VT-DVHA Open EVV – EVV Addendum v1.6

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Addendum to OpenEVV - EVV System

Specification v7.4

Version Update

Name	Title	Changes	Date
Pamela Brooks	Product Management	Initial Draft	08.21.2019
T. Nyberg	Payer Implementations	Revision draft based on first presentation with VT-DVHA, DXC, ARIS (CDS Fiscal), and Annkissam (ARIS software vendor).	09.03.2019
Pamela Brooks	Product Management	Revised drafted based on second presentation with VT-DVHA, DXC, ARIS (CDS Fiscal), and Annkissam (ARIS software vendor). Added Designee section.	09.18.2019
Pamela Brooks	Product Management	Annkissam's decision on Delivery Frequency; Real-Time.	09.23.2019
Pamela Brooks	Product Management	Updated service codes; updated mapped service code to service description (in RED)	10.17.2019
Pamela Brooks	Product Management	EmployeeCustomID1 updated to include Employee ID and is now a required field	10.25.2019
Pamela Brooks	Product Management	Updated ClientID and EmployeePIN values throughout	12.19.2019
Pamela Brooks	Product Management	Updated ClientID in Visits section; removed language re batch file transmission	01.07.2020
Pamela Brooks	Product Management	Updated Exception Table / Exception IDs	01.22.2020
Pamela Brooks	Product Management	v1.6: Updated Appendix 2 with revised service codes and modifiers; updated XRefStartDate and XRefEndDate data type and format; updated XRefStartDate to be a required field	08.21.2020

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1 Overview

The OpenEVV-EVV specification is intended to document the requirements for using the Sandata EVV Interface (part of the Open EVV Series of interfaces) for sending clients, employees, schedules and client employee xref, and returning completed visit information to a 3rd party agency management, scheduling or fiscal management system. Sandata supports receiving data via RESTful services with JSON formatting.

The Sandata Open EVV interface allows users/vendors to upload clients, employees, schedules, and client service xref from any 3rd party Agency Management system to Sandata EVV in JSON format. Once uploaded, all data is applied to the Sandata EVV database and after visit information is collected and processed, users can download the completed visit data.

This addendum is intended to document any additional required attributes and the attributes for the specification that have values specific for VT-DVHA pertaining to the OpenEVV-EVV API.

1.1 Intended Audience

The intended audience of this document is:
- Project Management and Technical teams at Sandata.
- Project Management and Technical teams at VT-DVHA who will be implementing this interface.

1.2 Open-EVV EVV API Transmission Guidelines (Inbound- customer to Sandata)

- File Format: JSON
- Headers: Required using the "Column Name" below
- File Delivery: via RESTful API
- File Scope: Incremental, daily

2 Data File Layout

See below for a description of fields and segments supported by the API. As part of the implementation process, required fields may be adjusted and the available fields may be modified based on the program specifics.

None of the segments defined below are required unless explicitly stated. Where noted, certain segments should not be included unless relevant supporting data is also included. The list of segments provided may vary by implementation.

The account identification element will be required as part of the header information provided for all three types of transmissions. This information will be compared to the connection being used within the interface to ensure that the transmission is appropriate. If this match cannot be validated, the transmission will be rejected. Sample requests will be provided prior to implementation demonstrating the usage of this header.

2.1 Account Identification

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	This value will be assigned by the Sandata systems for ARIS. ARIS will be assigned one value for the pre-production UAT/SIT environment where testing will occur, and a separate Account number for the production environment for ongoing deliveries.

2.2 Client

The following is the information relative to the client's receiving service from the agency.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	Sandata-supplied ID # specific to ARIS-unique values provided for use in the testing or production environments.
2	ClientID	This must be all digits. The client id is the	10	String	Yes	Format: ###### (6 numeric)

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
		unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system telephony, MVV, etc.) system for multi-client cases and when using the FVVD.				Note: this is the consumer P value, with the "P" stripped prior to receipt by Sandata
3	ClientLastName	Client's Last Name.	30	String	Yes	LIVE DATA
4	ClientFirstName	Client's First Name.	30	String	Yes	LIVE DATA
5	ClientMiddleName	Client's Middle Initial. May be required if needed for billing. Note that some systems may only use the first letter as the initial.	30	String	Conditional	LIVE DATA
6	MissingMedicaidID	Indicator that a patient is a newborn or otherwise lacks a Medicaid ID for this customer program. If the value provided is 'True', then the ClientMedicaidID will be ignored and will be considered valid and loaded as NULL. Otherwise, the ClientMedicaidID field is required, and the record will reject if that Medicaid ID is not supplied. Valid Values: True | False.	5	String	Optional	Supply as **True** for any 'General Funds' or 'Moderate Needs' clients that do not have assigned Medicaid IDs, and **False** for all other clients that do have assigned Medicaid ID values.
7	ClientEmailAddress	Email address for the client. This value is required for each client record where that client is expected to use the Sandata EVV Member Portal. Each client must have their own unique email address, and two clients should not share a common email address value. Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address. Sandata validates for .com, .net and .org.	50	String	Conditional	LIVE DATA To be supplied for all clients in order to grant them access to the Sandata EVV CDS employer portal. Any client records that do not have this field will still be created in the EVV system, but will not receive portal credentials. Format: xxx@xxx.xxx
8	ClientSuffix	Client Suffix (e.g. Sr. Jr. III, IV, V (no special characters).	4	String	Optional	LIVE DATA
9	ClientSSN	Client's social security number. If the field is left empty, RecipientIDCustom2 must be populated. Not required if RecipientIDCustom2 is sent. Numbers only, no dashes and leading zeros must be included.	9	String	Conditional	DO NOT PROVIDE (Per VT program rules, the SSN of clients will not be used or tracked in the EVV system)

