Requirement Specification for
Data Warehouse Export
Part of the Open EVV Series of Interfaces

Version 7.3

Sandata Technologies, LLC.
26 Harbor Park Dr.
Port Washington, NY 11050
Toll Free: 800-544-7263
Tel: 516-484-4400
Fax: 516-484-0679
Email: info@sandata.com
Web: www.sandata.com

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 2 of 44
Date: 8/12/2019

Table of Contents

Revision History

Version	Description	Date Updated
7.1	Updated "Units" in *VISITS_CLAIMST* segment from Integer to Decimal	3/7/2019
7.2	Updated size of visit task elements	6/10/2019
7.3	Added "CuresRequired" field. Broke client designees out into their own segment, "CLIENT_DESIGNEE"	8/12/2019

1 Overview

1.1 Data Warehouse Export

This specification documents the Aggregator data that will be sent to a 3rd party Data Warehouse. This interface includes clients, employees, visits and their associated events and modifications. All data received by the Aggregator from Sandata and third parties is included in this specification, as well as any additional elements added via Aggregator processing.

Inclusion of fields and segments in this export will be reviewed during program implementation. Not all elements will be available for all programs. Additional fields and segments may be added over time as additional functionality is added and based on program specifics.

1.2 Frequency

This information will be created and provided to Payer/State nightly, via SFTP. The file will be available by 5 am seven days a week, 365 days per year. Data included on the export file will be from 12:00 am to 11:59:59 pm of the previous day, which covers 24 hours of data per export. If no data is generated within the last 24 hours from the last export, an empty set of files will be delivered.

If an issue is found, that causes a file to be regenerated, the next file generated during the standard run will begin with a start date of the end of the last successfully completed file through midnight the previous day.

Sandata will have the ability to export all data on an as-requested basis.

1.3 Incremental

Only new information and updates will be provided via this interface. This is an add/update interface. Delete transactions are not provided, as Sandata does not physically delete information. The file created for Payer/State will include all related information for clients, employees and visits in the program.

1.4 Historical Data

Visit history will be tracked and all visit changes will be included in the export if there are any changes to that visit since the last export. The main visit information will be included in the main section of the visit. All prior states of the visit since the last export will be included in the 'Historic Visit Changes' section. The "ChangeID" field will provide a summary description of the changes done on the visit. Third Party historical data as well as information captured by the Sandata EVV system will be included if received, along with any information calculated by the Aggregator.

Client and employee information will be noted based on a change date/time showing that information has changed since the last version sent and will only include the value as it exists at the time of the export. If the export is run for more than a single day period, records could be present for multiple individual days for either the client or employee.

2 Full Export Request

Whenever a full extract is required, Payer/State will need to put in a request via Sandata Account Management for a "Full Data Warehouse Export" to be produced, Sandata will require a date range for the data that is to be included in the file. Due to size constraints, the SFTP location provided will need to allocate sufficient storage space for the file requested. Sandata will provide a full data extract at program go-live as a starting point.

3 Data Type Format Details

Data Type	Description	Example
DateTime	The **date** and **time** is represented as a string with the following format: YYYY-MM-DDTHH:MM:SSZ All times will be provided in UTC. If time is not material, it will be provided as is expected.	2016-12-20T16:10:28Z
Date (only Date)	The data is represented as a string with the following format: YYYY-MM-DD Date only will be sent in UTC format.	2016-12-20

Data Type	Description	Example
Timezone	All time for tracking visits will be in UTC. All **time zone** values will be derived from the Internet Assigned Numbers Authority (IANA) Time Zone Database, which contains data that represents the history of local time for locations around the globe. It is updated periodically to reflect changes made by political bodies to time zone boundaries, UTC offsets, and daylight-saving rules. The Time zone name expected in each transaction is the actual Time zone where the event took place. i.e. US/Eastern	A complete list of time zones can be found at: https://www.iana.org/time-zones See Appendix for list of Timezones
String	A **string** is a row of zero or more characters which can include letters, numbers, or other types of characters as a unit, not an array of single characters. (e.g. plain text).	"This is a string" (See Wikipedia String)
Integer	An **integer** is a numeric value without a decimal. Integers are whole numbers and can be positive or negative.	52110 (positive) -87721 (negative) (See Wikipedia Integer)
Decimal	A floating point number is referred to as a **decimal**. Can be positive or negative.	8221.231 (positive) -71.214 (negative) (See Wikipedia Decimal)
Boolean	A logic predicate indicator that can be either true or false.	True False See Wikipedia Boolean

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 8 of 44
Date: 8/12/2019

4 Data Exchange

4.1 Delimiter Separated Values (DSV)

A delimited file is a text file used to store data, in which each line represents a single record (i.e. Provider) and each line has fields separated by the agreed upon delimiter. Compared to a fixed-length formatted files that uses spaces or other filler characters to force the length of a given field to be fixed in width/size for every value, a delimited file has the advantage of allowing field values of any length. Additionally, when accompanied by a "header row" (the first row in a file) that provides for the names of each column of data, columns of data can arrive in any order and columns may be added or removed without having to re-write rules for data transformation.

NOTE: The very first line within the DSV is the header record. (See Header Record)

4.2 Supported Delimiters

Acceptable delimiters supported by this specification include:

- Pipe or Vertical Bar (|); ASCII 124 or UTF-8 007C

- Comma (,); ASCII 44 or UTF-8 002C

Value to be provided will be determined during implementation.

4.3 End of Line Characters

- Each record within the delimited file will be located on a new line, which is composed of two characters, carriage return (\r) and line feed (\n).

4.4 Double Quotes

- Each field will be enclosed with double quotes ("").
- However, NULL data does NOT use double quotes
    Example: "<PAYER>"|"HHS"|"North America"|"MedicaidID"||"123456789"

4.5 Character Encoding

- Each field within the delimited file will conform to the ASCII/UTF-8 character encoding standard.

4.6 Header Record

The header record provides for the names of each column of data found in the delimited file. Columns of data can arrive in any order and columns may be added or removed without having to re-write rules for data transformation.

NOTE: Rules around column data points will be discussed with Sandata during implementation. Removing required columns from the delimited file that are critical to the import process will cause an error and the entire file will be rejected.

