MatrixCare Home Care

Sandata EVV 3rd Party Integration

for Rhode Island EOHHS

User Guide

Version: 2020 R3

MatrixCare™ Home Care Sandata EVV 3rd Party Integration for Rhode Island EOHHS User Guide

This document was written for use with MatrixCare Home Care 2020 R3 (v1.65) or greater.

© June 2020 MatrixCare is a registered trademark of MatrixCare. All rights reserved. Other products are trademarks or registered trademarks of their respective holders.

This document and the software it represents is the exclusive property of MatrixCare. Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may in whole or in part be reproduced, stored in a retrieval system, or transmitted in any form, or any means electronic or mechanical including photocopying and recording for any purpose other than the purchaser's personal use without prior consent, in writing, from MatrixCare.

Companies, names, and data used in examples herein are fictitious unless otherwise noted.

MatrixCare
11555 Heron Bay Blvd
Suite 301
Coral Springs, FL 33076
Support: 561-447-7111
Support E-mail: hc-support@matrixcare.com

Main: 561-447-7111
Fax: 954-827-0558
URL: http://www.matrixcare.com

Table of Contents

Sandata EVV 3rd Party Integration for Rhode Island EOHHS.....1

Setup Considerations.....1

Initial Payer Configuration Fields.....1

Initial/Ongoing Caregiver Configuration.....3

Initial/Ongoing Client Configuration.....3

Payer Configuration to Avoid.....3

Permission Configuration.....3

Approve Sandata EVV Schedules in Telephony Review and then Complete in Office Schedules.....4

Exception Acknowledgement and the Reason Code Prompt in Telephony Review.....7

Exception Acknowledgement.....7

Reason Codes.....11

Clients, Caregivers and Schedules Eligible for Push to Sandata.....14

Data Transmitted to Sandata.....15

Information Flow for Updates – Clients, Caregivers, Clock In/Out, Schedules.....17

Updates to C Status Schedules which previously passed to Sandata.....17

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

Sandata EVV 3rd Party Integration for Rhode Island EOHHS

MatrixCare Home Care integrates with Sandata, the provider selected by the State of Rhode Island Executive Office of Health and Human Services (EOHHS) in order to aggregate EVV data as required by the 21st Century CURES Act. Agencies may utilize the MatrixCare Home Care Mobile solution for EVV needs.

Important! Sandata does not support Multiple Services. Customers should not schedule Multiple Services with Sandata payers.

Note: Rhode Island does not send Tasks to Sandata. Tasks are not sent with this state's integration.

Agencies utilizing the Sandata 3rd Party Integration for Rhode Island EOHHS will:

- Complete initial setup of important areas of MatrixCare required by Sandata.
- Capture clock in, clock out, and GPS data via caregivers utilizing the MatrixCare Mobile solution, which now includes the offline mobile apps for Android and iOS.
- Create and finalize in MatrixCare and submit those invoices to payers and/or clearinghouses as required by the payers. Sandata is an aggregator but not a claims processor, so billing continues independent from the Sandata integration.
- Client, caregiver, and schedule data will push to Sandata behind the scenes, without further user intervention.

If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. The MatrixCare Implementation team will enable the Sandata integration and assist you with configuration.

Note: You will need to supply your Sandata Rhode Island EOHHS Test Credentials so that MatrixCare can submit a test file on your behalf.

Setup Considerations

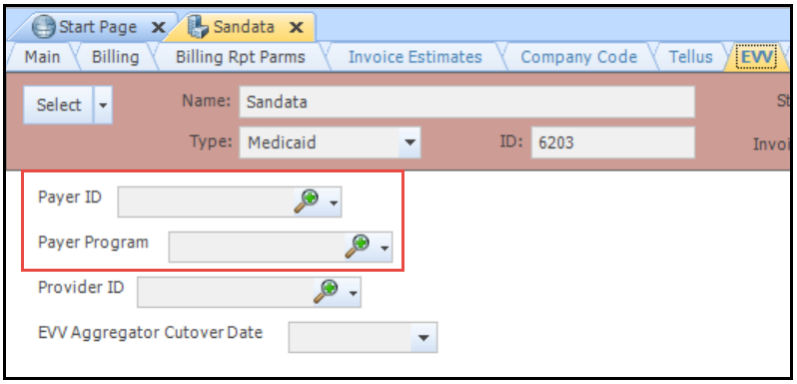
It is important to ensure that user-entered data is present and configured correctly prior to initializing the integration. Listed below are specific fields which must be configured in different areas of MatrixCare. Keep in mind that the Payer configuration will likely be completed once, but Caregiver and Client data will be continually entered as caregivers are hired and clients commence service.

Initial Payer Configuration Fields

- EVV tab – Enter in the appropriate Payer ID and Payer Program. These values are state-specific. For further information on accepted Payer ID and Payer Program names, please refer to your state specific Sandata guide.

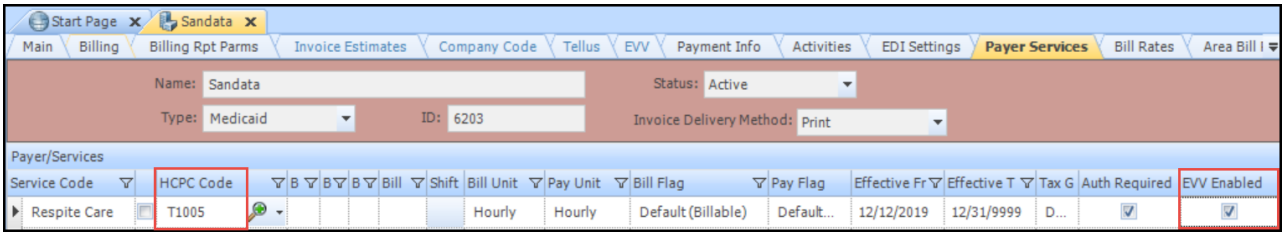
Note: The Provider ID and EVV Aggregator Cutover Date fields are not required for the Sandata integration.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

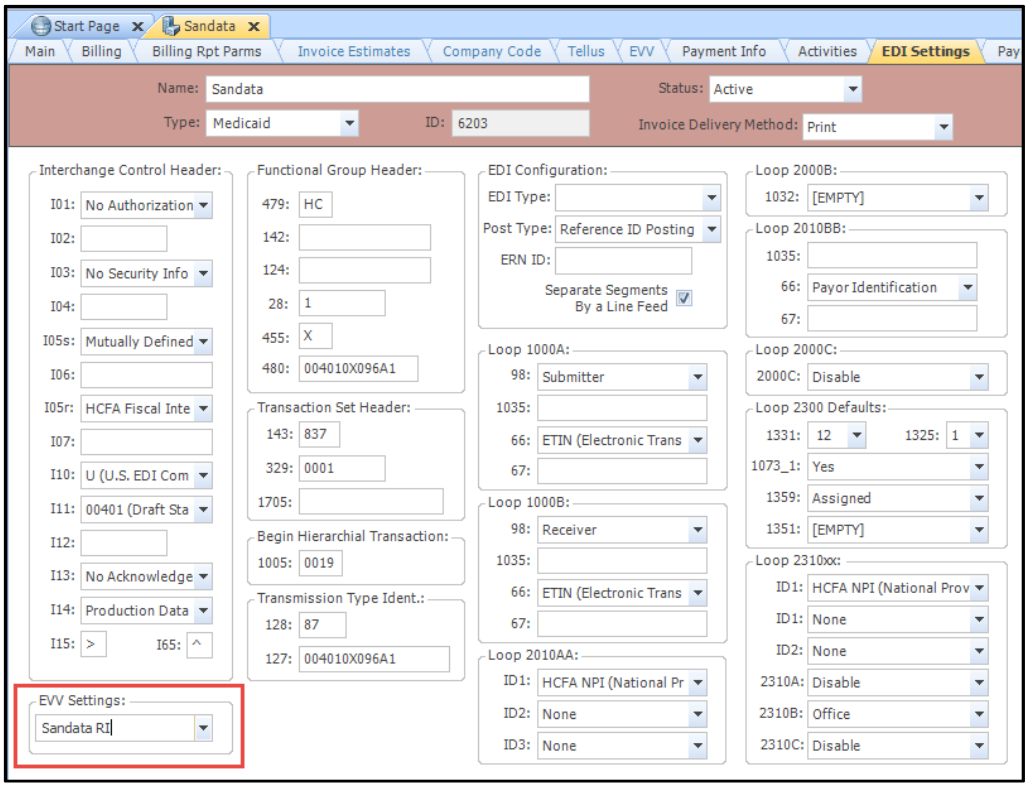


- Payer Services tab – Enter the HCPCs and Modifiers as needed for all services provided. For further information on accepted HCPC and Modifiers, please refer to your state specific Sandata guide. Deselect **EVV Enabled** for any services which should *not* be sent to Sandata.

  Note: *Only schedules with EVV Enabled HCPCs will be passed to Sandata*.



- EDI Settings tab – Select the Sandata EVV aggregator.



© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

- Bill Rates tab – Enter bill rates for all services provided.