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
		May be required if needed for billing. Format #########				
Client Identifiers						
10	ClientMedicaidID	Unique ID provided by the State Medicaid program to the client.	64	String	Yes*	VT state Medicaid ID value Format: 1-9 digit numeric

No leading zeros- will be treated as an integer in the downstream systems.

(This will be null for members without Medicaid ID's in the General & moderate use programs) |
| 11 | RecipientIDCustom1 | Additional Client User - Defined ID. Commonly used to customize the built-in client ID within the system. If the billing is in scope, this field will identify the correct claim with the correct patient. | 24 | String | Optional | Consumer P Value Format: P###### (1 alpha + 6 numeric)

(Internal Sandata Note: This value should map to Sandata ClientCustomID) |
| 12 | RecipientIDCustom2 | Additional Client User-Defined ID. Commonly used to store client's ID from another system. This value is used to match the client to an existing record during import. | 24 | String | Conditional | Employer E Value Format: E###### (1 alpha + 6 numeric)

Supply this value when the client acts as their own employer, otherwise leave blank.

(Internal Sandata Note: This value should map to Sandata ClientOtherID) |
| 13 | CaseManager | Payer Level Case Managers are individuals who coordinate all aspects of the care of individual patients. If the case manager will be logging onto the EVV system, please provide the email address in this field. | 25 | String | Optional | DO NOT PROVIDE

(Case Manager alerting and notifications are not in scope for this EVV program.) |
| 14 | Coordinator | The staff member assigned to the client in a specific agency as the coordinator for an employee. | 3 | String | Optional | DO NOT PROVIDE

(Coordinator alerting and notifications require the Sandata EVV Scheduling module, and are not in scope for this EVV program.) |

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
15	ClientMedicalRecordNumber	The medical record number assigned to the client.	12	String	Optional	DO NOT PROVIDE
16	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	Optional	DO NOT PROVIDE
Client Demographics						
17	ClientGender	Client's gender. Valid Values: O = Unknown or other; M = Male, F = Female	1	String	Optional	DO NOT PROVIDE
18	ClientBirthDate	Client's date of birth. Required for billing. FORMAT: YYYY-MM-DD	10	Date	Optional	DO NOT PROVIDE
19	ClientMaritalStatus	Client's marital status. Valid Values: M = Married, S = Single, W = Widowed, O = Other	1	String	Optional	DO NOT PROVIDE
20	ClientLanguage	Client's language. The list of acceptable values will be determined during implementation.	32	String	Optional	DO NOT PROVIDE
21	DischargeDate	Date that the client was last discharged from the hospital. FORMAT: YYYY-MM-DD	10	Date	Optional	DO NOT PROVIDE
22	ClientTimeZone	Client's primary time zone. Depending on the program, this value may be defaulted or automatically calculated. Please see the appendix for acceptable values.	64	String	Yes	This should be 'US/Eastern' for all clients in the VT EVV program. See Appendix 5 for valid time zone values
23	ClientPriority	Allows designation of a client's priority. Generally used to designate clients whose service is critical.	2	String	Optional	DO NOT PROVIDE
24	Team	Team, if applicable.	4	String	Optional	DO NOT PROVIDE
25	Branch	Used to identify a branch location within a given agency.	2	String	Optional	DO NOT PROVIDE
26	Borough	Primarily used for New York City agencies.	1	String	Optional	DO NOT PROVIDE
27	Area	Area code for the client. NOTE this is not area code related to a phone number.	2	String	Optional	DO NOT PROVIDE
Client Billing & Payer Information **DO NOT PROVIDE**- (Required only when Sandata EVV Billing Module is used for the EVV program)						
28	ClientAdTypeID	User defined ID representing ID for Admission Type / payer.	6	String	Optional	DO NOT PROVIDE
29	ClientPrimaryDiagnosisCode	The client's primary diagnosis code in ICD-10 format.	10	String	Optional	DO NOT PROVIDE
30	BillRate	Rate for billing. Can have values like 5.043 or 1.23 and should not exceed 5 characters. Decimal point is included in the length.	6	String	Optional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
31	CaseNumber	Case number sent as part of the schedule record. Special use.	9	String	Optional	DO NOT PROVIDE
32	CaseSequence	Case sequence. Special use.	4	String	Optional	DO NOT PROVIDE
33	MobileDevice	Value in this field determines if the client requires a mobile device to be supplied by the payer/program. Special use only.	1	String	Optional	DO NOT PROVIDE
34	Status	Status of a client. To delete a record, set to D or leave empty for an insert or update.	1	String	Optional	DO NOT PROVIDE
Client Primary Address (at least one address must be provided for the client if mobile devices are to be used. Additional addresses can be provided.)						
35	ClientAddressLine1	Street Address Line 1 associated with this address. PO Box may not be acceptable for Billing and PO Box will not function correctly for MVV.	30	String	Yes	LIVE DATA
36	ClientAddressLine2	Street address line 2 associated with this address.	30	String	Optional	LIVE DATA
37	ClientCity	City associated with this address.	30	String	Yes	LIVE DATA
38	ClientState	State associated with this address. Format: 2 char standard state abbreviation	2	String	Yes	LIVE DATA
39	ClientZip	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #####-####. Format Rules: This is the full nine digits of the zip code for a business mailing zip code. If the +4 cannot be provided, please send '0000'.	10	String	Yes	LIVE DATA (align to formatting rules)
40	ClientAddressType	Values: Home, Business, Other. Note that multiple of the same type can be provided. Default to Other if not available.	12	String	Yes	Home| Business | Other
Client Contact / Emergency Contact / Responsible Party Information **DO NOT PROVIDE** (Advised only when Sandata systems are used as the primary management tool for clients)						
41	ContactLastName	Client contact last name. Entered by provider agency.	30	String	Optional	DO NOT PROVIDE
42	ContactFirstName	Client contact first name. Entered by provider agency.	30	String	Optional	DO NOT PROVIDE
43	ContactRelationshipToClient	Emergency contact's relationship to the client.	20	String	Optional	DO NOT PROVIDE
44	ContactPhoneType	Client contact's phone type.	12	String	Optional	DO NOT PROVIDE
45	ContactPhone	Client contact home phone number. Entered by provider agency. Format ##########	10	String	Optional	DO NOT PROVIDE
46	ContactAddressLine1	Client contact's street address, line 1	30	String	Optional	DO NOT PROVIDE
47	ContactAddressLine2	Client contact's street address, line 2	30	String	Optional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
48	ContactCity	Client contact's city	30	String	Optional	DO NOT PROVIDE
49	ContactState	Client contact's state. Two character standard abbreviation.	2	String	Optional	DO NOT PROVIDE
50	ContactZip	Client contact's zip code. 9 digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #########	10	String	Optional	DO NOT PROVIDE
51	ContactEmail	Client Contact's email address. Required if this client will be authorized to login to the client portal as the client's authorized representative and approve timesheets on behalf of the client.	64	String	Optional	DO NOT PROVIDE

