

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

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

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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 statespecific. 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.

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	Payer Pro	gram			<i>»</i> -						
1	Provider	ID		ß) -	-					
	EVV Aggr	egator	Cutover D	ate		•					

• 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.

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Respite Care	005	۰ 🔍					Hourly	Hourly	C	efault (Bill	able)	Default	12/12/2019	12/31/9999	D	V	

• EDI Settings tab – Select the Sandata EVV aggregator.

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]	127: 004010/09041	ID1: HCFA N	JPI (National Pr 🔻	2310A: [Disable	-
EVV Se	ettings:		ID2: None	•	2310B: (Office	-
Sanua			ID3: None		2310C:	Disable	-

• 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

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	Acuity	Inpatie	ent Tracking 🛛 🛛 Acti	ivities)	Payer	rs Admissi	ions 🗸 Bill Ra	tes 🔪	Caregiver Specif	ic Bill Rates	Pay Rates 🛛	Caregiver Spe	cific Pay Rat	es 🛛 Doc 🗢 🕅
	Select	•	Last: Patrick			First:	Jeremiah		Suffi	x:				
			Status: Active		•	ID:	32951		Inquiry Dat	e:	- 2			
ľ	Create	e Payer fr	om Client Record											
I	- Up Dn	Default	Payer Sequence	Alloc	Payer			Policy	/	Effective From	Effective To	Pol Deduct	Deduct Bal	Pmt Allocation
	▶ ▲ ▼		Primary Payer	1	b s	Sandata			<i>»</i> -	11/1/2019	12/31/9999	\$0.00	\$0.00	Balance

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

	6)s	tart	Page	e 🗙 🗒 18942	. Patric	k, J SOC: 11/1/2019	x						
[Ad	mis	sic	n (Referral CAI	HPS 🗸 (OB Medications	1)ischarge 🗸 Te	lehealth	PlayMaker	скм 🗸 VBP 🗸	Payers Auth	orizations 🗸 Asses
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►		-	~	Prin	nary Payer	1	Sandata	-			<i>»</i> -	11/1/2019	12/31/9999	Balance

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.

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.

Star	t Page 🗙 📴 Sandata	×		
/ Main X	Billing \ Billing Rpt Pa	rms (Invoice Estimates (Con	mpany Code 🌾 Tellus 🌾 EVV 🌾 Payment	Info Activities EDI Settings Pay
	Name: Sand	lata	Status: Act	ive 🔻
	Type: Med	icaid 🔻 ID: 6	203 Invoice Deliver	y Method: Print 🗸
_ Interc	hange Control Header: –	- Functional Group Header:	EDI Configuration:	_ Loop 2000B:
I01:	No Authorization -	479: HC	EDI Type:	1032: [EMPTY]
I02:		142:	Post Type: Reference ID Posting 🔻	Loop 2010BB:
I03:	No Security Info 🔻	124:	ERN ID:	1035:
I04:		28: 1	Separate Segments 🛛 🕅 By a Line Feed	66: Payor Identification
I05s:	Mutually Defined 🔻	455: X	-Loop 1000A:	6/:
I06:		480: 004010X096A1	98: Submitter	2000C: Disable
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I10:	U (U.S. EDI Com 🔻	329: 0001	67:	1073_1: Yes 💌
I11:	00401 (Draft Sta 🔻	1705:	Loop 1000B:	1359: Assigned 🔻
I12:		Begin Hierarchial Transaction:	98: Receiver	1351: [EMPTY]
I13:	No Acknowledge 🔻	1005: 0019	1035:	ID1: HCFA NPI (National Prov
I14:	Production Data 💌	Transmission Type Ident.:	67:	ID1: None
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		127. 004010X030A1	ID1: HCFA NPI (National Pr 🔻	2310A: Disable 💌
EVV S	ettings:		ID2: None 🔻	2310B: Office 💌
			ID3: None 💌	2310C: Disable