Initial/Ongoing Caregiver Configuration

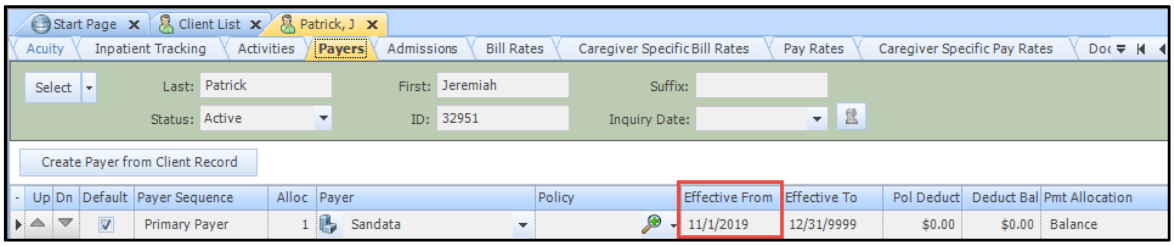
Ensure that all current caregivers, as well as any newly hired caregivers, have the required information entered.

- Main tab – First and Last Name
- Payroll tab – Social Security number. The masked SSN (five zeros plus the last 4 digits of the SSN) will pass to Sandata.

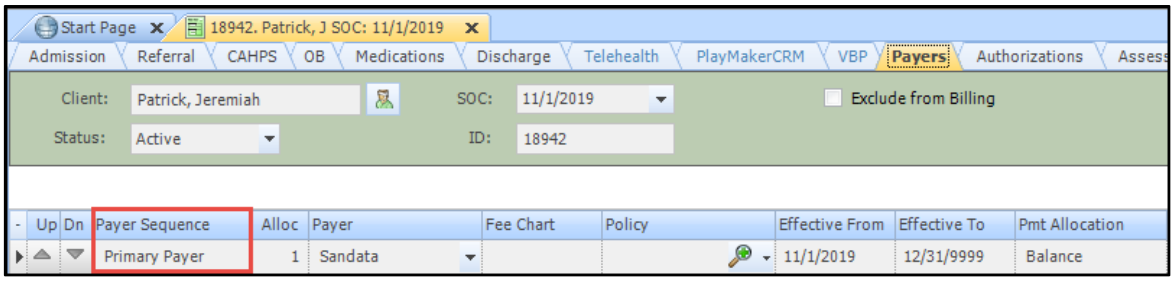
Initial/Ongoing Client Configuration

While certain client information is required, keep in mind that authorizations do not pass to Sandata from MatrixCare. It is recommended that users still enter in authorizations in MatrixCare to ensure that clients are not scheduled outside of authorization.

- Main tab – First and Last Name, HIC #, Address/City/State/Zip, geolocation of address, phone number (those marked as Home, Mobile, Work will be passed)
- Payer tab – Effective From date



- Admission Payer tab – Primary payer which is enabled for Sandata EVV.



Payer Configuration to Avoid

There are certain configurations which should not be used in conjunction with the Sandata EVV 3rd party integration.

- Sandata cannot accept Multiple Service schedules, so this configuration cannot be used with the Sandata integration.

Permission Configuration

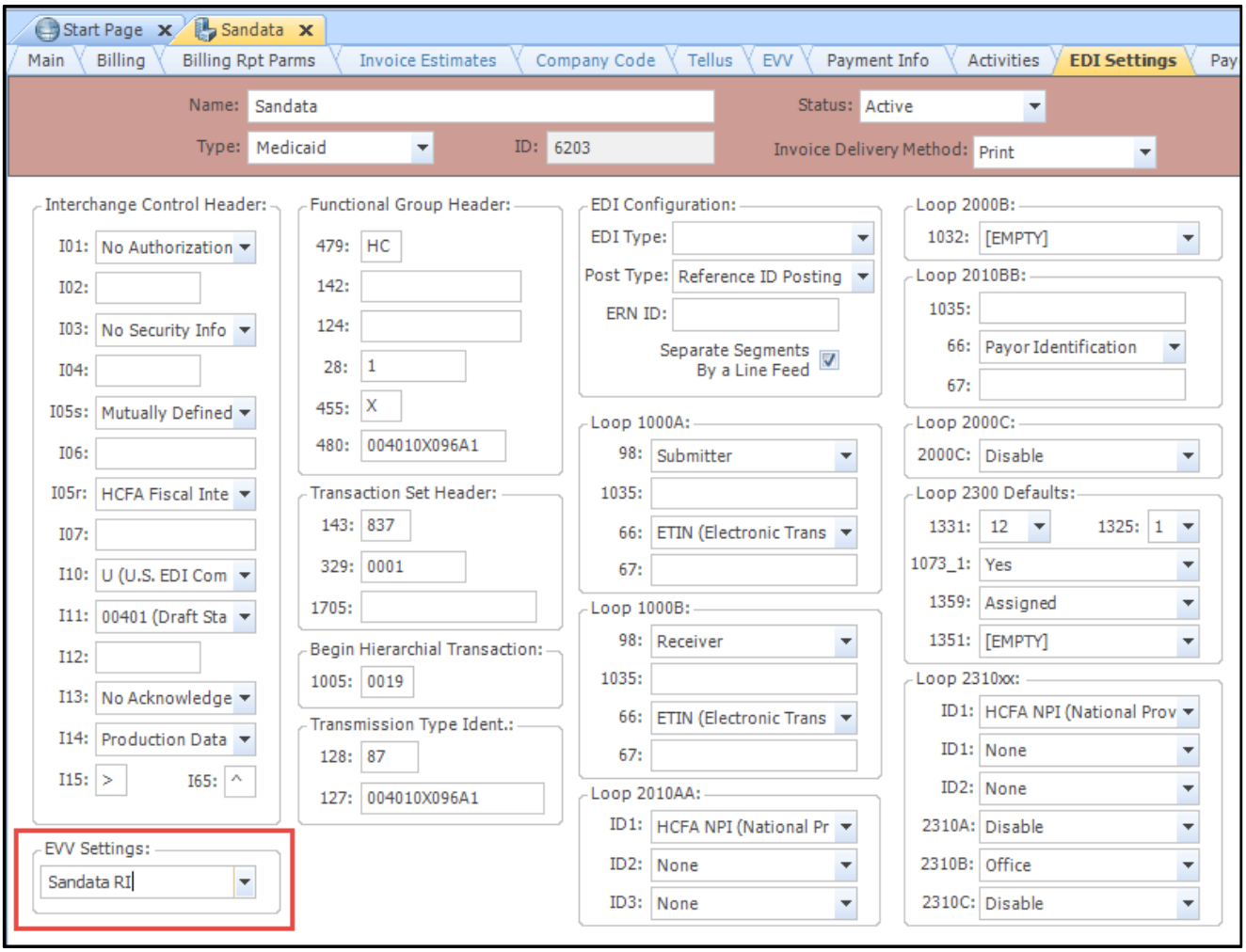
In order for users to view the Payers EVV tab, ensure that these users have the permission **Payers.EVV** added to the appropriate Permission Groups.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

Approve Sandata EVV Schedules in Telephony Review and then Complete in Office Schedules

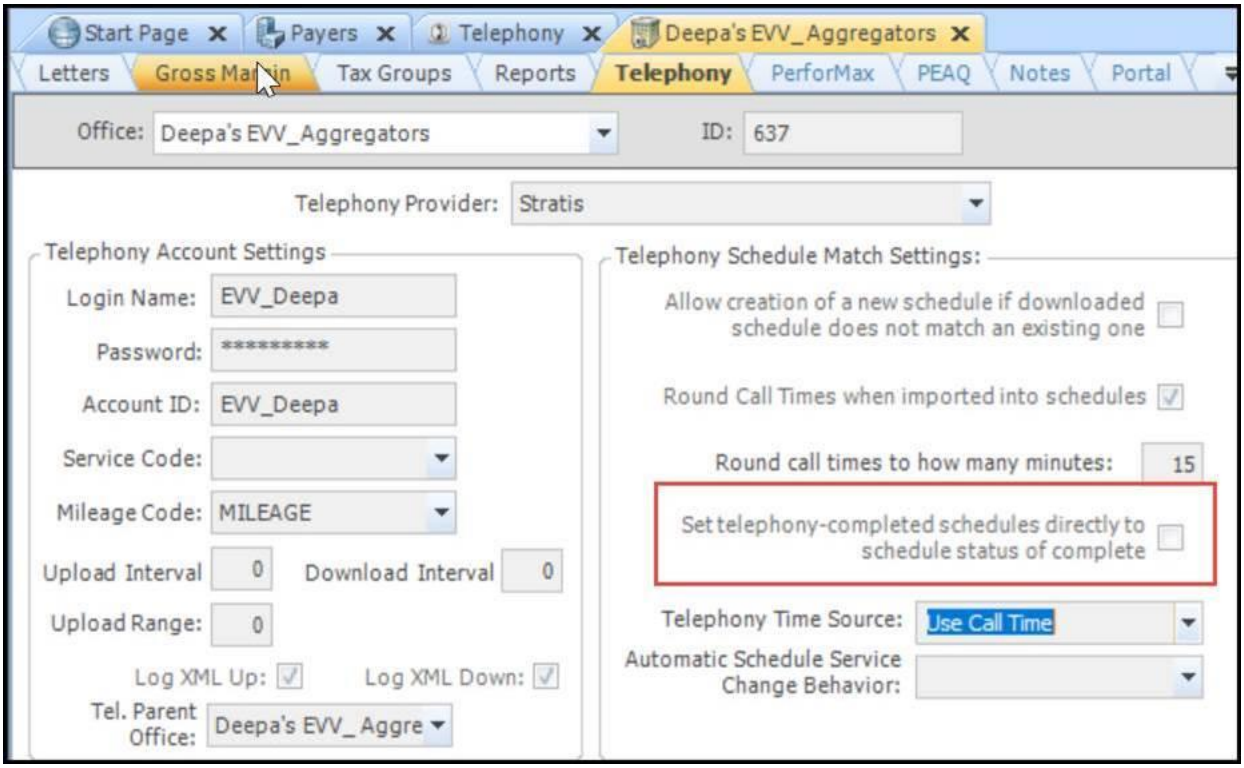
In order to be compliant with Sandata rules and state regulations, any schedule with a Sandata EVV enabled payer must be approved from within Telephony Review and then can be later completed from Office Schedules. From Telephony Review, users must view and acknowledge any exceptions that may arise so that those exceptions can be passed to Sandata.