• The header record is the first record at the top of the delimited file.
• The header record is _required_.
• The field names in the header record, also known as column names, _must_ conform to the names provided by Sandata. (See Field Names)

Example: "ProviderID"|"ProviderQualifier"|"ProviderName"|"<PAYER>ID"| … | "LocationPhone"

4.7 File Naming Convention

Each defined segment will include all required identifying information in the .dsv file and each will be created as a separate file.

NOTE: Underscores (_) will be used to separate each variable section of the file name.
An example of how files will be named is provided below.

• [Prefix]_[SEGMENT]_[MMDDYY]_[HH_MM_SS].[FileExtentions]
  o [Prefix] is a customer specific string agreed upon with Sandata during implementation. ("<PAYER>_EVV_DWExtract")
  o [SEGMENT] is the name of the domain specific name of the parent entity that reflects the data fields within the DSV file
  o [MMDDYY] is the two-digit month, two-digit day, and two-digit year, that the file was created
  o [HH_MM_SS] is the two-digit hours, two-digit minutes and two-digit seconds values (Military Time)
  o [FileExtentions]
    ▪ [.dsv] signifies a comma separated file
    ▪ [.dsv] signifies a delimiter separated file (specific delimiters are agreed upon with the customer during implementation)
    ▪ [.zip/.gzip/.gz/.tar/.7z] signifies the compression used.
      Compression methodology will be discussed during implementation
    ▪ [.gpg] signifies that the file has been encrypted with PGP [See File Encryption]
• Example format
  o <PAYER>_EVV_DWExtract_VISIT_GENERAL_081718_03_15_55.dsv.gpg

4.8 File Retention

Sandata will retain the file for a period of no less than 10 days should an issue be detected with the file copied to the agreed upon SFTP site. Payer/State can request the file be manually recopied if needed. The file naming convention has been agreed upon during implementation, and is important to help with validation, entity mapping, dates and times to make sure files are not overwritten and loaded in the order they are received, extensions to drive the parsing and decryption logic, etc.

4.9 File Encryption

File encryption is encouraged to add an additional layer of security for sensitive PHI data. Files are processed over Secure FTP (SFTP) which provides its own layer of encryption as well.
- Sandata supports file encryption using OpenPGP (RFC4880).
- Sandata will provide customers with a public key upon implementation.
- PGP encrypted files will append the "gpg" file extension.

4.10 Cryptographic Hash (Optional)

A cryptographic hash function can provide strong assurance about data integrity, whether changes of the data are accidental (e.g., due to transmission errors) or maliciously introduced. Any modification to the data will be detected through a mismatching hash value. Furthermore, given some hash value, it is infeasible to find some input data (other than the one given) that will yield the same hash value.
- The customer can calculate the hash value for each DSV file and provide that value in the control file.
- When calculating the hash, any of the following hash functions can be used:
    - SHA-1
    - SHA-2 (SHA-256/512)
    - SHA-3 (Most Secure) (Recommended)
- NOTE: MD5 is no longer supported as it has known security vulnerabilities
- This hash value of a file is optional. Sandata will validate the hash if one is provided in the control file under the "Hash" column. (See Control File)

4.11 Control File

Control files are used as a quality control mechanism to ensure file integrity following transmission.

- Sandata will provide the customer with a control file.
- The control file will be named as follows
    - [Prefix]_Control_[MMDDYY]_[HH_MM_SS].[FileExtentions]
        - [Prefix] is a customer specific string agreed upon with Sandata during implementation ("<PAYER>_EVV_DWExtract")

- ▪ [MMDDYY] is the two-digit month, two-digit day, and two-digit year, that the file was created
- ▪ [HH_MM_SS] is the two-digit hours, two-digit minutes and two-digit seconds values (Military Time)
- ▪ [FileExtentions]
  - • [.dsv] signifies a comma separated file
  - • [.dsv] signifies a delimiter (i.e. non-comma / PIPE) separated file
  - • [.zip/.gzip/.gz/.tar/.7z] signifies the compression used
- The control file uses the pipe (|) delimiter value.
- The control file will have the following in the first row:
  - o "Total Files"|"{number of files}"
- The control file will then have a row corresponding to each of the files in the delivery, with the following data fields:
- "{file name}"|"{number of records}"
- The control file will end with the following four lines:
- "Grand total of records generated"|"{total of records}"
- "File Size"|"{file size in Mb}"
- "Export Start Date Time"|"{date-time}"
  - o This date/time represents the "from" date and time of data being extracted
- "Export End Date Time"|"{date-time}"
  - o This date/time represents the "to" date and time of data being extracted
- Example Sandata-Recipient control file:

```
"<PAYER>_EVV_DWExtract_Control_101118_01_43_45.dsv.gpg
"Total Files"|"15"
"<PAYER>_EVV_DWExtract_VISIT_CALLS_101118_01_43_44.dsv"|"65"
"<PAYER>_EVV_DWExtract_PROVIDER_LOC_101118_01_43_44.dsv"|"65"
"<PAYER>_EVV_DWExtract_CLIENT_GENERAL_101118_01_43_44.dsv"|"1749"
"<PAYER>_EVV_DWExtract_CLIENT_DESIGNEE_101118_01_43_44.dsv"|"1749"
"<PAYER>_EVV_DWExtract_CLIENT_AUTH_101118_01_43_44.dsv"|"1749"
 "<PAYER>_EVV_DWExtract_CLIENT_ADDR_101118_01_43_44.dsv"|"1749"
"<PAYER>_EVV_DWExtract_CLIENT_PHONE_101118_01_43_44.dsv"|"1733"
"<PAYER>_EVV_DWExtract_CLIENT_SCHEDULE_101118_01_43_44.dsv"|"0"
"<PAYER>_EVV_DWExtract_EMP_GENERAL_101018_11_56_03.dsv"|"3"
"<PAYER>_EVV_DWExtract_EMP_DISC_101018_11_56_03.dsv"|"3"
"<PAYER>_EVV_DWExtract_VISIT_GENERAL_101018_11_56_03.dsv"|"4"
"<PAYER>_EVV_DWExtract_VISIT_CALLS_101018_11_56_03.dsv"|"6
"<PAYER>_EVV_DWExtract_VISIT_TASKS_101018_11_56_03.dsv"|"0"
"<PAYER>_EVV_DWExtract_VISIT_EXCP_101018_11_56_03.dsv"|"10"
"<PAYER>_EVV_DWExtract_VISIT_CHANGES_101018_11_56_03.dsv"|"12"
"<PAYER>_EVV_DWExtract_VISIT_CLAIMST_101018_11_56_03.dsv"|"0"
"Grand total of records generated"|"10646"
"File Size"|"0.84"
"Export Start Date Time"|"2018-07-31T20:00:00Z"
"Export End Date Time"|"2018-10-30T16:00:00Z"
```

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 12 of 44
Date: 8/12/2019

4.12 Error File

SANDATA-RECIPIENT ERROR HANDLING PROCESS
- **RECIPIENT** will notify Sandata via email to alert of any errors found in processing each provided file.
- **RECIPIENT** will not send emails or error files if there are no errors detected for the delivery.
- The email would be addressed to Interface_DWH_<PAYER>@sandata.com
- The email Subject would include "Sandata-<PAYER> DWH errors: {date of files}"
- The email Body would include (at a minimum) lines for "file name", "number of errors found"
- This email can be generated manually or by a system process created by the RECIPIENT.