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

Start Page	🗙 🕞 Payers 🗙 🧕 Telep	ohony 3	🗙 🗊 Deepa's E	VV_Aggregato	rs X	
Letters Gross	s Mar yin 🔰 Tax Groups 🗸 R	eports	Telephony	PerforMax V	PEAQ \ Notes \	Portal
Office: Deep	a's EVV_Aggregators		• ID: 6	37		
	Telephony Provider:	Stratis			•	
_ Telephony Accou	unt Settings		Telephony Sch	edule Match Set	ttings:	
Login Name:	EVV_Deepa		Allow crea	ation of a new s	chedule if downlo	aded
Password:	*******		sch	ledule does not	match an existin	g one —
Account ID:	EVV_Deepa		Round Ca	ll Times when in	nported into sche	dules 🔽
Service Code:	-		Rour	nd call times to	how many minute	es: 15
Mileage Code: Upload Interval	MILEAGE	0	Settelep	phony-complete sched	ed schedules dire lule status of con	ctly to 🔲
Upload Range:	0 L Up: V Log XML Dow	n: 🗸	Telephony Automatic Sch	/ Time Source: hedule Service	Use Call Time	•
Tel. Parent Office:	Deepa's EVV_Aggre -		Cita	inge benavior.		

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

Sta	nt Page 🗙 🔍	Telephony	x 🔄 0	ffice Schedul	es x												
Call Rev	riew Call Log	(
G	et Calls	Account:	EVV_Deep	a	👻 Fi	rom Date: 1	/1/2020	👻 To Date	2/23/2020	•	Only S	how Mis	sed Visits				
	Sch.Start	V	Sch.End		V _ Of	fice	♥ Office	Area 🛛 🏹 Sch	n. Client	V	7 Sch. Caregi	ver	♥ Bill Units	Pay Unit	s V	Service Cod 🛛	7 Schedu
	Arrival Call	Δ ,	Departur	e Call	V Ad	t.Office	▼ Act.0f	fice Area 🛛 🖓 Act	tual Client	2	Actual Care	giver	V Actual Bill U	J V Actual Pa	ay Un 🔽 /	Actual Servic V	7 Arrival
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	1/3/202	0 4:15 PM	1	/3/2020 4:20	PM De	eepa's EVV		M	EMounica, GPS	Sexceeds	Care, Main	e	0.17 30 Mi	n 1Visit		Personal Care	38472
	1/3/2020 4:	:15 PM - M	1/3/	2020 4:30 PM	M De	eepa's EVV_	-	М	EMounica, GPS	Sexceeds	Care, Main	e	▲ 0.5 30 M	lin 1 Visit			31032
	Main Notes	Bill Info	Pay Info	Travel Tim	e 🗸 Margir	Payers	Refusals	Schedule Info	Expenses	Pay Adj	H1500 T	Tasks	Signatures Recor	d Info			
19 🔶	Start Date:	1/3/2020	• :	04:15 PM	•		Service:	Personal Care	•					Approve		HOMEMAKER	37936
	End Date:	1/3/2020	1	04:30 PM	• 0.25	Hrs Bill (Jnit Type:	30 Min 👻						Approving EVV GPS Th	acknowl reshold l	edges the exc Exceeded	eptions
😰 🐢	Client:	& MEMour	nica, GPSex	ceeds	•	Pay L	Jnit Type:	Visit 🔻								Respite Care	382043
1	Admission ID:	18945	• 🖪 A	ssess Client	-		Status:	Т 👻									
	Caregiver:	🖁 Care, Ma	aine		• Sear	ch Prima	ary Payer:	Maine-Payer									
😰 🌩		146													urly	нна	384483
1																	

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

Off	ice:	Deepa's EVV_Ag	grega	ators		From D	Date: 1/3/	2020	👻 To Da	ite: j	1/3/2	2020	•	Get Schedules						
Disp	olayin	ng: 1 Schedules		NPD: 🔽	Pay	Date:			👻 🔽 Auto Si	ave		Print 🔹								
		Start Date	Хţ	Start	Ŗ	En	¢ b		Caregiver	ą	Ĩ	Hrs 🛱		Client 4	Service	-12	Stat	us ⊀	Pay I	Jnits 4
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•	P	Fri 1/3/2020		04:15 PM		04:30 P	M	8	Care, Maine	*		0.25	8	MEMounica, GPS	Personal Care	+	ū	-		1.00
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Off)Sta	t Page 🗙 🎽 🖞	Telep	hony ×	Off	ice Schedules	x									
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100	1032	Deepus evv_P	(ggreg				1/0/202		1,0,2020		Get Schedules					
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		-		-		-	A	- 🛛	1 -	A	MEMouni	• 🛛	A	• 🗷	=	- 🗹
	P	Fri 1/3/2020		04:15 PM		04:30 PM	8	Care, Maine 🔻	0.25	8	MEMounica, G	PS	Personal Ca	re	С	