When the payer is Sandata EVV enabled, then the EVV Settings field on the EDI Settings tab will have a Sandata state aggregator selected.

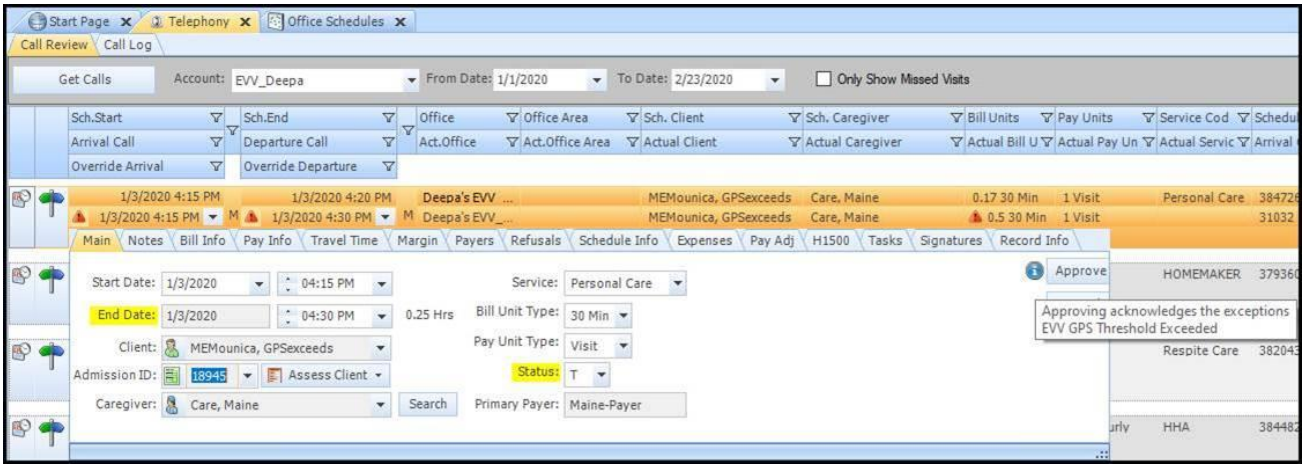


In this example, an agency has the Office Telephony tab set to set telephony-completed schedules to T status.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

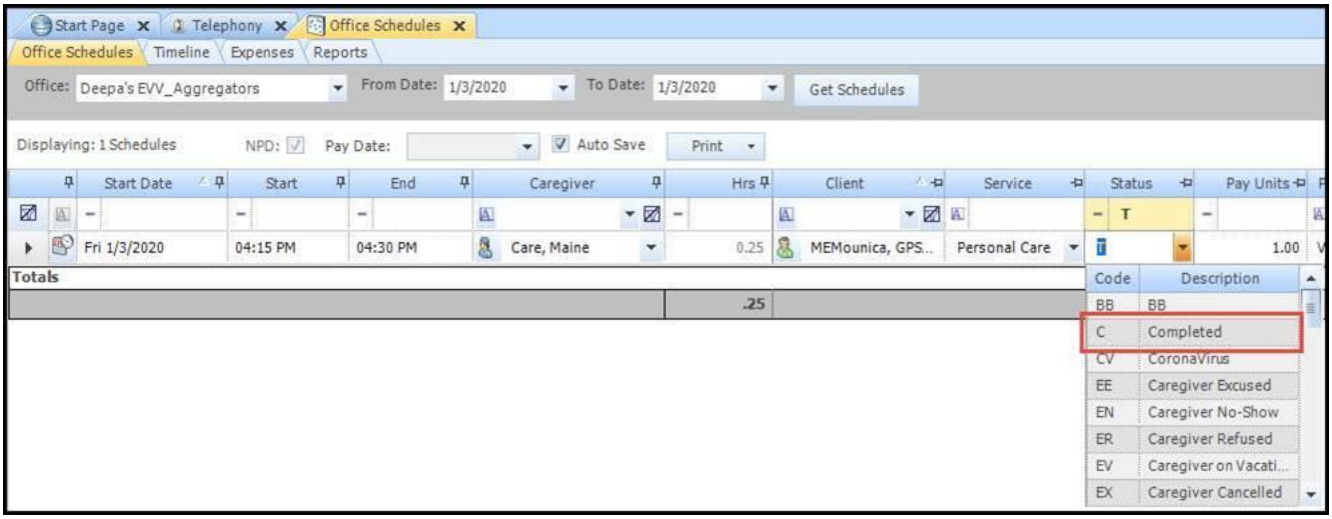


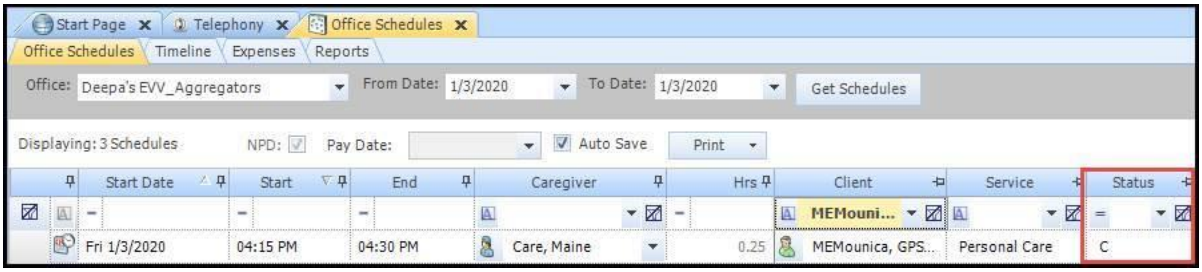
Sandata schedules in Telephony Review display any applicable exception flags and approving the schedule will change the status from S to T.



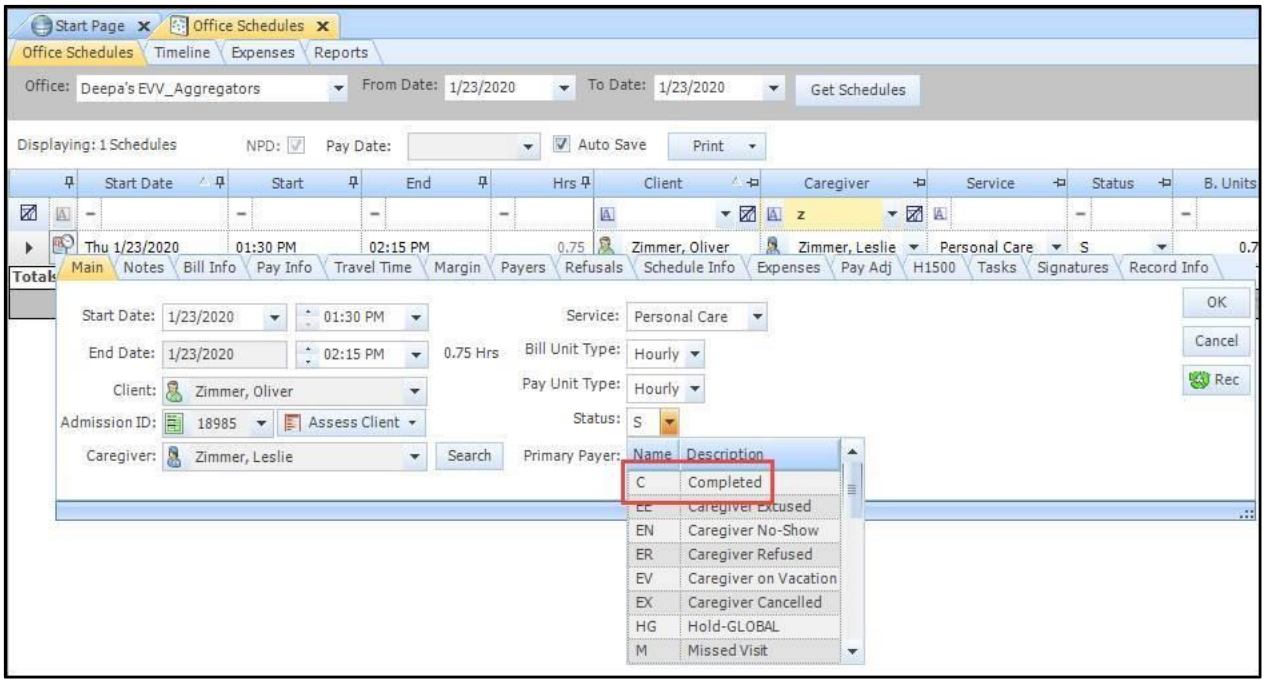
After the schedule has been approved, users can complete the schedule in Office Schedules.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only