2.2.1   Client Designee

The client designee segment is a child/sub-segment of the client/recipient segment described above. If provided, it would be a child object within the client/recipient. There may be more than one designee for a single client/recipient. This segment is not required. The designees will granted access to Sandata EVV and have access to their specific Clients ONLY.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
Client Designee (Individual who is assigned to a client and is granted access to Sandata EVV and have access to their specific clients ONLY)						
1	ClientDesigneetFirstName	First name of the client designee	30	String	Yes	LIVE DATA
2	ClientDesigneeLastName	Last name of the client designee	30	String	Yes	LIVE DATA
3	ClientDesigneeEmail	Email address of the client designee	50	String	Yes	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.
4	ClientDesigneeStatus	Status of the Client Designee pertaining to Sandata system access. If the ClientDesigneeStatus is sent, ClientDesigneeStartDate and ClientDesigneeEndDate are not required. (Provide the 2-digit code including the 0) Sandata System can either populate the start and end date based on the date of receipt of the status or the source system can send the activation and termination date.(Please note Activation and termination dates cannot be backdated or futuredated) Available Values:02 = Active, 04 = Inactive	2	String	Conditional	02	04

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
5	ClientDesigneeStartDate	The date Client Designee was assigned. Future date is not acceptable. If the ClientDesigneeStartDate is sent, ClientDesigneeStatus is not required	10	Date	Conditional	FORMAT: YYYY-MM-DD
6	ClientDesigneeEndDate	The date Client Designee was terminated. Future date and Back date is not acceptable. If the ClientDesigneeEndDate is sent, ClientDesigneeStatus is not required	10	Date	Conditional	FORMAT: YYYY-MM-DD
7	ClientDesigneeRelationship	Relationship of the designee to the client.	30	String	Optional	Values to be determined during implementation.