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

Start Page 🗙 🔄 Office Schedules 🗙	
Office Schedules Timeline Expenses Reports	
Office: Deepa's EVV_Aggregators From Date: 1/23/2020 To Da	te: 1/23/2020 👻 Get Schedules
Displaying: 1 Schedules NPD: 🗸 Pay Date:	ve Print -
부 Start Date / 부 Start 부 End 부 Hrs 부	Client
	▼ 🕅 Z 🔹 🐨 🔲
Thu 1/23/2020 01:30 PM 02:15 PM 0.75 & Totak Main Notes Bill Info Pay Info Travel Time Margin Payers Refusals	Zimmer, Oliver Zimmer, Leslie - Personal Care - S - 0.7 Schedule Info Expenses Pay Adj H1500 Tasks Signatures Record Info
Start Date: 1/23/2020 V 01:30 PM V Service:	Personal Care 👻
End Date: 1/23/2020 22:15 PM 👻 0.75 Hrs Bill Unit Type:	Hourly Cancel
Client: 🐰 Zimmer, Oliver 👻 Pay Unit Type:	Hourly 👻
Admission ID: 📰 18985 👻 🛐 Assess Client 👻 Status:	S 💌
Caregiver: 🙎 Zimmer, Leslie 👻 Search Primary Payer:	Name Description
	C Completed
	ee caregiver excused
	EN Caregiver No-Show
	ER Caregiver Refused
	EV Caregiver on Vacation
	EX Caregiver Cancelled
	HG Hold-GLOBAL
	M MISSEd VISIt

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.

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.

) Sta	rt Page 🗙 🛈 Telephor	ıy	x													
	G	et Calls Account	: I	EVV_Deepa	,	 From Date: 4/6 	j/2020 🔻	То	Date: 6/4/2020	Ŧ	Only Show Miss	ed Visit	s				
		Sch.Start 🗸		Sch.End	7	Office	Office Area	7	7 Sch. Client	T	Sch. Caregiver	T	Bill Units	V	Pay Units 5	7 Service Cod	z s
		Arrival Call	7	Departure Call	V, a	Act.Office 7	7 Act.Office Are	a V	7 Actual Client	7	Actual Caregiver	V	Actual Bill	UV	Actual Pay Un 🖓	7 Actual Servic S	7 A
B	Þ	5/13/2020 3:45 PM	1	5/13/2020 4:00	M	Sandata-Rhod			Smith, Jerry		Green, Sandy		1 Visit		1 Visit	HOMEMAKER	
	J	▲ 5/13/2020 3:45 ▼	М	5/13/2020 4:00 PM	▼ M	1 Sandata-Rhod			Smith, Jerry		Green, Sandy		1 Visit		1 Visit		
<u></u>	t	Location not provided EVV GPS Threshold Exce No Client Signature	eed	5/15/2020 6:00 F	PM T	Sandata-Rhod			Smith, Jerry		Green, Sandy		1 Visit		1 Visit	HOMEMAKER	:

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.

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.

/	Call Re	art Page 🗙 🤇 view Call Log	Telephony	x										
	(Get Calls	Account:	EVV_Deepa	•	From Date: 6/2/	2020 🔻	To Date: 6/2/2020	•	Only Show Miss	ed Visits			
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		Arrival Call	V	Departure Call	V V	Act.Office 🛛 🗸	Act.Office Area	☑ Actual Client	V	Actual Caregiver	V A	Actual Bill U T	7 Actual Pay Un S	7 Actual Servic 🔽 A
	۹ 🕇	6/2/202	0 11:00 AM	6/2/2020 11:3 6/2/2020 11:30 A	ю ам М 🔻 Т	Deepa's EVV Deepa's EVV		Zimmer, Oliver Zimmer, Oliver		Zimmer, Caylin Zimmer, Caylin		0.5 Hourly 0.5 Hourly	0.5 Hourly 0.5 Hourly	Personal Care

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.