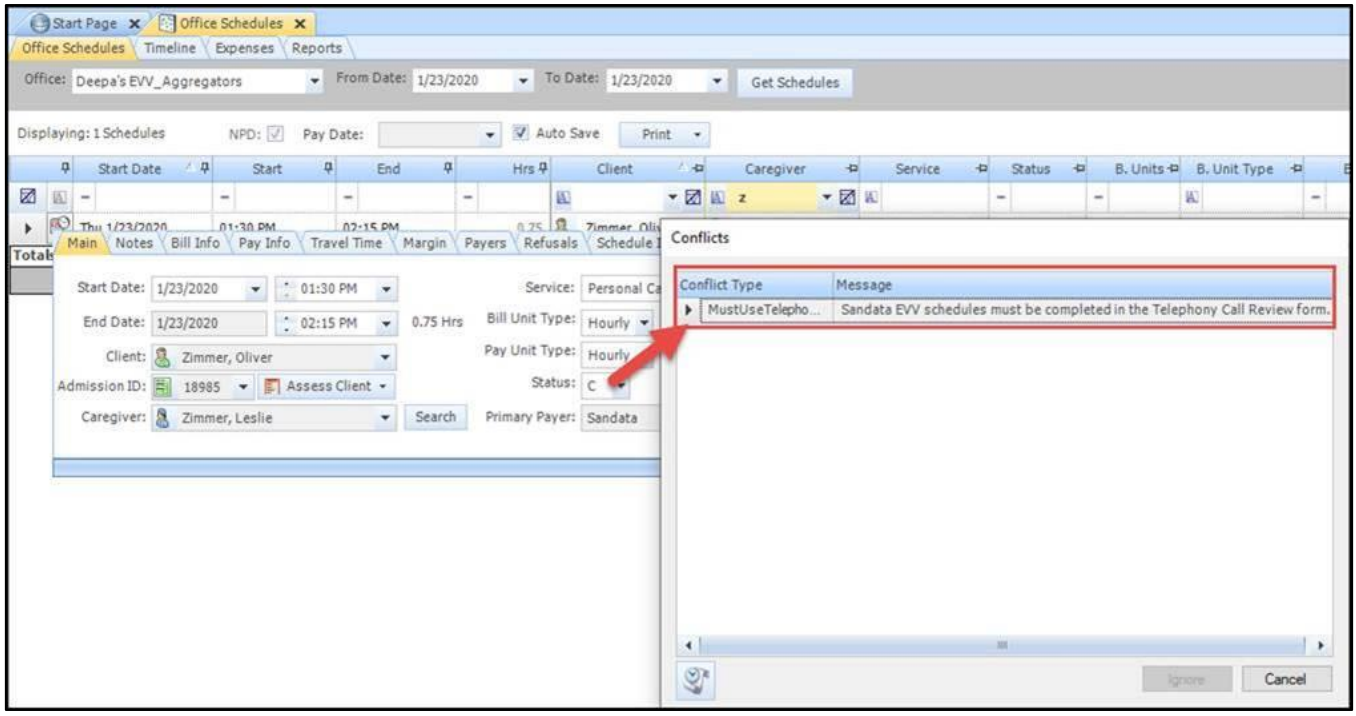


However, users are not able to change an S status Sandata schedule to C status in Office Schedules.



© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

When the schedule status is changed to C and the user clicks **OK**, then the Conflict box pops up to warn the user to complete the Sandata EVV schedule in Telephony Review. The user is not able to click Ignore, but instead must click Cancel and proceed to Telephony Review where the schedule can be completed.



Exception Acknowledgement and the Reason Code Prompt in Telephony Review

Caregivers should be clocking in and out from visits with clients. Ideally, the caregiver clocks in and out promptly using either mobile (with GPS location within a certain distance of the client geolocated home and client signature captured) or telephony. Additionally, those actual clock in and clock out values (rounded) are unaltered by either the caregiver (during the visit) or the back office user overriding the value in Telephony Call Review. When certain conditions are not met, then MatrixCare must send exceptions to Sandata once acknowledged by the user or must send reason codes once selected by the user.

Exception Acknowledgement

Each state integration of Sandata has certain exception events that require the user to acknowledge any exception and then that exception must be passed to Sandata. Because those exceptions must be acknowledged, telephony flags reflecting these exceptions are visible in Telephony Review. These flags will prevent schedules from automatically completing when those schedules have specific conditions present which must be acknowledged by the user.

Note: Exceptions are flagged *at the time the clock out is processed by MatrixCare*. In the event where the exception is later resolved (by the time the schedule is sent to Sandata), then the exception will not be transmitted.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

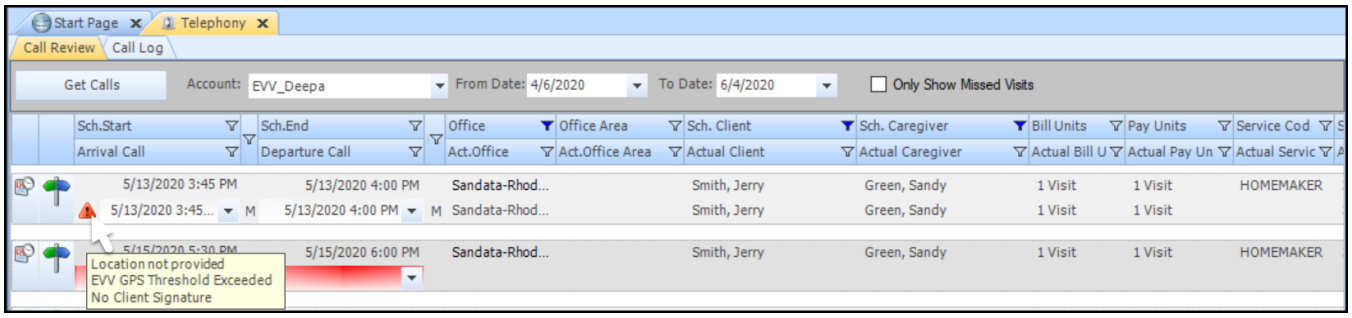
In the state of Rhode Island, the GPS Threshold Exceeded, Visit Without Any Calls, No In Call, and No Out Call must be sent when applicable.

- GPS Threshold Exceeded – The clock in and/or out location captured exceeds the state mandated distance when compared to the location of the client. Each state utilizing this exception determines its definition of acceptable distance.
- No In Call – This exception occurs when a caregiver fails to clock in for a Sandata schedule.
- No Out Call – This exception occurs when a caregiver fails to clock out for a Sandata schedule.
- Visit Without Any Calls – This exception occurs when a caregiver fails to both clock in or out of a Sandata schedule.

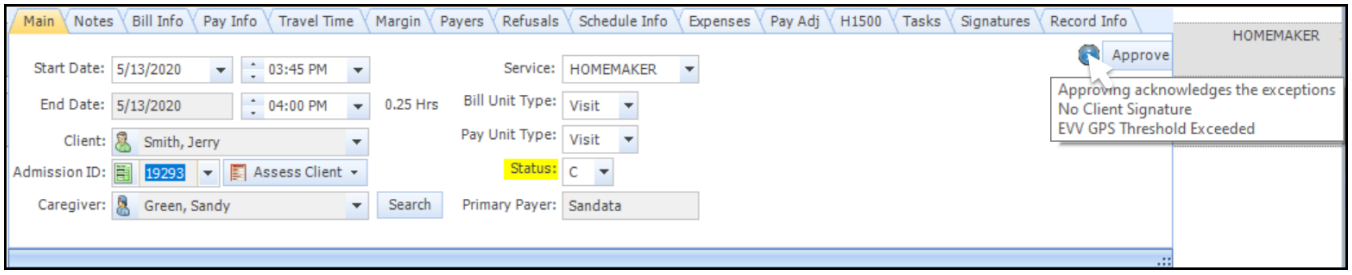
Telephony Flag – EVV GPS Threshold Exceeded

When call reconciliation is performed in Call Review, the user can see the EVV GPS Threshold Exceeded flag, along with any other possible applicable flags for the call.

In the Sandata integration for Rhode Island, the GPS clock in/out must be within .1 miles of the client's geolocated address.



After clicking the Schedule icon on the left, the Approval button now displays an informational icon directly to its left. Hovering over this informational icon displays any Sandata specific exceptions flagged on this schedule. Clicking Approve shows that the user is acknowledging those exceptions, and those exceptions are passed to Sandata.

