata.com](mailto:antoinette.oliver@sandata.com)
- ▶ Sr. Director, Professional Services, Aimee Bickers - [aimeeb@sandata.com](mailto:aimeeb@sandata.com)
- ▶ SVP, Professional Services, Carey Sowle - [CSowle@sandata.com](mailto:CSowle@sandata.com)

# Critical Success Factors



Planning & Schedule Maintenance



Open Communication/ Transparency



Clearly Defined Scope & Expectations



Issue & Risk Management



Timely Reviews & Approval



# Solution Overview

# Solution Design

## Tasks:

- Business Rules Workbook
- Policy Alignment
- Review Current Program Setup
- Review Program Definition
- Review Reporting

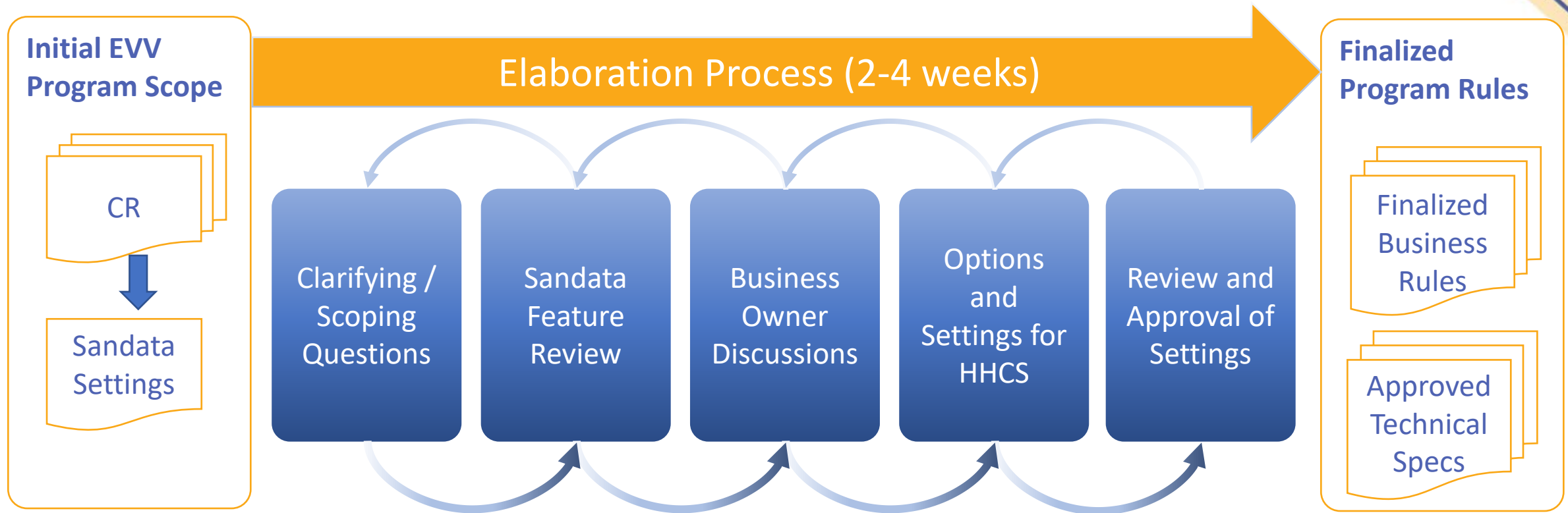
## Goals:

- Support detailed questions during business rules / program definition
- Ensure policies align to program definitions
- Approve EVV configuration choices

## Deliverables:

- Business Rules Review
- Validated data interfaces
- Defined program service codes
- Finalized system configurations

# Business Rules / Configuration: Elaboration



We will work together to review and understand the current program, define Home Health changes and proceeding into detailed updates. This approach helps ensure that we configure the Sandata solution to meet your requirements.

# Data Interfaces

## Tasks

- Definition & Delivery: Alternate EVV
- Definition & Delivery: Data warehouse export from the EVV system

## Goals:

- Support detailed questions during business rules/ program definition
- Define data feed and interface updates to and from EVV system
- Implement the EVV configuration choices (additional services)

## Deliverables:

- Business Rules Review
- Technical design documentation and reference materials
- Validated data interfaces

# Business Readiness

## Tasks

- Feature and configuration validation points
- Testing schedule and test case review timeline
- Test execution and results review

## Goals:

- Sandata performs standard UAT
- Ensure program policies & configurations are in place
- Ensure stakeholder feedback is captured

## Deliverables:

- Testing Schedule
- UAT Summary document, with full test results
- Provide Final Business Rules and Configuration Table output for validation (UAT/Production)



# Provider Support

## Tasks

- Provide live support via existing established channels: phone, chat, email, web forms

## Goals:

- Provide prompt and accurate support focusing on accuracy and prompt resolution of all customer driven issues
- Track and trend top ticket drivers and provide training and resources to internal staff
- Ensure staffing is adequate to meet volume

# Kick-Off Wrap-Up

- ▶ Questions / Responses
- ▶ Next Steps
  - ▶ Business Rules and Technical Design Sessions
    - ▶ First is scheduled for August 5, 2022 at 2:00 pm ET
  - ▶ Establish Cadence for Upcoming Workstream Meetings

THANK YOU FOR YOUR PARTICIPATION  
TODAY!