2.2.2 Client Payer Information

The client payer information segment is a child/sub-segment of the client/recipient segment described above. If provided, it would be a child object within the client/recipient. There may be more than one set of client payer information for a single client/recipient. This segment is not required.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	PayerID	Sandata EVV assigned ID for the payer.	64	String	Yes	See Appendix 1: PayerID column
2	PayerProgram	If applicable, the program to which this visit belongs.	9	String	Yes	See Appendix 1: ProgramID column
3	ProcedureCode	This is the billable procedure code which would be mapped to the associated service. For most programs, it is the HCPCS number.	5	String	Yes	See Appendix 2: HCPCS column
4	ClientPayerID	Unique identifier sent by the payer.	20	String	Optional	DO NOT PROVIDE
5	ClientEligibilityDateBegin	Client eligibility begin date. This field is optional if ClientStatus is sent. Format YYYY-MM-DD	10	Date	Conditional	FORMAT: YYYY-MM-DD
6	ClientEligibilityDateEnd	Client eligibility end date. This field is optional if ClientStatus is sent. Format YYYY-MM-DD	10	Date	Conditional	FORMAT: YYYY-MM-DD
7	ClientStatus	The client's current status. Provide the 2 digit code including the 0. Valid Values: 02 = Active, 04 = Inactive	2	String	Conditional	DO NOT PROVIDE

2.2.3 PhoneNbr

This phone number segment is a child/sub-segment of the client/recipient segment described above. If provided, it would be a child object within the child/recipient. There may be more than one phone number for a single client/recipient. This segment is not required.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	Sandata-supplied ID # specific to ARIS-unique values provided for use in the testing or production environments.
2	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD	10	String	Yes	Format: ###### (6 numeric) Note: this is the consumer P value, with the "P" stripped prior to receipt by Sandata
3	ClientPhoneType	Values: Home, Mobile, Business and Other. Note: Multiple of the same type can be provided. Default to Other if not available.	12	String	Optional	Home | Mobile | Business | Other
4	ClientPhone	Client phone number. Format: ##########.	10	String	Required	LIVE DATA (formatted to match element definition)

2.2.4   Client Address

The address segment is a child/sub-segment of the client/recipient segment described above. If provided, it would be a child object within the client/recipient. There may be more than one address for a single client/recipient. This segment is not required.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. Format: This value should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	Sandata-supplied ID # specific to ARIS-unique values provided for use in the testing or production environments.
2	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD	10	String	Yes	Format: ###### (6 numeric)

Note: this is the consumer P value, with the "P" stripped prior to receipt by Sandata |
3	AddressType	Values: Home, Business, Other. Note that multiple of the same type can be provided. Default to Other if not available.	50	String	Yes	Home	Business	Other
4	ClientAddressLine1	Street Address Line 1 associated with this address. PO Box may not be acceptable for Billing and PO Box will not function correctly for MVV.	30	String	Yes	LIVE DATA
5	ClientAddressLine2	Street address line 2 associated with this address.	30	String	Optional	LIVE DATA
6	ClientCity	City associated with this address.	30	String	Yes	LIVE DATA
7	ClientState	State associated with this address. Two Character standard abbreviation.	2	String	Yes	LIVE DATA
8	ClientZip	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #####-####.	10	String	Yes	LIVE DATA

2.3 Employee

The following defines the basic information to be maintained in the Sandata EVV system relative to Employees who are servicing clients.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	Sandata-supplied ID # specific to ARIS-unique values provided for use in the testing or production environments.
2	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system. This value must be all digits and must be unique within the agency. The system will perform optimally if this value is the same length for all employees and should be no less than 4 digits. Exact length to be provided will be determined during implementation.	9	String	Yes	Format: ###### (6 numeric) Note: this is the employee D value, with the "D" stripped prior to receipt by Sandata
3	EmployeeLastName	Employee's Last Name	30	String	Yes	LIVE DATA
4	EmployeeFirstName	Employee's First Name	30	String	Yes	LIVE DATA
5	EmployeeMiddleInitial	Employee's Middle Initial	1	String		LIVE DATA
6	Department	Employee's department. The values for this field will be defined during implementation.	3	String	Optional	DO NOT PROVIDE
7	EmployeeAPI	Employee client's alternate provider identifier or Medicaid ID	25	String	Optional	DO NOT PROVIDE
8	EmployeeType	Such as nurse or home health attendant. This is user defined and varies based on the source system.	1	String	Optional	DO NOT PROVIDE
9	Discipline	Category of service. The values for this field will be defined during implementation.	17	String	Optional	DO NOT PROVIDE
10	EmployeeEmailAddress	Employee's Email Address. This value is required if the employee is to have access to the Sandata mobile application (SMC) or to the Sandata EVV Employee Portal. Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address. Sandata validates for .com, .net and .org.	50	String	Conditional	LIVE DATA
11	EmployeeAddressLine1	Street Address Line 1 associated with this address.	30	String	Optional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
12	EmployeeAddressLine2	Street address line 2 associated with this address.	30	String	Optional	DO NOT PROVIDE
13	EmployeeCity	City associated with this address.	30	String	Optional	DO NOT PROVIDE
14	EmployeeState	State associated with this address. Two Character standard abbreviation.	2	String	Optional	DO NOT PROVIDE
15	EmployeeZipCode	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #####-####.	10	String	Optional	DO NOT PROVIDE
16	EmployeePhone	Employee's phone number	10	String	Optional	DO NOT PROVIDE
17	EmployeeAltPhone	Employee's alternate phone number	10	String	Optional	DO NOT PROVIDE
18	EmployeeAltPhone2	Employee's second alternate phone number	10	String	Optional	DO NOT PROVIDE
19	EmployeeID	Unique identifier for the employee in the source system	10	String	Required	Employee D Value Format: D###### (1 alpha + 6 numeric)
20	EmployeeIDCustom1	Customized employee ID	64	String	Required	Employee D Value Format: D###### (1 alpha + 6 numeric)
21	EmployeeIDCustom2	Customized employee ID	64	String	Optional	DO NOT PROVIDE
22	EmployeeSocialSecurity	Employee's social security number.	9	String	Optional	DO NOT PROVIDE
23	PayRate	Rate for payroll.	5	Decimal	Optional	DO NOT PROVIDE (Sandata will not be managing this information- this will reside with ARIS in their Annkissam or other CDS management systems)
24	EmployeeHireDate	Employee's date of hire. If more than 1, provide latest hire date.	10	Date	Optional	DO NOT PROVIDE
25	EmployeeEndDate	Employee's HR recorded end date.	10	Date	Optional	DO NOT PROVIDE
26	EmployeeBirthDate	Employee's date of birth.	10	Date	Optional	DO NOT PROVIDE
27	EmployeeGender	Employee's gender. Values: O = Unknown or other, M = Male, F = Female	1	String	Optional	DO NOT PROVIDE
28	EmployeePrimaryLocation	The employee's primary location.	15	String	Optional	DO NOT PROVIDE
29	Status	Status of an employee. To delete a record, set to D or leave empty for an insert or update. Valid Values: NULL | D	1	String	Optional	Determined by ARIS system logic.