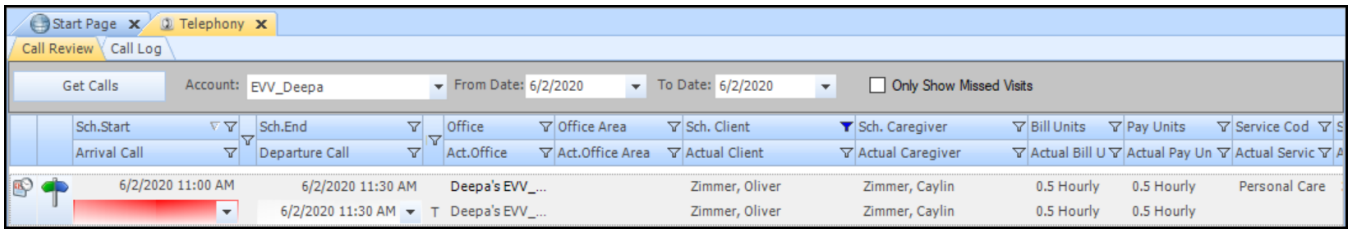


Telephony Flag – No In Call

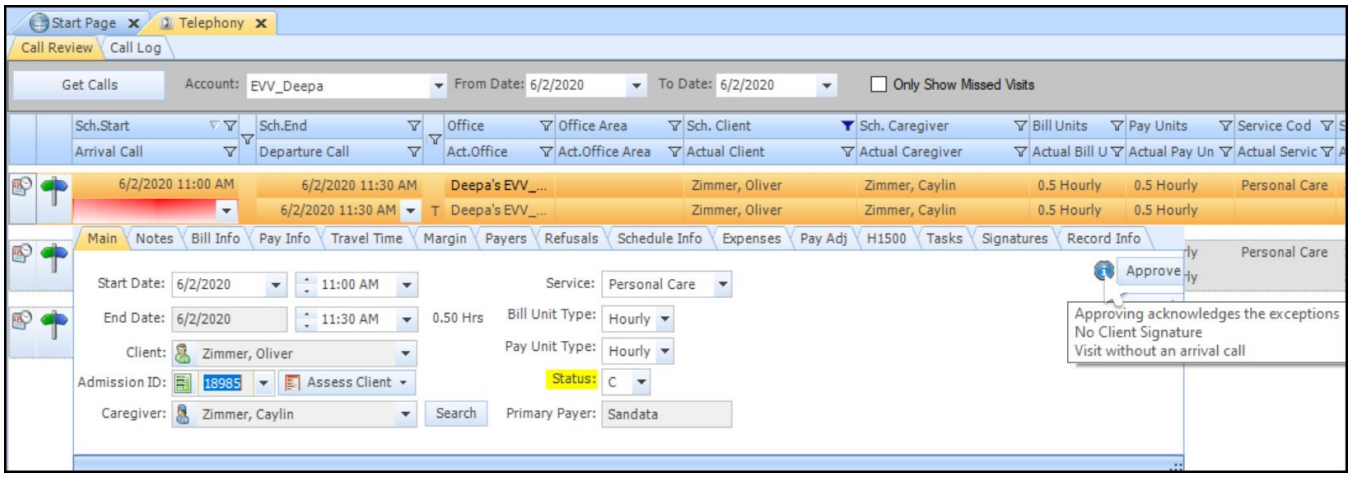
When call reconciliation is performed in Call Review, the user can see the No In Call flag, along with any other possible applicable flags and exceptions for the call. In this example, the caregiver has failed to clock in, but has clocked out of the schedule. This specific exception can only occur with telephony, as mobile forces the caregiver to clock in prior to clocking out.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

Note: The No In Call exception does not display a warning icon in the Telephony Review screen but displays the exception when hovering over the informational icon on the Schedule Details screen.



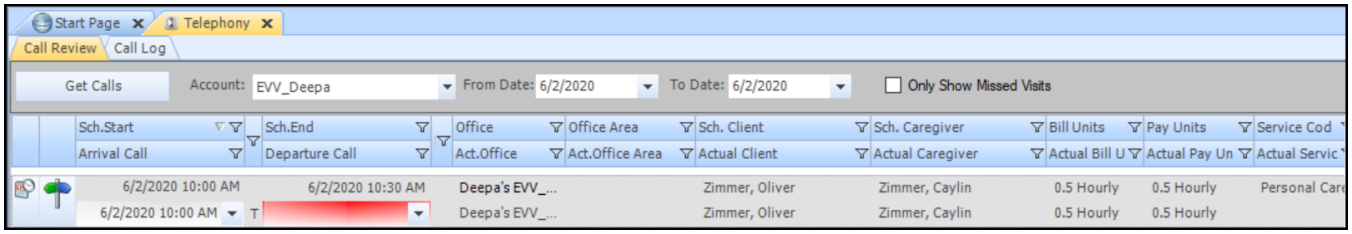
After clicking the Schedule icon on the left, the **OK** button now displays an informational icon directly to its left. Hovering over this informational icon displays any Sandata specific exceptions flagged on this schedule. Clicking Approve shows that the user is acknowledging those exceptions, and those exceptions are passed to Sandata.



Telephony Flag – No Out Call

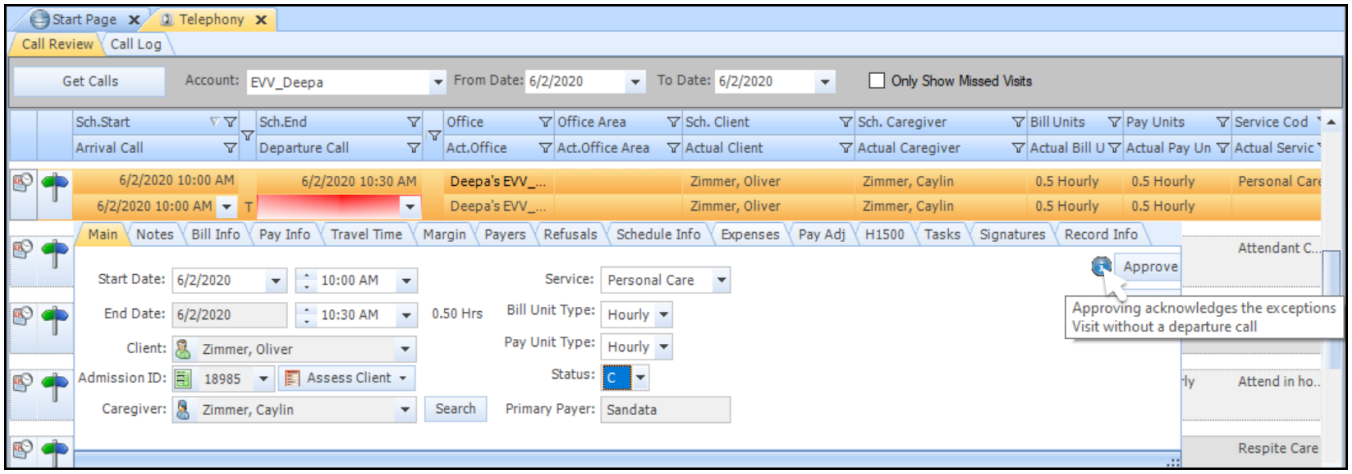
When call reconciliation is performed in Call Review, the user can see the No Out Call flag, along with any other possible applicable flags and exceptions for the call. In this example, the caregiver has failed to clock out, but has clocked in the schedule.

Note: The No Out Call exception does not display a warning icon in the Telephony Review screen but displays the exception when hovering over the informational icon on the Schedule Details screen.



After clicking the Schedule icon on the left, the Approve button now displays an informational icon directly to its left. Hovering over this informational icon displays any Sandata specific exceptions flagged on this schedule. The user must change the status to C (or T) in order to Approve the schedule. Clicking Approve shows that the user is acknowledging those exceptions, and those exceptions are passed to Sandata.

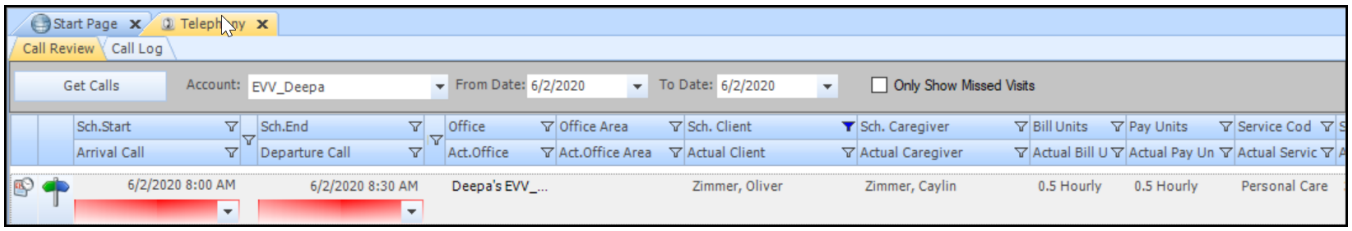
© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only



Telephony Flag – Visit Without Any Calls

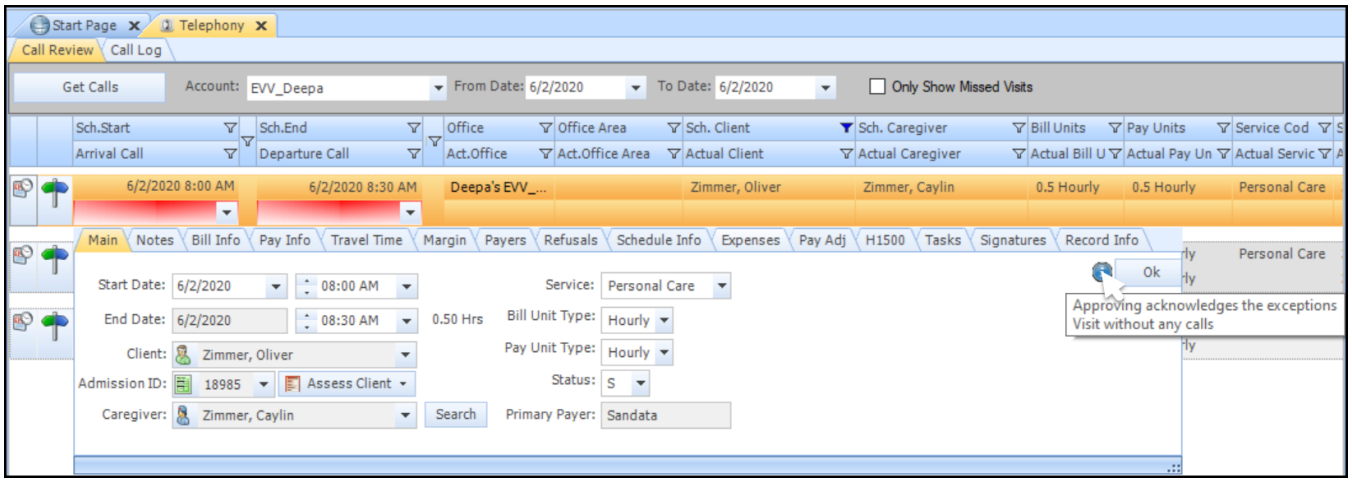
When call reconciliation is performed in Call Review, the user can see the No Out Call exception, along with any other possible applicable flags and exceptions for the call. In this example, the caregiver has failed to clock in or out of the schedule.