4.13 File Transport

Files will be consumed and delivered via Secure FTP (SFTP). The target SFTP server will be hosted by **RECIPIENT**. The host IP, username, password and optional public cryptographic key will be established, configured and tested during implementation.

4.14 File Location

DSV files will be located on the **RECIPIENT** secure SFTP, in a folder created specifically for Sandata, "/Sandata/<PAYER_FOLDER_NAME>/".

4.15 File Frequency

This information will be created and provided to Payer/State nightly, via SFTP. The file will be available by 5 am seven days a week, 365 days per year. Data included on the export file will be from 12:00 am to 11:59:59 pm of the previous day, which covers 24 hours of data per export. If no data is generated within the last 24 hours from the last export, an empty set of files will be delivered.

5 Data Warehouse Segment Files

The file name below will represent the file generation date/time. Each defined segment will include all required identifying information in the .dsv file and each will be created as a separate file.

Naming convention: <Payer/State>_EVV_DWExtract_SEGMENT_mmddyy_hh_mm_ss.dsv

Sandata will retain the file for a period of no less than 10 days should an issue be detected with the file copied to the SFTP site. Payer/State can request the file be manually recopied if needed.

5.1 Fields Overview

The following are all the fields that will be included in the interface specification. All fields in this specification are exported regardless of their intended use. RECIPIENT may choose to ignore these fields at their own discretion.

All referenced fields will be exported. However, on a program-by-program basis, some fields may be irrelevant and contain no data. The exported data will mirror the program specific data captured on intake interfaces and via other means, such as the EVV user interface.

Further, the "Type" column denotes the intended use of the data in that column despite all columns (other than NULL) being supplied with double quotes as noted elsewhere in this document.

Also note that additional fields may be added in the future and become available. RECIPIENT should not rely on a hard-coded list or order of fields, but rather use the header row to pull fields they consider relevant. This will help prevent issues in the future should additional fields become available.

5.2 Data Hierarchy and Fields List

The table below describes how the segments relate to each other from a logical perspective. It is followed by a detailed description of the interface fields.

Segment	Identifying Field(s)	Parent(s)	Related Field(s)
PROVIDER_GENERAL	ProviderID	(none)	
PROVIDER_LOC	PayerID	PROVIDER_GENERAL	ProviderID
CLIENT_GENERAL	ProviderID ClientID	PROVIDER_GENERAL	ProviderID
CLIENT_DESIGNEE	ClientDesigneeEmail	CLIENT_GENERAL	ClientID

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 14 of 44
Date: 8/12/2019

Segment	Identifying Field(s)	Parent(s)	Related Field(s)
CLIENT_AUTH	AuthID	PROVIDER_GENERAL PROVIDER_LOC CLIENT_GENERAL	ProviderID PayerID ClientID
CLIENT_ADDR	AddressID	CLIENT_GENERAL	ClientID
CLIENT_PHONE	ClientPhone	CLIENT_GENERAL	ClientID
SCHEDULE	ScheduleID	PROVIDER_GENERAL PROVIDER_LOC CLIENT_GENERAL EMP_GENERAL	ProviderID PayerID ClientID EmployeeID
EMP_GENERAL	ProviderID EmployeeID	PROVIDER_GENERAL	ProviderID
EMP_DISC	ProviderID EmployeeID	PROVIDER_GENERAL EMP_GENERAL	ProviderID EmployeeID
VISIT_GENERAL	VisitKey	PROVIDER_GENERAL PROVIDER_LOC CLIENT_GENERAL EMP_GENERAL	ProviderID PayerID ClientID EmployeeID
VISIT_CALLS	CallKey	VISIT_GENERAL	VisitKey
VISIT_TASKS	VisitKey TaskID	VISIT_GENERAL	VisitKey
VISIT_EXCP	VisitKey ExceptionID	VISIT_GENERAL	VisitKey
VISIT_CHANGES	VisitKey ChangeID	VISIT_GENERAL	VisitKey
VISIT_CLAIMST	VisitKey TransactionID BatchID	VISIT_GENERAL	VisitKey

6 Provider Information

6.1 General Provider Information (PROVIDER_GENERAL)

This is the parent entity for the client, employee and visit information. This is the general identifying information for the information to follow. It also includes all information about the provider. Note that while the ProviderID is noted as being unique, it is possible for a single provider to have multiple Sandata accounts in which case there may be multiple entries for the same ProviderID.

Column Name	Description	Max Length	Type
ProviderQualifier	Identifier being sent as the unique identifier for the provider. Values: SandataID, NPI, API, MedicaidID, TaxID, Taxonomy, Legacy, Other.	20	String
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ProviderName	The provider name provided.	30	String
ProviderDoingBusinessAs	Doing Business As name of the Provider/Agency.	50	String
AddressLine1	Mailing address line 1. This is the street address for a provider.	50	String
AddressLine2	Mailing addresses line 2. This is the mailing address for a provider.	50	String
AddressCity	Mailing address city. This is the city where a provider would receive business mail.	30	String
AddressState	Mailing address state. This is the state where a provider would receive business mail.	2	String
AddressZip	Mailing address zip code. This is the full nine digits of the zip code for a business mailing zip code.	9	String
County	County in which the provider is located.	30	String
AgencyPhone	Phone for the primary address. Full 10 digits, no dashes.	10	String
AgencyEmail	E-Mail address for the agency's primary contact.	64	String
PrimaryContactLastName	Last name for the primary contact.	30	String
PrimaryContactFirstName	First name for the primary contact.	30	String
VendorID	The identifier specifying the source of the EVV data for the provider. Supplied if the program includes multiple EVV Vendors.	50	String
ProviderFax	Provider 10 digit fax number if applicable.	10	String
ProviderNPI	Provider NPI Number.	10	String
ProviderAPI	Provider API Number.	30	String