2.4 Schedule

DO NOT PROVIDE – (*This section is only required when the Sandata EVV Scheduling module is in use. This is not in scope for this EVV Program.*)

The following element includes the schedule information for the client. This includes both the client and employee information. Both client and employee must already exist in the system for a schedule to be successfully uploaded or it must be part of the same transaction set.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	DO NOT PROVIDE
2	ClientIDQualifier	Value being sent to unique identify the client. Values: ClientID, ClientSSN; ClientOtherID, ClientCustomID. Should be the same as the value used by the Payer if a client/member feed is provided by a payer.	20	String	Yes	DO NOT PROVIDE
3	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any unique number can be used for the client. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes	DO NOT PROVIDE
4	EmployeePINQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String	Yes	DO NOT PROVIDE
5	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system. This value must be all digits and must be unique within the agency. The system will perform optimally if this value is the same length for all employees and should be no less than 4 digits.	9	String	Yes	DO NOT PROVIDE
6	ScheduleID	Unique Identifier for the schedule record from the source system. Used to update the schedule in subsequent transfers.	40	String	Yes	DO NOT PROVIDE
7	ScheduleStartTime	Activity / Schedule start date and time.		DateTime	Yes	DO NOT PROVIDE
8	ScheduleEndTime	Activity / Schedule end date and time.		DateTime	Yes	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
9	ScheduledDuration	Duration of activity / scheduled visit. This is difference between the scheduled start time and scheduled end time. Provided in minutes.		Decimal	Optional	DO NOT PROVIDE
10	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	Optional	DO NOT PROVIDE
11	PayRate	Rate for payroll.	5	Decimal	Optional	DO NOT PROVIDE
12	BillRate	Rate for billing.	6	Decimal	Optional	DO NOT PROVIDE
13	ScheduleFlag	Cluster case indicator. Values are 0 – non-clustered and 1 – clustered.	1	String	Optional	DO NOT PROVIDE
14	DutyFree	Special functionality to deduct time not worked from the total. Must be part of the account implementation.	1	String	Optional	DO NOT PROVIDE
15	Weekend	Week ending day date and time for the schedule provided.		DateTime	Optional	DO NOT PROVIDE
16	Discipline	Category of Service provided by the Employee. The values for this field will be defined during implementation.	17	String	Optional	DO NOT PROVIDE
17	Service	Service description. The values for this field will be defined during implementation.	15	String	Condiitional	DO NOT PROVIDE
18	ProcedureCode	This is the billable procedure code. For most programs, it is the HCPCS code.	5	String	Optional	DO NOT PROVIDE
19	ProcCodeQualifier	The procedure code qualifier used in the 837. Most frequent value: 'ZZ'.	2	String	Optional	DO NOT PROVIDE
20	BillCode	The bill code associated with the schedule. Note that this may be the same as or different from the procedure code.	5	String	Optional	DO NOT PROVIDE
21	Modifier1	**Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.**	2	String	Optional	DO NOT PROVIDE
22	Modifier2	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	Optional	DO NOT PROVIDE
23	Modifier3	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	Optional	DO NOT PROVIDE
24	Modifier4	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	Optional	DO NOT PROVIDE
25	Contract	Service Contract information.	9	String	Optional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
26	Branch	Branch office if applicable.	2	String	Optional	DO NOT PROVIDE
27	VisitType	Used for billing. If visit type is set to 'V' it means charge by the visit. If set to some other value it means charge by hours subject to rounding rules. Implementing this feature requires special flags to be enabled for the account.	1	String	Optional	DO NOT PROVIDE
28	LiveInCase	24 hour live-in case. Values are Y or N. Implementing this feature requires special flags to be enabled for the account.	1	String	Optional	DO NOT PROVIDE
29	OTABHours	Special Use.	4	String	Optional	DO NOT PROVIDE
30	OTABCode	Special Use.	2	String	Optional	DO NOT PROVIDE
31	OTABApprover	Special Use.	3	String	Optional	DO NOT PROVIDE
32	CaseNumber	Case number sent as part of the schedule record. Special Use Field.	9	String	Optional	DO NOT PROVIDE
33	CaseSequence	Special Use - Case Sequence. Special Use Field.	4	String	Optional	DO NOT PROVIDE
34	ClientTimeZone	Client's primary time zone. To be provided if time zones could vary within a given account's territory. Depending on the program, this value may be defaulted to the accounts default setting or automatically calculated.	64	String	Optional	DO NOT PROVIDE
35	ClientStatus	The client's current status. Provide the 2-digit code including the 0. Available values: 02 = Active, 04 = Inactive.	2	String	Optional	DO NOT PROVIDE