Note: The Visit Without Any Calls exception does not display a warning icon in the Telephony Review screen but displays the exception when hovering over the informational icon on the Schedule Details screen.



After clicking the Schedule icon on the left, the OK button now displays an informational icon directly to its left. Hovering over this informational icon displays any Sandata specific exceptions flagged on this schedule. The user must change the status to C (or T) in order to Approve the schedule. Clicking Approve shows that the user is acknowledging those exceptions, and those exceptions are passed to Sandata.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

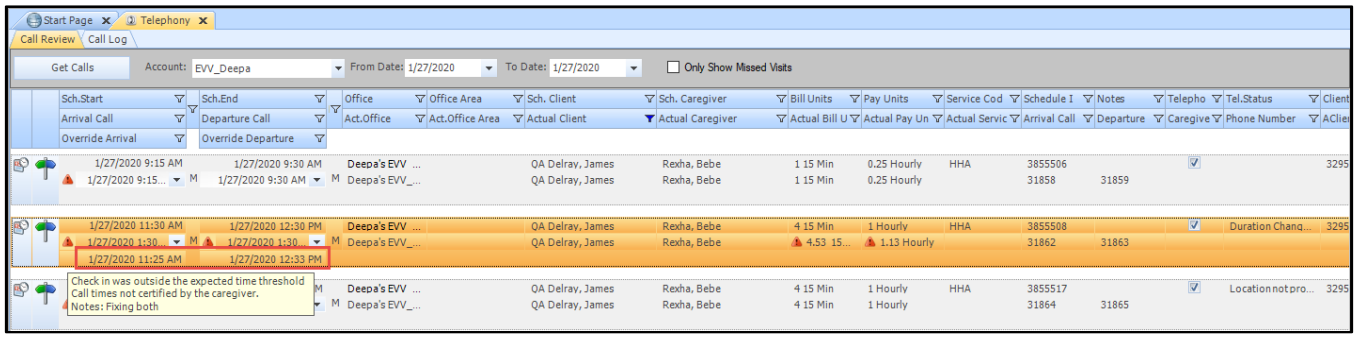


Reason Codes

Additionally, while in the Telephony Call Review screen, certain situations require that the user select a reason code which explains why certain changes have been made to a schedule. The reason code and the memo are both passed to Sandata. Two such situations include:

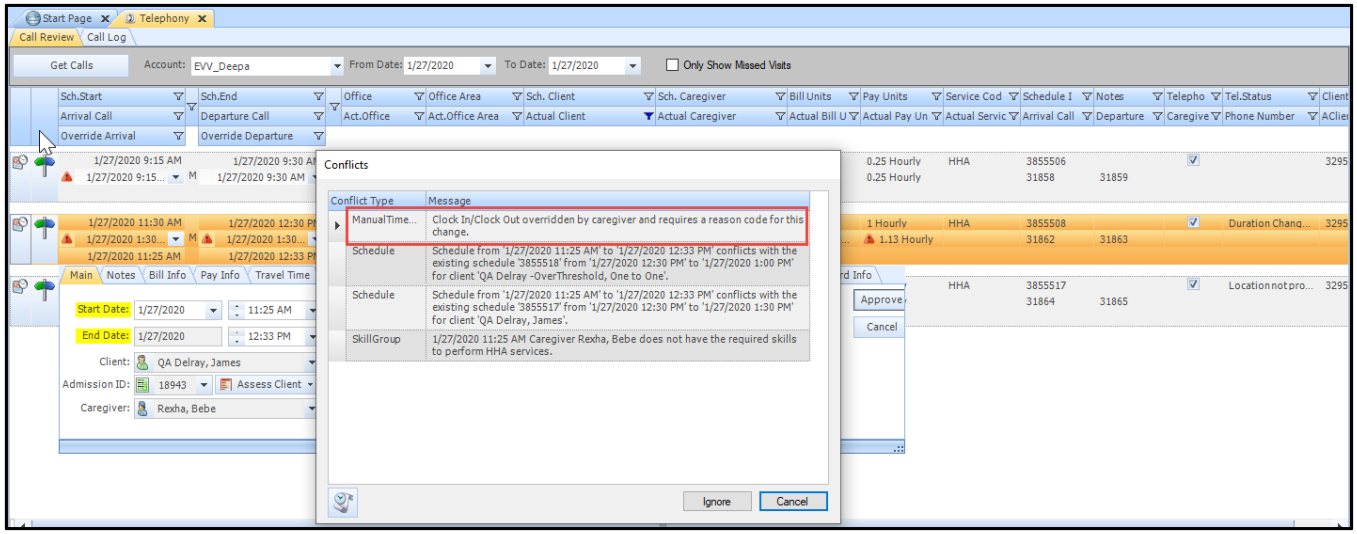
Caregiver override of clock in and/or out times

When a caregiver overrides a clock in and/or clock out while clocking out from a client schedule, users can see this in the Telephony Call Review screen.

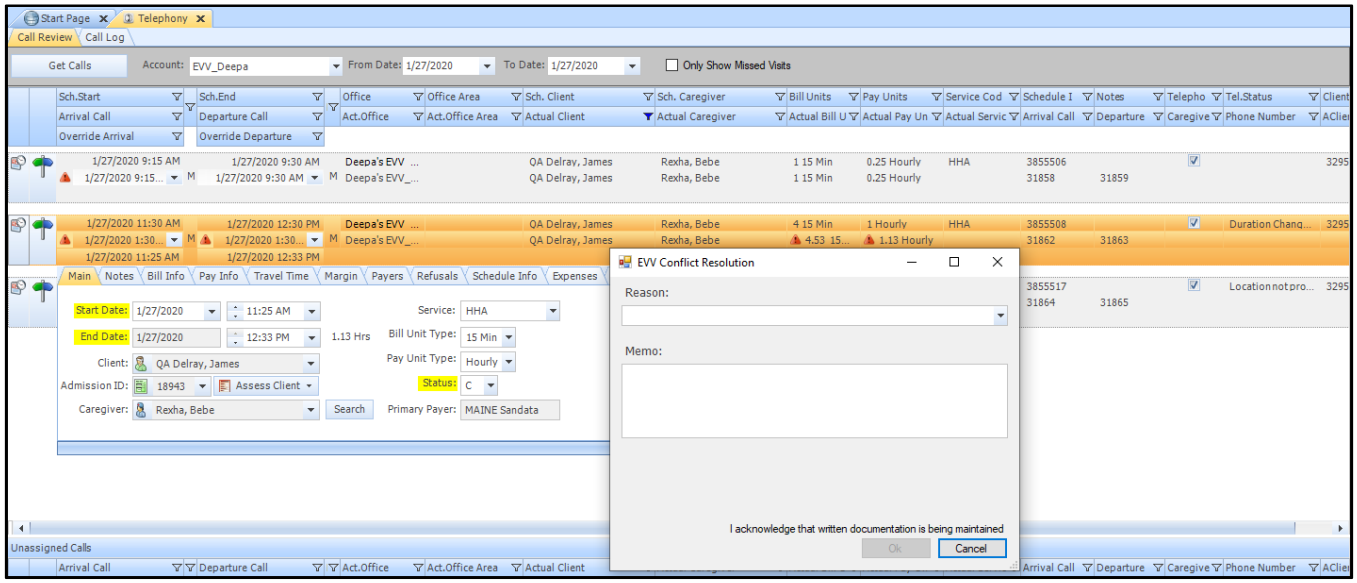


When the user clicks the Schedule icon, then clicks Approve, the Conflict message “Clock In/Clock Out overridden by caregiver and requires a reason code for this change.”