St	art Page 🗙 🧕	Telephony	x													
Call Re	view Call Log	1														
	Get Calls	Account:	EVV_Deepa		➡ Fror	n Date: 6/2/202	•	To Date	6/2/2020	¥	Only	y Show M	lissed Visits			
	Sch.Start	VΥ.	Sch.End	7	0ffice	e ⊽ Off	ce Area	▼ Sch	. Client	Ŧ	Sch. Care	egiver	\ Bill	Units	▽ Pay Units	▼ Service Cod ▼ S
	Arrival Call	V	Departure	Call 7	Act.0	ffice 🛛 🖓 Act	Office Area	∽ Acti	ual Client	V	Actual Ca	aregiver	\ ∀ Act	ual Bill U	☆ Actual Pay Un	▼ Actual Servic ▼ A
😰 📫	6/2/2020	11:00 AM	6/2/	2020 11:30 AN	1 Deep	a's EVV		Zin	nmer, Oliver		Zimmer,	Caylin	0.5	Hourly	0.5 Hourly	Personal Care
		-	6/2/202	20 11:30 AM 🔻	T Deep	a's EVV		Zin	nmer, Oliver		Zimmer,	Caylin	0.5	Hourly	0.5 Hourly	
	Main Note:	Bill Info	Pay Info	Travel Time	Margin	Payers Refus	als Sched	ule Info	Expenses	Pay Adj	H1500	Tasks	Signatures	Record	d Info	Personal Care
T	Start Date:	6/2/2020	•	11:00 AM 👻]	Servi	e: Person	al Care	*					6	Approve ly	Personal care
😰 🐢	End Date:	6/2/2020	- 1	11:30 AM 👻	0.50 Hrs	Bill Unit Typ	e: Hourly	•						Appr	oving acknowled	lges the exceptions
	Client:	Zimmer	r, Oliver	-		Pay Unit Typ	e: Hourly	-						Visit	without an arriva	l call
	Admission ID:	18985	🔻 🛐 As	sess Client 👻		Stat	is: C 🔺									
	Caregiver:	Zimmer	r, Caylin	-	Search	Primary Pay	er: Sandat	3								

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.

	St	art	t Page 🗙	Y Q	Telephon	y)	ĸ												
4	Call Re	vie	ew Call I	.og \															
		Ge	t Calls		Account:	E	VV_Deepa		Ŧ	From Date: 6/2	/2020 🔻	To [Date: 6/2/2020	•	Only Show Mis	sed Visi	S		
Γ		S	Sch.Start		V V	_	Sch.End	V	_	Office 7	Office Area	V	Sch. Client	V	Sch. Caregiver	V	Bill Units	Pay Units	Service Cod
		A	Arrival Cal		Y	۲ I	Departure Call	7	v	Act.Office 7	Act.Office Are	a V	Actual Client	7	Actual Caregiver	7	Actual Bill U	Actual Pay Un	Actual Servic
6	9 📫		6/2	2020	10:00 AM		6/2/2020 10:30) AM		Deepa's EVV			Zimmer, Oliver		Zimmer, Caylin		0.5 Hourly	0.5 Hourly	Personal Care
			6/2/202	20 10:0	• MA 00	т		-		Deepa's EVV			Zimmer, Oliver		Zimmer, Caylin		0.5 Hourly	0.5 Hourly	

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.