2.5 XREF File

The Cross Reference (XREF) allows the agency to associate the clients with the employees who provide them service. The XREF is only required for programs where the relationship between clients and employees is needed for system functionality. One record is needed for each service the employee is providing to the client.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	Sandata-supplied ID # specific to ARIS- unique values provided for use in the testing or production environments.
2	ClientIDQualifier	Value being sent to unique identify the client. Values: ClientID, ClientSSN; ClientOtherID, ClientCustomID. Should be the same as the value used by the Payer if a client/member feed is provided by a payer.	20	String	Optional	ClientCustomID This is the same as RecipientIDCustom1 in Client segment.
3	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any unique number can be used for the client. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes	Format: ###### (6 numeric) Note: this is the consumer P value, with the "P" stripped prior to receipt by Sandata
4	EmployeeQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String	Optional	EmployeeCustomID
5	EmployeeID	Unique identifier for the employee in the source system.	10	String	Optional	Employee D Value Format: D###### (1 alpha + 6 numeric)
6	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system. This value must be all digits and must be unique within the agency. The system will perform optimally if this value is the same length for all employees and should be no less than 4 digits.	9	String	Yes	Format: ###### (6 numeric) Note: this is the employee D value, with the "D" stripped prior to receipt by Sandata

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
7	ClientStatus	The client's current status. Provide the 2-digit code including the 0. Valid values: 02 = Active, 04 = Inactive.	2	String	Conditional	Calculated by ARIS systems to yield either valid value: 02 or 04
8	Service	Service code.	12	String	Yes	See Appendix 2 HCPCS field for valid values
9	XRefStartDate	Date when the relationship began. If this value is not provided it will be assumed to be the date the record is received.		Date	Yes	FORMAT: YYYY-MM-DD
10	XRefEndDate	Date when the relationship ended. If this value is not provided, it will be assumed to be ongoing.		Date	Optional	FORMAT: YYYY-MM-DD

3 Completed Visit Download

The completed visits API is provided to allow 3rd party vendors to download completed visit information. Applying this data to the source scheduling system will be the responsibility of the vendor and/or system owners. To ensure that all activity for a given calendar day has completed, current day visits will not be provided by this interface until after midnight.

3.1 Basic Description

- An API call is made requesting complete visits for a date range.
- The API returns a session ID which can be used to query a status endpoint.
- The status endpoint will indicate when processing is complete and the visits are ready to be "picked up".
- An endpoint is used to retrieve the raw visit data. This endpoint supports pagination, as the amount of data may be large.
- Service responds with JSON feed of data matching date range.

3.2 Open-EVV EVV API Transmission Guidelines (Outbound- Sandata to Customer)

Guideline	Sandata Supported Options	Customer Details / Considerations
File Format	JSON only	JSON
Delivery Frequency	JSON options: Real Time; Hourly; Daily; On-Demand (specify details)	Real Time
Data Delivery Scope	FULL REFRESH (Complete data set each delivery each time) INCREMENTAL (Full first file, only new or altered records onward; empty file required when no data changes occurred since last delivery)	RECOMMEND: INCREMENTAL

3.3 tdsTelephonyActivity (Completed Visits)

See below for a description of fields included in the completed visit download. This service returns data in JSON format, and additional elements may be added over time. Many of the fields will only be returned based on special setups determined during implementation. The tasks element is a child element, and there may be multiple records per completed visit.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
2	ScheduleID	Unique Identifier for the schedule record from the source system.	40	String	Optional	NOT PROVIDED IN THIS PROGRAM
3	ClientID	The client id is the unique identifier for the patient / client / individual.	10	String	Optional	LIVE DATA Format: ###### (6 numeric)
4	ClientMedicaidId	Unique ID provided by the State Medicaid program to the client.	64	String	Optional	Format: 1-9 digit numeric NOTE: Not all members will have a MedicaidID
5	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system.	9	String	Optional	LIVE DATA 6 digits
6	ActivityDate	Actual start date is the date in UTC format. Time set to 0.		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
7	ActivityEndDate	Actual end date is the date in UTC format. Time set to 0.		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
8	ScheduleStartTime	Activity / Schedule start date and time.		DateTime	Optional	NULL
9	ScheduleEndTime	Activity / Schedule end date and time.		DateTime	Optional	NULL
10	ScheduledDuration	Scheduled duration in minutes. Format HH:MM	5	String	Optional	NULL
11	StartTime	Actual visit start time. Format HH:MM	5	String	Optional	FORMAT: HH:MM
12	EndTime	Actual visit end time. Format HH:MM	5	String	Optional	FORMAT: HH:MM
13	PayMinutes	Pay hours in minutes based on the value entered in Sandata EVV Visit Maintenance.		Decimal	Optional	NULL
14	Units	Calculated units based on rules for the specified payer.	999	String	Optional	NULL
15	StartType	The type of information used to define the start time. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER	10	String	Optional	IVR | FVV | MVV | MANUAL | NONSTX | OTHER