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

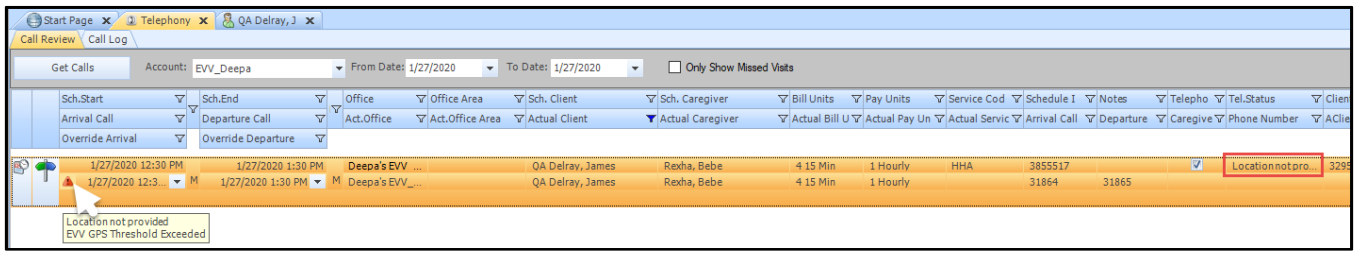


In order to proceed, the user must click Ignore and select a Reason Code from the drop down and enter in a memo code.



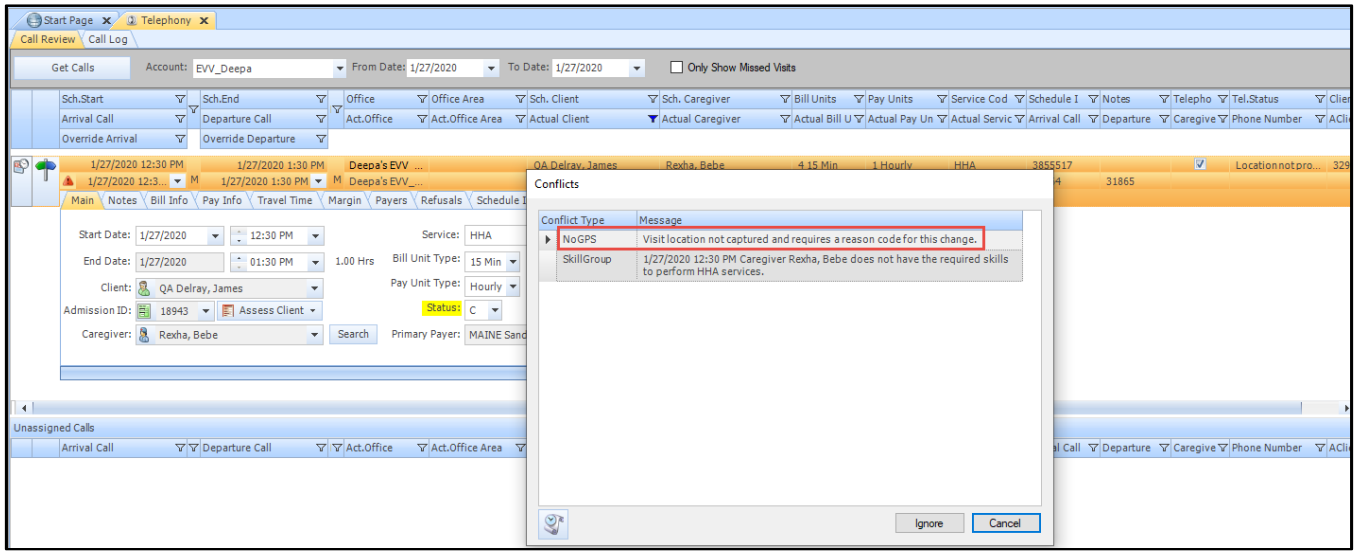
No GPS location on a mobile clock in/out

When a caregiver does not capture a GPS location during a mobile clock in and/or out, the telephony flag “Location not provided” displays.

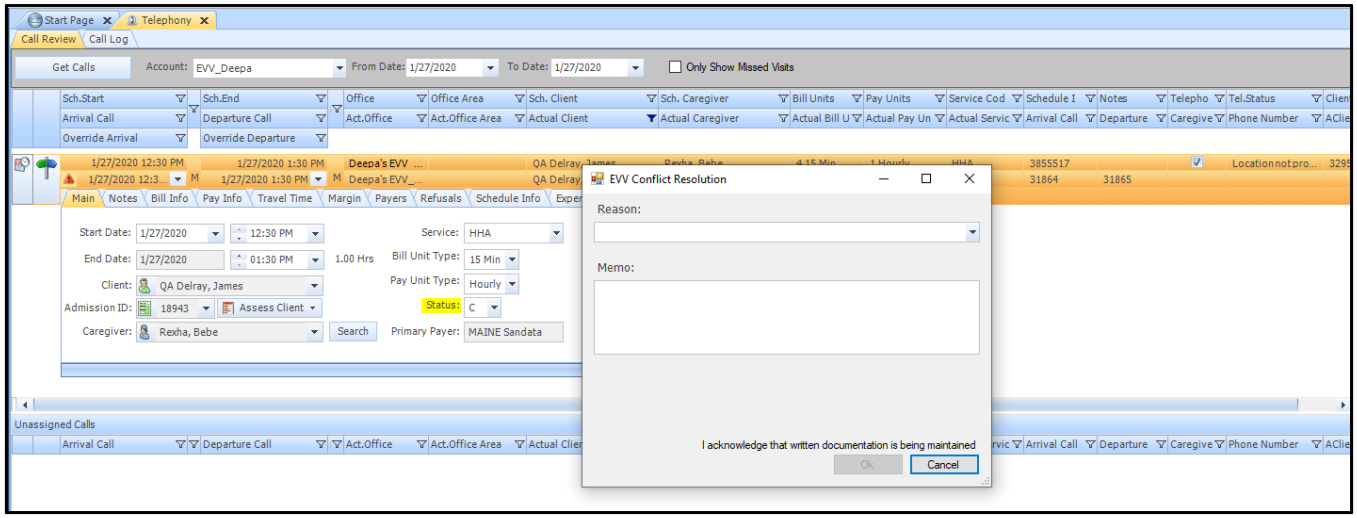


© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

When the user clicks the Schedule icon, then clicks Approve, the Conflict message “Visit location not captured and requires a reason code for this change.”



In order to proceed, the user must click Ignore and select a Reason Code from the drop down and enter in a memo code.



© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

The Reason Code and Descriptions are state specific. The Reason Codes for Rhode Island are as follows:

Code	Description
1	Client Cancel
2	Staff Cancel
3	Scheduling Error
4	Removed from home by family
5	Patient expired
6	Frequency orders changed
7	Patient in hospital
8	MD appt - not home
9	No answer to locked door
10	No call - No show
11	No orders - not billable
12	Duplicate Entry
13	Adj made, rebill to other Payor
14	Patient DC
15	Patient changed insurance
16	Patient/caregiver refused
30	Other

Clients, Caregivers and Schedules Eligible for Push to Sandata

Once the EVV Settings drop down is saved and the office has been enabled for the Sandata EVV 3rd party integration, then the appropriate data will be sent to Sandata in the background. The following outlines the specific circumstances in which data will be pushed to Sandata.

Clients

- Active Status
- Belongs to Office has been enabled for Sandata integration
- At least one admission with both Sandata-enabled primary payer and EVV-enabled HCPCs

Caregivers

- Active Status
- Caregiver or Caregiver/Staff Role
- Belongs to Office has been enabled for Sandata integration

Schedules

- Completed schedules
- Admission with both Sandata-enabled primary payer and EVV-enabled HCPCs
- Dates of service within the last 45 days

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

Data Transmitted to Sandata

Field Name	MatrixCare Location/Notes
Provider ID	N/A (received from Sandata)
Client ID	Client Main tab System ID
Client First and Last Name	Client Main tab First Name and Last Name
Client Medicaid ID	Client Main tab HIC #
Payer ID	Payer EVV tab Payer ID field
Payer Program	Payer EVV tab Payer Program field
Procedure Code	Payer Services tab HCPC field
Modifiers 1-4 (optional)	Payer Services tab Modifier fields
Client Status	Passes as Active (or Discharged if all admissions are Discharged status)
Effective Start Date	Client Payer tab Effective From field
Client Address	Client Address 1 and 2, City, State, Zip
Client Address Latitude	Geolocated client address required
Client Address Longitude	Geolocated client address required
Client Phone(s)	Client Main tab Phones
Employee SSN	Caregiver Payroll tab SSN field (masked – displays last 4 digits only)
Employee First and Last Name	Caregiver Main tab First and Last Name fields
Employee Email	Optional - Caregiver Main tab Email 1 field
Visit ID	Schedule ID
Call Date Time	Clock in and/or out date and time
Schedule Start Time	Historical Start Time of schedule
Schedule End Time	Historical End Time of Schedule
Adj In/Out Date Time	When the caregiver's clock in or clock out time (after rounding) does not match the Start/End times on the schedule used for

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

Field Name	MatrixCare Location/Notes
	payroll/billing, the adjusted in and/or out times are sent and the EVV times from the caregiver are not sent. This can occur when the schedule times are overridden in the back office and do not match the caregiver's clock in or out time (after rounding).
Mobile Login	Username of caregiver who clocked in/out via mobile
Call Latitude	Latitude of mobile call when GPS is captured
Call Longitude	Longitude of mobile call when GPS is captured
Telephony PIN	Caregiver HR tab Telephony ID field
Originating Phone Number	Phone number used when clocking in/out via telephony
GPS Threshold Exception	Exception is sent when caregiver clock in and/or out is outside of state accepted distance threshold.
No In Call Exception	Exception is sent when the caregiver fails to clock in for a visit.
No Out Call Exception	Exception is sent when the caregiver fails to clock out for a visit.
Visit Without Any Calls Exception	Exception is sent when the caregiver fails to clock in or out for a visit.
Change Made By	Username who made changes to fields sent to Sandata after the C status schedule was already sent to Sandata. Schedule fields affected include Schedule Start Date/Time, Schedule End Date/Time, Caregiver, or Service Code.
Change Date Time	Date/time of changes to a C status schedule after the schedule was passed to Sandata.
Reason Code	State-specific reason code selected by user when either certain situations occur (caregiver override of clock in and/or out time or no GPS captured on a mobile clock in and/or out) or upon changing C status schedule which had already passed to Sandata
Reason Code Memo	Memo which accompanies the Reason Code.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

Information Flow for Updates – Clients, Caregivers, Clock In/Out, Schedules

Of course, once the clients, caregivers, clock in/out, and C status schedules are sent to Sandata, those records could be changed during the normal course of time. Changes to certain fields will trigger updates to Sandata.