Column Name	Description	Max Length	Type
ProviderMedicaidID	This is the Medicaid ID assigned to the provider agency by the Medicaid authority.	9	String
SSN	This is the SSN number assigned to a provider by the Internal Revenue Service. Digits only. Must include leading zeroes.	9	String
TaxID	This is the tax identification number assigned to a provider by the Internal Revenue Service. This is the current Tax ID. Digits only. Must include leading zeroes.	9	String
ProviderTaxonomy	Provider Taxonomy Number. Provide Digits Only.	9	String
ProviderRequireAuth	Is an authorization required for billing? Values 0 and 1. 0 = False 1 = True	1	String
ProviderTimeZone	Primary time zone of the provider.	64	Timezone
ProviderDateBegin	Date provider account was created.	10	Date
ProviderDateEnd	Date provider ended contract. The contract end date for the provider will be null unless it is current date or in the past. Date only will be provided (no time) and no time zone conversion to be applied.	10	Date

6.2 Provider Location Information (PROVIDER_LOC)

If information is available for provider location(s), the following information may be provided. This segment is only supported for SAM implementations. Uniqueness for this entity is defined as PayerID + ProviderID + LocationName.

Column Name	Description	Max Length	Type
PayerID	Sandata assigned identifier for the payer. Determined during the implementation process.	64	String
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
LocationName	Name associated with the location. LocationName must be unique within the provider.	20	String
LocationIdentifier	Provider location identifier. Could be the NPI, API, Provider Assigned Medicaid ID etc.	30	String

Column Name	Description	Max Length	Type
LocationAddressLine1	Line 1 of the location address.	50	String
LocationAddressLine2	Line 2 of the location address.	50	String
LocationCity	City for the location.	30	String
LocationState	State for the location. Two letter state abbreviation.	2	String
LocationZip	Location 9 digit Zip Code. If additional 4 digits is not known, provide zeros. Format #########	9	String
LocationContactLastName	Location Contact Last Name.	30	String
LocationContactFirstName	Location Contact First Name.	30	String
LocationPhone	Phone number for the location. Format ##########	10	String

7 Client

All client records will be generated as a set. The CLIENT_GENERAL will be used as the parent. All children will be provided assuming they are in-use for the program. The Add/Change/Delete indicator will be used to drive processing for all Client files.

7.1 Client - Client General Information (CLIENT_GENERAL)

Clients for the Business Entity / Provider Medicaid IDs. This is the parent entity for the set of client information. This element including all children will only be sent if the information in the parent or any of the children elements is new or has changed. The Primary Key for Client_General is PayerID + ProviderID + ClientID. The client is also unique based on the PayerID + ClientMedicaidID (or the unique value supplied by the state. When CLIENT_GENERAL is provided, all sub elements will also be provided.

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

Column Name	Description	Max Length	Type
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system.	10	String
ClientFirstName	Client's First Name.	30	String
ClientMiddleInitial	Client's Middle Initial. May be required if needed for billing.	1	String
ClientLastName	Client's Last Name.	30	String
MissingMedicaidID	Indicator that a patient is a newborn. If this value is provided, Client Medicaid ID will be ignored and will be valid as null. Values True/False	5	Boolean
ClientSSN	Client's Social Security Number. If the Field is left empty, ClientOtherID must be populated. Not required if ClientOtherID sent. Numbers only, no dashes and leading zeroes must be included. May be required if needed for billing. Format - #########	9	String
ClientMedicalRecordNum	Client's medical record number if it is applicable.	12	String

Column Name	Description	Max Length	Type
ClientMedicaidID	Unique ID provided by the State Medicaid program to the client.	64	String
ClientCustomID	Additional Client user-defined identifier. Commonly used to customize the built-in client ID within the system. May be equal to another ID provided.	24	String
ClientOtherID	Additional Client user-defined Identifier. Commonly used to store client's ID from another system. This value is used to match the client to an existing record during import. During implementation it will be determined if this value or the ClientSSN will be used for matching.	24	String
ClientSuffix	Client Suffix (e.g. Sr, Jr, III, IV, V (no special characters)).	4	String
Extended Demographics – all optional – exact fields to be provided will be determined during implementation.			
Coordinator	The identified assigned to the Client which associates the client to their Coordinators for an employee.	25	String
ClientCoordinatorEmail	Email address of client's agency coordinator.	64	String
ClientLanguage	Client's language. The list of acceptable values will be determined during implementation.	32	String
ClientGender	Client's Gender. Values: O=Unknown or Other, M=Male, F=Female.	1	String
ClientMaritalStatus	Client's Marital Status. Values: M = Married, S = Single, W = Widowed, O = Other.	1	String
ClientBirthDate	Client's Date of Birth. Required for billing.	10	Date
ClientEmail	Client's email address. Required for client portal access.	64	String
ClientPriority	Allows designation of a client's priority. Generally used to designate clients whose service is critical. Values will be determined during implementation if applicable.	2	String
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	Timezone
ClientContactType	Client Contact Type. Values: Family, Other.	12	String

Column Name	Description	Max Length	Type
ClientContactFirstName	Client Contact First Name. Entered by provider agency.	30	String
ClientContactLastName	Client Contact Last Name. Entered by provider agency.	30	String
ClientContactPhoneType	Client Contact's Phone Type. Values: Business, Home, Mobile, Other.	12	String
ClientContactPhone	Client Contact Home Phone Number. Entered by provider agency. Format ##########	10	String
ClientContactEmailAddress	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
ClientContactAddressLine1	Client Contact's Street Address, Line 1.	30	String
ClientContactAddressLine2	Client Contact's Street Address, Line 2.	30	String
ClientContactCity	Client Contact's City.	30	String
ClientContactState	Client Contact's State. Two Character standard abbreviation.	2	String
ClientContactZip	Client Contact's Zip Code. 9-digit primary address zip code. If additional 4 digits is not known, zeros padded. Format #########	9	String

7.2 Client – Designees (CLIENT_DESIGNEE)

Individuals who are assigned to a Client and are granted access to Sandata EVV and have access to their specific Clients ONLY. Values will ONLY be provided if Client Designees are supplied in the incoming member file or via Client Entry by the provider.