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
16	EndType	The type of information used to define the start time. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER	10	String	Optional	IVR | FVV | MVV | MANUAL | NONSTX | OTHER
17	StartPhoneNumber	If an IVR call, the phone number from which the phone call was received.	10	String	Optional	FORMAT: ##########
18	EndPhoneNumber	If an IVR call, the phone number from which the phone call was received.	10	String	Optional	FORMAT: ##########
19	Miles	Visit travel miles if Mileage Tracking is used.	9999.9999	Decimal	Optional	NULL
20	ErrandMiles	Visit errand miles if this feature is enabled.	9999.9999	Decimal	Optional	NULL
21	TravelTime	Visit travel time in minutes if this feature is enabled.	9999.9999	Decimal	Optional	NULL
22	MiscTime	Visit miscellanies time in minutes if this feature is enabled.	9999.9999	Decimal	Optional	NULL
23	MoneySpent	Money spent if this feature is enabled	9999.9999	Decimal	Optional	NULL
24	PayerName	The full name of the Payer associated with the visit.	64	String	Optional	LIVE DATA
25	Contract	Service Contract information.	9	String	Optional	NULL
26	Discipline	Discipline assigned to the employee.	17	String	Optional	LIVE DATA
27	Service	Service description.	12	String	Optional	LIVE DATA
28	CaseNumber	Case number sent as part of the schedule record.	9	String	Optional	NULL
29	LiveInFlag	Live in flag. Allowed values are Y, N	1	String	Optional	NULL
30	VisitType	Used for billing. If visit type is set to 'V' it means charge by visit. If set to some other value it means charge by hours. Implementing this feature requires special flags to be enabled for the account.	1	String	Optional	NULL
31	VisitId	Visit unique key. This value is unique to Sandata's EVV system.	64	String	Required	LIVE DATA
32	Department	Employee's department.	3	String	Optional	LIVE DATA
33	EmployeeId	Unique employee identifier in the source system.	10	String	Optional	Employee D Value Format: D###### (1 alpha + 6 numeric)
34	ApprovalUserName	User Name of approving user	30	String	Optional	NULL
35	ApprovalDateTime	Approval Date/Time		DateTime	Optional	NULL
36	AdjustedIn	Adjusted Time In		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
37	AdjustedOut	Adjusted Time Out		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
38	ESVInScore	EVV In Score (Percentage Probability)	3	String	Optional	NULL
39	ESVOutScore	EVV Out Score (Percentage Probability)	3	String	Optional	NULL
40	CSVInScore	Client EVV In Score (Percentage Probability)	3	String	Optional	NULL
41	CSVOutScore	Client EVV Out Score (Percentage Probability)	3	String	Optional	NULL
42	EVVCallInPhoneType	C = Cell, L=Landline, blank = other	1	String	Optional	C | L | NULL
43	EVVCallOutPhoneType	C = Cell, L=Landline, blank = other	1	String	Optional	C | L | NULL
44	Memo	The free form memo field from Sandata EVV.	1024	String	Optional	FORMAT: Free text
45	CarFare	Car Fare if feature is enabled.	4	String	Optional	NULL
46	BillRate	Rate for billing.	6	Decimal	Optional	NULL
47	ProcCodeQualifier	The procedure code qualifier used in the 837. Most frequent value: 'ZZ'	2	String	Optional	NULL
48	ProcedureCode	This is the billable procedure code. It can be the HPCS number.	5	String	Optional	See Appendix 2 HCPCS column
49	PayerProgram	The program to which this recipient belongs.	9	String	Optional	See Appendix 1 ProgramID column
50	PayRate	Rate for payroll.	5	String	Optional	NULL
51	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	Optional	NULL
52	Modifier1	First modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns
53	Modifier2	Second modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns
54	Modifier3	Third modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
55	Modifier4	Fourth modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns

4.3 Task

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	VisitId	Visit unique key.	64	String	Yes	NOT PROVIDED IN THIS PROGRAM
2	ScheduleID	Unique Identifier for the schedule record from the source system. Used to update the schedule in subsequent transfers.	40	String	Optional	NOT PROVIDED IN THIS PROGRAM
3	TaskID	Task id, this task id must map to the Task IDs used for the agency in the Sandata system.	4	String	Yes	NOT PROVIDED IN THIS PROGRAM
4	Reading	Task reading.	4	String	Optional	NOT PROVIDED IN THIS PROGRAM
5	Unit	Task unit.	8	String	Optional	NOT PROVIDED IN THIS PROGRAM