Clients

- Updates to the Client Main tab will prompt the client data to be resent to Sandata.

Caregivers

- Updates to the Caregiver Main tab will prompt the caregiver data to be resent to Sandata.

Schedules

- Schedules and related clock in/out data is initially pushed to Sandata when set to C status.
- Back office user updates to Sandata required fields on C status schedules previously passed to Sandata will prompt the user to enter a Reason Code and memo in order to make changes.
    - Fields affected include Schedule Start Date/Time, Schedule End Date/Time, Schedule Caregiver, or Schedule Service Code.

Updates to C Status Schedules which previously passed to Sandata

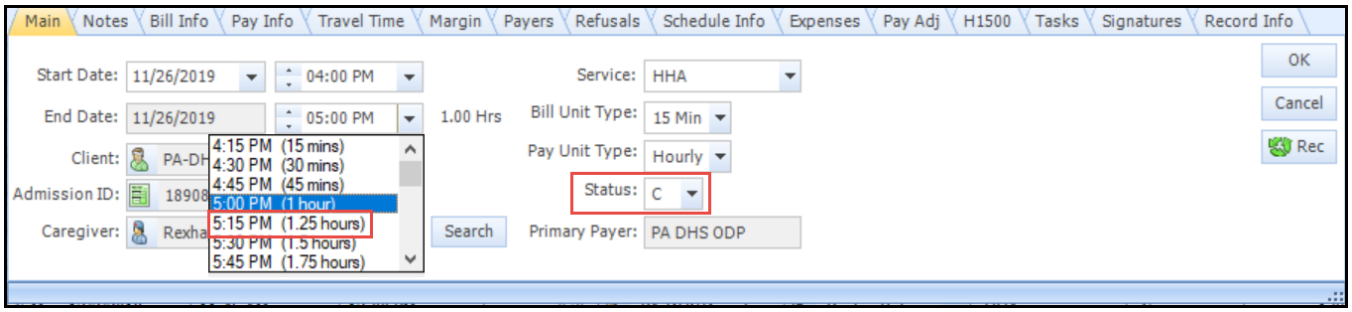
One requirement of Sandata is to pass Reason Codes when there are changes to a schedule after that schedule has been uploaded to Sandata. When a back office user makes a change to a C status schedule which has previously passed to Sandata, then that user will be prompted to enter a Reason Code and memo in order to save the change. Fields affected include:

- Schedule Start Date/Time
- Schedule End Date/Time
- Schedule Caregiver
- Schedule Service Code

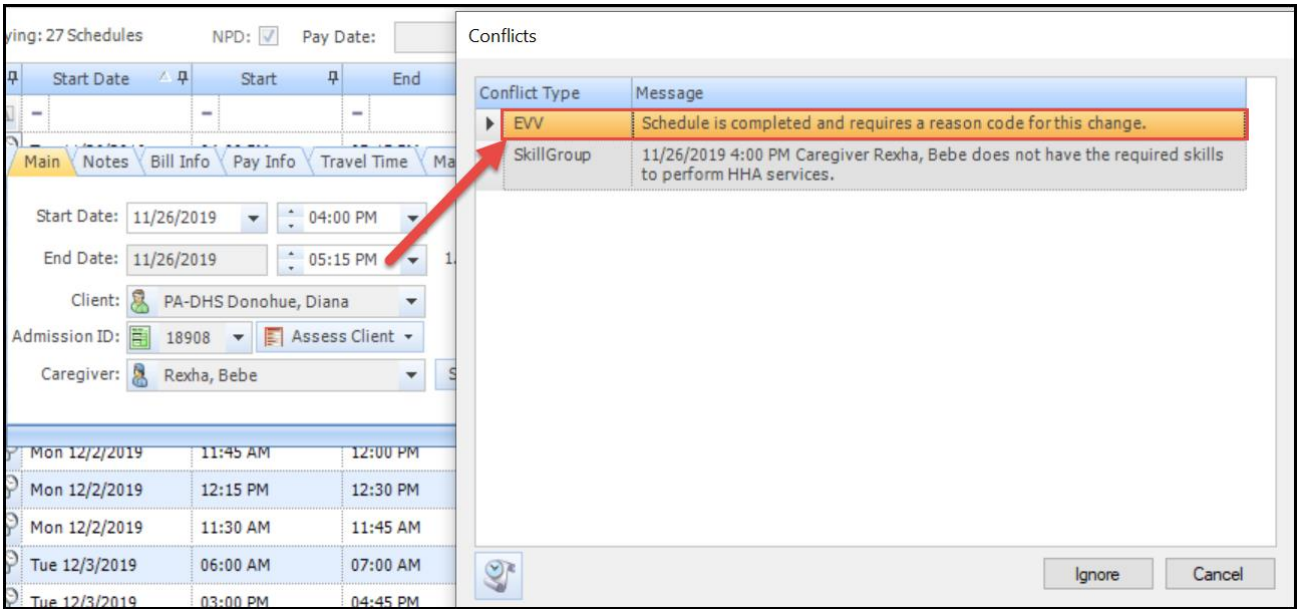
If the schedule has not yet transferred to Sandata, then you will not be prompted to enter a Reason Code. Schedules push approximately once per hour to Sandata.

In this example, the back office user is changing a C status schedule end time from 5:00 pm to 5:15 pm.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only

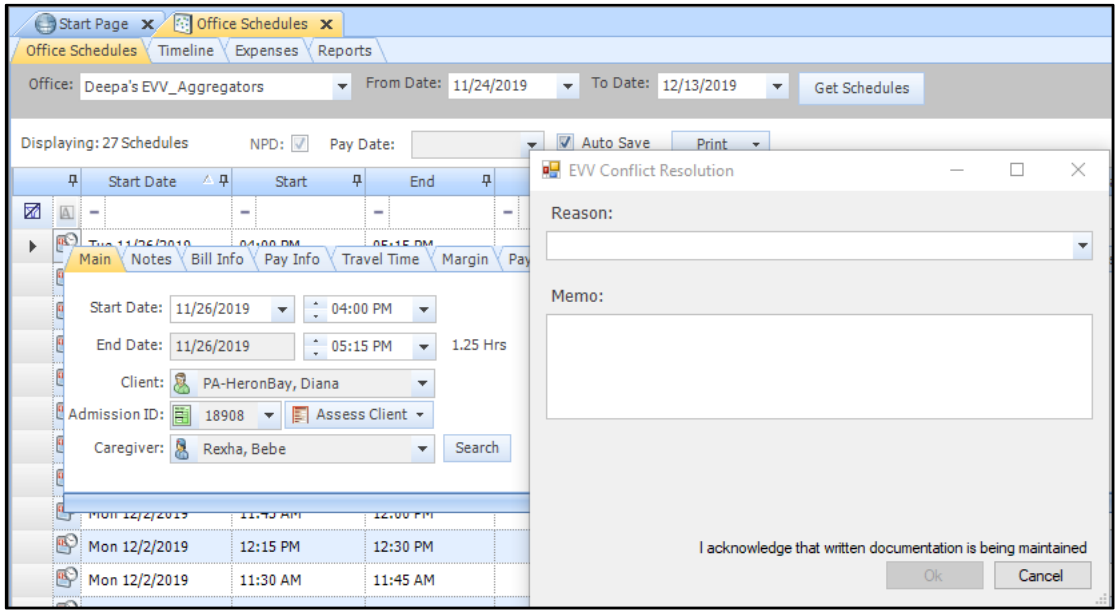


When the new end time is selected, click **OK**, the EVV Conflict will appear along with any other normal conflicts that may occur.



In this situation, you must either click **Cancel** and reverse the change or click **Ignore**, which will prompt the EVV Conflict Resolution dialog box.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only



The Reason Code and Descriptions are state specific. The Reason Codes for Rhode Island are as follows:

Code	Description
1	Client Cancel
2	Staff Cancel
3	Scheduling Error
4	Removed from home by family
5	Patient expired
6	Frequency orders changed
7	Patient in hospital
8	MD appt - not home
9	No answer to locked door
10	No call - No show
11	No orders - not billable
12	Duplicate Entry
13	Adj made, rebill to other Payor
14	Patient DC
15	Patient changed insurance
16	Patient/caregiver refused
30	Other

Users must select a Reason Code from the drop down and enter in a memo, then click **OK** to save the EVV Conflict Resolution dialog box. The updated schedule information (including the Reason Code, user that made the change, Memo field, date/time of the change, and that written documentation is being maintained) will be passed to Sandata.

© 2020 MatrixCare, Inc. All Rights Reserved, For Licensed MatrixCare Users Only