Column Name	Description	Max Length	Type
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system.	10	String
ClientDesigneeFirstName	First Name of the Client Designee.	30	String
ClientDesigneeLastName	Last Name of the Client Designee.	30	String
ClientDesigneeEmail	Email address of the Client Designee.	50	String
ClientDesigneeStatus	Status of the Client Designee pertaining to Sandata system access. 02 = Active, 04 = Inactive.	2	String
ClientDesigneeStartDate	The date Client Designee was assigned.	10	Date
ClientDesigneeEndDate	The date Client Designee was terminated.	10	Date
ClientDesigneeRelationship	Relationship of the designee to the client.	30	String

7.3 Client – Programs and Services (CLIENT_AUTH)

All programs and services within the payer that the client participates in. If authorizations are being provided, this information will be derived from the authorization. All fields below are required for uniqueness other than the ClientRegion. PayerProgram and PayerService, if null would be considered for uniqueness as well (e.g. no Program or Service)

Column Name	Description	Max Length	Type
AuthID	Sandata assigned unique identifier for the payer/program/service mapping.	16	String
PayerID	Sandata assigned identifier for the payer. Determined during the implementation process.	64	String
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system.	10	String
PayerProgram	If applicable, the program to which this client belongs. List of values to be determined during implementation.	9	String
ClientPayerID	Unique Client ID for the Payer if different from the Client's Medicaid ID.	20	String
PayerRegion	If applicable, the region code in which this client is being provided services. List of values to be determined during implementation.	2	String
PayerService	If applicable, the service to which this client belongs. List of values to be determined during implementation. Generally provided as a HCPCS code. Field may be larger if a different value is selected.	5	String
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
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
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

Column Name	Description	Max Length	Type
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
ClientEligibilityDateBegin	Client Eligibility Begin Date.	10	Date
ClientEligibilityDateEnd	Client Eligibility End Date.	10	Date
ClientStartOfCareDate	Start of Care Date.	10	Date
ClientEndOfCareDate	End of Care Date.	10	Date
ClientStatus	The client's current status. Provide the 2-digit code including the 0. Available values: 01 = Pending, 02 = Active, 03 = Hold, 04 = Inactive.	2	String
ClientStatusDate	The date of the last status change. If not provided, current date will be assumed. Entered by Payer.	10	Date
IsPrimary	Is this the client's primary diagnosis code. If more than 1 are noted as primary, one will be selected. Value: true/false.	5	Boolean
DiagnosisCode	The client's diagnosis code in ICD-10 format.	10	String

7.4 Client - Address (CLIENT_ADDR)

This is a child of the Individual/Client General Information. There can be any number of Individual/Client Address records. ProviderID + ClientID define the identifying elements, but these will repeat for each address provided.

Column Name	Description	Max Length	Type
AddressID	Sandata assigned unique identifier for the address.	16	String
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system.	10	String
ClientAddressType	Values: Home, Business, Other. Note that multiple of the same type can be provided.	12	String
ClientAddressLine1	Street Address Line 1 associated with this address.	30	String
ClientAddressLine2	Street Address Line 2 associated with this address.	30	String
ClientCounty	County associated with this address.	25	String
ClientCity	City associated with this address.	30	String
ClientState	State associated with this address. Two Character standard abbreviation.	2	String
ClientZip	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, zeros padded. Format #########	9	String

7.5 Client - Phone (CLIENT_PHONE)

This is an optional child for the Individual / Client General Information. It is required for automatic matching for telephony. There can be any number of Individual/Client Phone Records. All fields other than ClientPhoneType are required for uniqueness.

Column Name	Description	Max Length	Type
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system.	10	String
ClientPhoneType	Values: Home, Mobile, Business and Other. Note that multiple of the same type can be provided.	12	String
ClientPhone	Client phone number. Format ##########	10	String

7.6 Client - Schedule (SCHEDULE)

The following element includes the schedule information for the client. This includes both the client and employee information. The client must exist in the system for a schedule to be successfully uploaded. Some programs require the employee to exist as well prior to uploading the schedule. In case if they do not pre-exist in the Sandata EVV database both client and Employee should be available in the same transfer. Schedules will be provided if available / applicable. Uniqueness defined by PayerID + ProviderID + ScheduleID.

Column Name	Description	Max Length	Type
PayerID	Sandata EVV assigned identifier for the payer associated with the schedule.	64	String
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system.	10	String

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 26 of 44
Date: 8/12/2019

Column Name	Description	Max Length	Type
EmployeeID	Unique employee identifier. This value uniquely identifies the employee in the Sandata system.	9	String
ScheduleID	Unique identifier for the schedule record.	16	String
ScheduleStartDate	Activity / Schedule start date is the date in UTC.	10	Date
ScheduleStartTime	Activity / Schedule start date and time.	20	DateTime
ScheduleEndTime	Activity / Schedule end date and time.	20	DateTime
ScheduleDuration	Duration of activity / scheduled visit. This is difference between end time and start time. In minutes.	10	String
PayRate	Rate for payroll. Provided if rate is specified as part of the schedule received.	5	String
BillRate	Rate for billing. Provided if rate is specified as part of the schedule received.	6	String
ClusterCaseFlag	Cluster case indicator. true/false. This is special use.	5	Boolean
Discipline	Type of service provided by the Employee.	6	String
PayerProgram	Program for which services are being provided. Determined during implementation.	9	String
PayerService	Service to be provided. This is the billable procedure code. For most programs, it is the HCPCS number.	5	String
VisitType	Used for billing. If visit type is set to 'V' it means charge by visit. Other values may be determined during implementation.	1	String
LiveInCase	24 hour live in case. Values are true/false.	5	Boolean
ScheduleTimeZone	Schedule time zone – if different that the client's default.	64	Timezone
Modifier1	First modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	2	String
Modifier2	Second modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	2	String
Modifier3	Third modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	2	String

Column Name	Description	Max Length	Type
Modifier4	Fourth modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	2	String

8 Employee

All employee records will be generated as a set. The EMP_GENERAL will be used as the parent. All children will be provided assuming they are in-use for the program.

8.1 Employee – Employee General Information (EMP_GENERAL)

Employees for the Business Entity / Provider Medicaid IDs. This is the parent entity for the Employees providing care. This element will only be sent if the information is new or has changed. Uniqueness is defined by ProviderID + EmployeeID. When EMP_GENERAL is provided, all sub elements will also be provided.