Appendices

1 Payers & Programs

ID	Payer ID	Program/Waiver Name	Program ID	Programs & Waivers Covered	Description
1	DVHA	Choices for Care	CFC	LTSS for adults w disabilities and older adults	
2	DVHA	Traumatic Brain Injury Program	TBI	HCBS for people w TBI	
3	DVHA	Children's Personal Care	CPCS	Personal care per epsdt for people under age 21	
4	DVHA	Attendant Services Program	ASP	Personal care for adults w disabilities and older adults	

2 Services & Modifiers

Payer	Program	HCPCS	Mod1	Mod2	Mod3	Mod4	Description
DVHA	CPCS	T1020					CPCS Personal Care
DVHA	TBI	S9125					TBI Respite Care
DVHA	ASP	S5125					Attendant Services PDAC
DVHA	CFC	T2025	71				Flexible Choices
DVHA	CFC	T2025	71	SE			Moderate Needs
DVHA	ASP	S5125	SE				Attendant Services
DVHA	CFC	T1019	81				Personal Care - Surrogate
DVHA	CFC	T1005	75				Respite Care - Consumer
DVHA	CFC	T1005	80				Respite Care - Surrogate
DVHA	CFC	S5135	75				Companion Care - Consumer
DVHA	CFC	S5135	80				Companion Care - Surrogate
DVHA	CFC	T1019	77				Personal Care Consumer

3 Reason Codes

Reason Code	Description	Note Required?
RSN-01	Caregiver Error	No
RSN-02	Member Unavailable	No
RSN-03	Mobile Device Issue	No
RSN-04	Telephony Issue	No
RSN-05	Member Refused Verification	Yes
RSN-06	Service Outside the Home	No
RSN-07	Other	Yes

4 Exceptions

Exception Code	Exception Name	Description
0	Unknown Clients	Exception for a visit that was performed for a client that is not yet entered or not found in the EVV system.
1	Unknown Employees	(Telephonic only) Exception for a visit that was performed by a caregiver who was not yet entered or not found in the EVV system (At the time the visit was recorded).
34	Invalid Service	(Telephonic Only) Exception when the service selected for a visit is not valid for the program / recipient of care.
23	Missing Service	Exception when the service provided during a visit is not recorded or present in the system.
3	Visits Without In-Calls	Exception thrown when a visit is recorded without an "in" call that began the visit.
4	Visits Without Out Calls	Exception thrown when a visit is recorded without an "out" call that completed the visit.
15	Unmatched Client ID / Phone	(Telephonic only) Exception when the visit was recorded from a phone number that was not matched to a recipient of care in the EVV system.

5 Time Zones

Time Zone Code	Daylight Savings Time Observed?
US/Alaska	Active
US/Aleutian	Active
US/Arizona	Inactive
US/Central	Active
US/East-Indiana	Active
US/Eastern	Active
US/Hawaii	Inactive
US/Indiana-Starke	Active
US/Michigan	Active
US/Mountain	Active
US/Pacific	Active
US/Samoa	Inactive
America/Indiana/Indianapolis	Active
America/Indiana/Knox	Active
America/Indiana/Marengo	Active
America/Indiana/Petersburg	Active
America/Indiana/Vevay	Active
America/Indiana/Vincennes	Active
America/Puerto_Rico	Active
Canada/Atlantic	Active
Canada/Central	Active
Canada/East-Saskatchewan	Inactive
Canada/Eastern	Active
Canada/Mountain	Active
Canada/Newfoundland	Active
Canada/Pacific	Active
Canada/Saskatchewan	Active
Canada/Yukon	Active

6 Resolution Codes

Resolution Code ID	Description
A	Written Documentation Maintained

7 Languages

LanguageID	Language Name
LANG-01	English (US)
LANG-08	Chinese (Mandarin)
LANG-09	Nepali
LANG-12	Somali
LANG-13	Spanish
LANG-14	Swahili

8 Abbreviations

Abbreviation	Name
ANI	Automatic Number Identification
BYOD	Bring Your Own Device
CDS	Consumer Directed Services
EVV	Electronic Visit Verification
FI	Fiscal Intermediary
GPS	Global Positioning System
IVR	Interactive Voice Response – the underlying system used for telephony
MVV	Mobile Visit Verification
PA	Prior Authorization
PIN	Personal Identity Number

SMC	Sandata Mobile Connect
SSN	Social Security Number
TVV	Telephonic Visit Verification

9   Terminology

Sandata Terminology	Other Possible References
Agency	Agency Provider Provider Account Billing Agency
Authorization	Service Plan Prior Auth
Client	Individual Patient Member Recipient Beneficiary
Contract	Program Program Code
Employee	Caregiver Admin Home Health Aide Consumer Directed Worker Staff Worker Individual Provider Scheduler
HCPCS	Bill Code Procedure Code

	Service Code
Payer	Admission
	Insurance Company
	Contract
	Managed Care Organization (MCO)
	State
Provider	Agency
	Third Party Administrator (TPA)