Column Name	Description	Max Length	Type
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
EmployeeID	Unique employee identifier. This value is the Employee key field to the source system or other identifier for the Employee.	9	String
EmployeeLastName	Employee's last name.	30	String
EmployeeFirstName	Employee's first name.	30	String
Department	Employee's department.	3	String
EmployeeType	Such as nurse or home health attendant. This is user defined varies based on the source system.	1	String
EmployeeEmail	Employee Email Address	64	String
EmployeeAddress1	Employee's address.	30	String
EmployeeAddress2	Employee's address (line 2).	30	String
EmployeeCity	Employee's city.	30	String
EmployeeState	Employee's state.	2	String
EmployeeZipCode	Employee's 9 digit zip code. If additional 4 digits is not known, zeros padded. Format #########	9	String
EmployeePhone	Employee's phone number. Format ##########	10	String
PayRate	Rate for payroll. Can have values like 5.043 or 1.23 and should not exceed 5 characters. Decimal point is included in the length.	5	String
EmployeeIDCustom1	Customized Employee id. Also known as Employee Other ID.	64	String

Column Name	Description	Max Length	Type
EmployeeIDCustom2	Customized Employee id. Also known as Employee Custom ID.	64	String
SocialSecurity	Employee SSN.	9	String
EmployeeAPI	Employee Client's Alternate Provider Identifier or Medicaid ID.	25	String
EmployeeHireDate	Date of Hire.	10	Date
EmployeeBirthDate	Employee's date of birth.	10	Date
EmployeeLocationName	The Employee's primary location.	20	String

8.2 Employee - Discipline (EMP_DISC)

Employees for the Business Entity / Provider Medicaid IDs. This is the parent entity for the Employees providing care. This element will only be sent if the information is new or has changed. Optional segment. Will be provided if information exists. All fields are required for uniqueness.

Column Name	Description	Max Length	Type
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier. 15 Character Unique Provider Identifier provided.	64	String
EmployeeID	Unique employee identifier. This value uniquely identifies the employee in the Sandata system.	9	String
EmployeeDiscipline	Code defining the discipline(s) of the employee. Examples depending on the program include HHA, RN, LPN, PT, etc.	6	String

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 30 of 44
Date: 8/12/2019

9 Visit

All visit records will be generated as a set. The VISIT_GENERAL will be used as the parent. All children will be provided assuming they are in-use for the program. When VISIT_GENERAL is provided, all sub elements will also be provided.

Note that for a 'delete' record, based on the VisitStatus field, only the VisitKey and the actual Delete Flag are required elements in the response although other fields may be provided.

9.1 Visit – Visit General Information (VISIT_GENERAL)

This is the parent entity for the actual visit for the Business Entity / Provider Medicaid IDs. The Primary Key for Visit_General is the "VisitKey". VisitKey will span Payers and Providers.

Column Name	Description	Max Length	Type
PayerID	Sandata assigned identifier for the payer. Determined during the implementation process.	64	String
ProviderID	Identifier for the provider. Identifier type identified by ProviderQualifier.	64	String
ClientID	Assigned client identifier. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable. This value uniquely identifies the client in the Sandata system. Note that visits that cannot be clearly identified as belonging to Payer will be excluded from the export. Note: ClientID can be NULL ONLY when the VisitStatus is "Deleted"	10	String
EmployeeID	Unique employee identifier. This value uniquely identifies the employee in the Sandata system.	9	String
VisitKey	Visit identifier in the Sandata system. Note that the same VisitKey can be sent multiple times over the course of different exports. Subsequent VisitKeys are updates to the prior visit.	50	String
VisitOtherID	Visit identifier in the external EVV system, if any.	50	String
VisitCancelledIndicator	true/false – if omitted visits are requested and/or if a visit that has already been sent has been invalidated for some reason, this indicator would be sent as true.	5	String

Column Name	Description	Max Length	Type
PayerProgram	If applicable, the program to which this client belongs. List of values to be determined during implementation.	9	String
ProcedureCode	HCPCS Code denoting service.	5	String
Timezone	Time zone for Payer/State.	64	Timezone
CallInDateTime	The date/time of the actual Call In. If additional information is needed about the call, it is in the VISIT_CALL element.	20	DateTime
CallOutDateTime	The date/time of the actual Call Out. If additional information is needed about the call, it is in the VISIT_CALL element.	20	DateTime
ActDuration	Actual, calculated duration (Call Out – Call In) in Minutes.	10	Integer
AdjBeginningDateTime	Adjusted in date/time if entered manually. Otherwise the actual date/time received.	20	DateTime
AdjEndDateTime	Adjusted out date/time if entered manually. Otherwise the actual date/time received.	20	DateTime
AdjDuration	Adjusted, calculated duration (Adj Call Out -Adj Call In) in Minutes	10	Integer
BillVisit	If the visit is going to be billed. true/false	5	Boolean
BillTime	Minutes that are going to be billed.	8	Integer
PayTime	Minutes that are going to be paid.	8	Integer
Memo	The free form memo field from Sandata EVV or 3rd Party System.	1024	String
EmpVoiceVerification	true/false If voice verification is in use, did the employee's voice recording match the enrollment information.	5	Boolean
ClientVerifiedTimes	true/false	5	Boolean
ClientVerifiedService	true/false	5	Boolean
ClientVerifiedTasks	true/false	5	Boolean
ClientSignatureAvailable	true/false The actual signature will not be transferred. The originating system will be considered the system of record.	5	Boolean

Column Name	Description	Max Length	Type
ClientVoiceRecording	true/false The actual voice recording will not be transferred. The originating system will be considered the system of record.	5	Boolean
ClientVoiceVerification	true/false If voice verification is in use, did the client's voice recording match the enrollment information.	5	Boolean
VisitStatus	Status of the visit as calculated by the Aggregator. Values: Omit, Scheduled, In Process, Incomplete, Verified, Processed, Deleted.	30	String
GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group. Note that Alternate EVV vendors may not supply this value.	6	String
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
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
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
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
CuresRequired	Indicates that service provided requires EVV.	5	Boolean

9.2 Visit - Calls (VISIT_CALLS)

Call Information regardless of call type. This is an optional element in some circumstances including visits received from a 3rd Party provider or a provider using scheduling could exist without any associated calls. VisitKey is unique throughout the Sandata system and will be assigned during 3rd party EVV system import as required. The Primary Key for Visit_Calls is the "CallKey".

Column Name	Description	Max Length	Type
VisitKey	Visit identifier in the Sandata system.	50	String

Column Name	Description	Max Length	Type
CallKey	Call identifier in the Sandata system.	50	String
CallDateTime	Call date time.	20	DateTime
CallAssignment	Values: Call In, Call Out, Interim.	10	String
CallType	The type of device used to create the event. Values: TELEPHONY, MOBILE, FVV, MANUAL, OTHER. Additional values for this field may be added.	20	String
ProcedureCode	HCPCS Code. Actual values for each payer/program/service to be determined during implementation. This value is not validated – it is based on the worker's entry during the call.	5	String
ClientIdentifierOnCall	Client ID entered or selected on Sandata EVV Event. This value is not validated – it is based on the worker's entry during the call.	10	String
ServiceEnteredOnCall	Service selected on the Call. Mapped to the appropriate HCPCS code. This value is not validated – it is based on the worker's entry during the call.	5	String
MobileLogin	Log in for GPS device.	64	String
VisitLocation	Location of the visit defined by the schedule or selected by the user.	64	String
VisitNotes	From the Sandata mobile application. Visit notes entered during the visit by the worker.	4000	String
CallLatitude	GPS Latitude recorded during event. Latitude has a range of -90 to 90 with a 15 digit precision	19	Decimal
CallLongitude	GPS Longitude recorded during event. Longitude has a range of -180 to 180 with a 15 digit precision	20	Decimal
TelephonyPIN	PIN for telephony.	9	String
CallTimeZone	Call time zone – if different that the client's default.	64	Timezone
OriginatingPhoneNumber	Originating phone number for telephony.	10	String
RecordUpdatedBy	The unique identifier of the user, system or process that made the change. This value could also be a system process in which case it will be identified. i.e. If the call was entered manually, the user or user identifier entering the manual call.	100	String

Column Name	Description	Max Length	Type
RecordUpdateDateTime	If the call was entered manually, the date/time of the entry.	20	DateTime
GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group. This value may not be provided by 3rd party EVV systems.	6	String

9.3 Visit - Tasks (VISIT_TASKS)

Provided if task collection is in use.

Column Name	Description	Max Length	Type
VisitKey	Visit identifier in the Sandata system.	50	String
TaskID	Task id, this task id must map to the Task IDs used for the agency in the Sandata system.	64	String
TaskReading	Task reading	10	String
TaskRefused	Did the client refuse the specific task. true/false	5	Boolean
TaskUnit	Task unit. Units that are used when collecting the tasks assuming readings are in use.	8	String
CallKey	Call identifier in the Sandata system. If the task was entered on a specific call, this value will be included.	50	String
RecordUpdatedBy	The unique identifier of the user, system or process that made the change. This value could also be a system process in which case it will be identified. Blank if captured during actual call. i.e. If the task was entered manually, the user or user identifier entering the task.	100	String
RecordUpdateDateTime	If the task was entered manually, the date/time of the entry. Blank if captured during actual call.	20	DateTime

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 36 of 44
Date: 8/12/2019

9.4 Visit - Exceptions (VISIT_EXCP)

Exceptions will be provided within the Visit information being sent. The information provided below is based on the exceptions currently applied to the visit. A visit can have zero to many exceptions. All exceptions associated with the visit at that point in time will be supplied. If they have been acknowledged, it will be noted here. VisitKey is unique throughout the Sandata system and will be assigned during 3rd party EVV system import as required. Uniqueness is defined as VisitKey + ExceptionID although there COULD be duplicates if for some reason the same exception is applied, then acknowledged then applied again.

Column Name	Description	Max Length	Type
VisitKey	Visit identifier in the Sandata system.	50	String
ExceptionID	ID for the exception being acknowledged. Exact exceptions in use for programs will be contained in the companion guide developed during implementation.	2	String
ExceptionAcknowledged	true/false	5	Boolean

9.5 Visit - Historical Visit Changes (VISIT_CHANGES)

Within the visit being sent, a visit could have one or more changes that have been manually applied. For each visit change, these data are the details of the change(s) made. Multiple or duplicate rows may be exported if a particular field is exported several times and/or changes are reversed. VisitKey is unique throughout the Sandata system and will be assigned during 3rd party EVV system import as required. The Primary Key for Visit_Changes is "VisitKey"+"ChangeID" +"RecordUpdateDateTime"

Column Name	Description	Max Length	Type
VisitKey	Visit identifier in the Sandata system.	50	String
ChangeID	The unique identifier of the change that is being sent. These can be used denote the order in which changes were made to the visit although they are not sequential. See Section 8.4 for possible values for this field.	50	String
ChangeType	The type of change being applied: A (Add), C (Change), M (Merge).	1	String
SequenceID	The Third Party visit sequence ID to which the change applied. This can be numeric or the date and time of the change depending on the 3rd party implementation of the Alt EVV specification.	50	String

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 37 of 44
Date: 8/12/2019

Column Name	Description	Max Length	Type
VisitChangeExternalID	Change identifier in the external system if applicable.	50	String
ChangeMadeBy	The unique identifier of the user, system or process that made the change.	64	String
ChangeDateTime	Change made date and time based on external interfaces. To the second.	20	DateTime
RecordUpdateDateTime	Date and time change applied in Sandata system. To the second.	20	DateTime
ReasonCode	Reason Code selected. Reason codes will be determined during implementation. It is possible that some changes may not require a reason code.	4	String
ChangeReasonMemo	Reason/Description of the change being made entered by the user.	256	String
ResolutionCode	Resolution Codes if in use. Resolution codes will be determined during implementation.	4	String
VisitChangeLogDetails	Snapshot of full visit record at the time of change.	1000	String

9.6 Visit – Claim Stack Requests (VISITS_CLAIMST)

For programs utilizing Claims Validation. The segment is included if there have been any fulfilled claims stack requests. If present, there may be one or more requests for each VisitKey. The TransactionID noted below will be based on the information sent by the adjudication system. This Identifier, along with the Individual, service, and start and end times, can be used to link back to the provider submitted information (via portal or 837). Only those requests where a visit was identified will be returned to the Payer/State Warehouse. Based on Claims Validation v1.0 only and only available if Claims Validation enabled for program. Uniqueness is defined as VisitKey + TransactionID + BatchID.

Column Name	Description	Max Length	Type
VisitKey	Visit identifier in the Sandata system.	50	String
TransactionID	Unique identifier for the request generated by the payer.	50	String
BatchID	Unique identifier for the request generated by the payer.	50	String
ICN	An Internal Control Number (ICN) is a unique, 13-digit identification number assigned to every claim in order to distinguish it from all other claims received by the system.	13	Integer
DetailLineNumber	Detail Line Number. A sequential and unique line number of each detail line within the claim.	99	Integer
ClientMedicaidID	The ID assigned by the State Medicaid agency for the patient.	64	String
Service	Service provided. This is the billable procedure code. For most programs, it is the HCPCS number.	5	String
Modifier1	First modifier if applicable.	3	String
Modifier2	Second modifier if applicable.	3	String
Modifier3	Third modifier if applicable.	3	String
Modifier4	Fourth modifier if applicable.	3	String
GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group.	6	String
Units	Units requested by and being returned to the adjudication system. For example, for 15 minute units, the maximum expected value is 96 (24 hours @ 4 units per hour).	16	Decimal
VisitStartDateTime	Requested date and time in.	20	DateTime
VisitEndDateTime	Requested date and time out.	20	DateTime
ResponseDateTime	Date and time response as generated by Sandata	20	DateTime

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 39 of 44
Date: 8/12/2019

10 Appendix

10.1 Legend

Legend	
Field Name	**Other possible Naming**
Client	Individual Member Patient Recipient
Employee	Caregiver Consumer Directed Worker Home Health Aide Staff Worker
Provider	Agency Third Party Admin (TPA)
Payer	Admission Contract Insurance Company Managed Care Organization (MCO) State
Contract	Program Program Code
HCPCS	Bill Code Procedure Code Service

10.2 Acronyms and Definitions

Term	Definition
AKA	Also Known As
API	Application Programming Interface
GMT	Greenwich Mean Time
HTTP	Hyper Text Transfer Protocol
TBD	To Be Determined
UTC	Universal Time Coordinated

10.3 Time Zone List

This is the common list of timezones in use. If your area is not covered by this list please contact Sandata support to discuss accepting additional timezone values. Please note that the value sent must exactly match the value and case shown.

Text Value	Daylight Saving
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
Canada/Atlantic	Active
Canada/Central	Active
Canada/East-Saskatchewan	Inactive
Canada/Eastern	Active

Text Value	Daylight Saving
Canada/Mountain	Active
Canada/Newfoundland	Active
Canada/Pacific	Active
Canada/Saskatchewan	Active
Canada/Yukon	Active
America/Puerto_Rico	Inactive

10.4 ChangeID Values

The following is a representative list. Additional values will be added to this list over time and based on program needs. Not all values will be used for every implementation.

ChangeID	Description
10010	Visit – Update Client
10011	Visit - Update Employee
10012	Visit - Assign Call to Visit
10013	Visit - Update Payroll Hours
10014	Visit - Update Payroll Hours via Single-Click
10015	Visit - Update Memo
10016	Visit - Add Visit
10018	Visit - Update Do Not Export Flag
10020	Visit - Assign Schedule to Visit
10021	Visit - Update Schedule
10023	Visit - Add Task to Visit
10024	Visit - Update Task
10025	Visit - Delete Task
10026	Visit - Add Contract/Payer
10027	Visit - Merge Visits
10029	Visit - Update Omit Visit Flag
10030	Visit - Update Known Client
10031	Visit - Update Known Employee
10032	Visit - Update Payroll Hours via Override of Exported Hours
10035	Visit - Manual Override Client Visit Verification
10063	Visit - Update Bill Hours

OpenEVV-Data Warehouse - v7.3 FINAL.docx
Proprietary and Confidential Information of Sandata Technologies, LLC
Page 42 of 44
Date: 8/12/2019

ChangeID	Description
10064	Visit - Update Bill Hours via Single-Click
10065	Visit - Update Bill Hours via Override of Exported Hours
10066	Visit - Update Adjusted Hours
10067	Visit - Approve Visit
10068	Visit - Update Service
10105	Visit Exception - Acknowledge Unscheduled Visits
10106	Visit Exception - Acknowledge Unmatched Payroll and Scheduled Hours
10107	Visit Exception - Acknowledge Payroll Hours less than Scheduled Hours
10108	Visit Exception - Acknowledge Actual Hours more than Scheduled Hours
10109	Visit Exception - Acknowledge Rejected Visits
10110	Visit Exception - Acknowledge Missing Tasks
10112	Visit Exception - Acknowledge Invalid Contract / Payer
10113	Visit Exception - Acknowledge Employee Replacement
10114	Visit Exception - Acknowledge Missing Contract / Payer
10115	Visit Exception - Acknowledge Unmatched Client ID / Phone
10116	Visit Exception - Acknowledge Missing Procedure Code
10118	Visit Exception - Acknowledge Late In-Call
10119	Visit Exception - Acknowledge Early Out-Call
10120	Visit Exception - Acknowledge Short Visit
10121	Visit Exception - Acknowledge No Show
10123	Visit Exception - Acknowledge Missing Service
10125	Visit Exception - Acknowledge GPS Distance Exception
10126	Visit Exception - Acknowledge Employee Speaker Verification Exception
10127	Visit Exception - Acknowledge Client Speaker Verification Exception
10128	Visit Exception - Acknowledge Visit Verification Exception
10130	Visit Exception - Acknowledge Client Speaker Verification Bypassed
10131	Visit Exception - Acknowledge Unmatched Billing and Scheduled Hours
10132	Visit Exception - Acknowledge Billing Hours less than Scheduled Hours
10133	Visit Exception - Acknowledge Unmatched Billing and Payroll Hours
10134	Visit Exception - Acknowledge Unauthorized Service
10135	Visit Exception - Acknowledge Extraneous Calls

ChangeID	Description
10136	Visit Exception - Acknowledge Client Eligibility
10137	Visit Exception - Acknowledge Payroll Hours greater than Maximum Allowed Hours
10139	Visit Exception - Acknowledge Client Signature Exception
10140	Visit Exception - Acknowledge Service Verification Exception
13560	Manual Call - Add
13570	Manual Call - Add to Specified Visit
17501	Visit - Add Visit
17502	Visit - Update Visit