/ 🖨 s	tart Page 🗙	Telephony	x													
Call R	eview Call Lo	7														
	Get Calls	Account:	EVV_Deepa		➡ Fror	m Date: 6/2	/2020	▼ To [Date: 6/2/2020	•	Only	y Show M	issed Visits			
	Sch.Start	₹ V V	Sch.End	7	Office	e V	7 Office A	rea 🗸 🗸	Sch. Client	V	Sch. Care	giver	\ Bill	Units 🛛 🖓 Pa	ay Units	🗸 Service Cod 🏾 🔺
	Arrival Call	Δ,	Departure	Call 7	Act.0	ffice 🖓	Act.Offi	ce Area 🛛 🏹	Actual Client	Y	Actual Ca	regiver	V Acti	ial Bill U 🏹 A	tual Pay Un	√ Actual Servic [*]
😰 ┥	6/2/20	20 10:00 AM	6/2/	/2020 10:30 AM	Deep	oa's EVV			Zimmer, Olive	•	Zimmer,	Caylin	0.5	Hourly (.5 Hourly	Personal Care
	6/2/2020	10:00 AM 👻 1	г	-	Deep	oa's EVV			Zimmer, Olive		Zimmer,	Caylin	0.5	Hourly 0	.5 Hourly	
	Main No	tes Bill Info	Pay Info	Travel Time	Margin	Payers R	Refusals	Schedule I	nfo Expenses	Pay Adj	H1500	Tasks	Signatures	Record Info		Attendant C
7	Start Date	6/2/2020	▼ 1	10:00 AM 🔻		5	Service:	Personal Ca	re 💌					Ar	prove	Attendant c
😰 🐗	End Dat	6/2/2020	1	10:30 AM 👻	0.50 Hrs	s Bill Uni	it Type:	Hourly 🔻						Approving	acknowled	ges the exceptions
J	Clier	t: 🔏 Zimmer	, Oliver	•		Pay Uni	it Type:	Hourly 🔻								ure call
😰 ┥	Admission II	18985	🔻 🛐 As	sess Client 👻			Status:	С 🕶							ly	Attend in ho
L.	Caregive	r: 💄 Zimmer	, Caylin	•	Search	Primary	Payer:	Sandata								
® 4	••••															Respite Care

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.

/	Sta all Rev	rt Page 🗙 🧕 iew Call Log	Teleph 39	X									
	G	et Calls	Account:	EVV_Deepa		➡ From Date: 6	5/2/2020 💌	To Date: 6/2/2020	•	Only Show Mi	issed Visits		
		Sch.Start	Δ	Sch.End	Δ.	Office	♥ Office Area	∽ Sch. Client	T	Sch. Caregiver	∽ Bill Units ⊽	Pay Units	▼ Service Cod ▼ S
		Arrival Call	Δ,	Departure Call	A J	Act.Office	☆ Act.Office Area	√ Actual Client	7	Actual Caregiver	Ƴ Actual Bill U ⊽	Actual Pay Un	▼ Actual Servic ▼ A
B	1	6/2/202	20 8:00 AM	6/2/2020	8:30 AM	Deepa's EVV_		Zimmer, Oliver		Zimmer, Caylin	0.5 Hourly	0.5 Hourly	Personal Care

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.

/0	Star	t Page 🗙 🙎	Telephony	x														
Call	Revi	ew Call Log	\															
	Ge	et Calls	Account:	EVV_Deepa	1	➡ From	n Date: 6/2	/2020	•	Fo Date:	6/2/2020	•	🗌 Or	ly Show M	lissed Visit	S		
		Sch.Start	7	Sch.End	7	7 Office	- V	7 Office A	rea	Sch.	. Client		Sch. Car	egiver	V	Bill Units 5	Pay Units	▼ Service Cod ▼ S
		Arrival Call	Υ Υ	Departure	Call 7	7 Act.0	ffice 🛛 🖓	7 Act.Offi	ce Area	Ƴ Actı	ual Client	2	Actual C	aregiver	7	Actual Bill U ٦	Actual Pay Un	▼ Actual Servic ▼ A
P		6/2/202	0 8:00 AM	6/3	2/2020 8:30 AM	Deep	a's EVV			Zin	nmer, Oliver		Zimme	, Caylin		0.5 Hourly	0.5 Hourly	Personal Care
	1		-		-													
111	-	Main Notes	Bill Info	Pay Info	Travel Time	Margin	Payers R	Refusals	Schedu	le Info	Expenses	Pay Adj	H1500	Tasks	Signatu	res Record	Info	Dersonal Care
	Г	Start Date:	6/2/2020	v	08:00 AM 🔻		5	Service:	Personal	Care	•						Ok ly	
😰 🧉	Þ	End Date:	6/2/2020	-	08:30 AM 👻	0.50 Hrs	Bill Un	it Type:	Hourly	•						Appro Visit w	ving acknowled ithout any calls	iges the exceptions
	U	Client:	Zimmer,	Oliver	-		Pay Un	it Type:	Hourly	•							ly	
		Admission ID:	18985	🔻 📘 As	sess Client 👻			Status:	s 🔻									
		Caregiver:	Zimmer,	Caylin	•	Search	Primary	Payer:	Sandata									
						_												
																	.::	

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.

1	🕒 Sta	rt Page 🗙 🙎	Telephony	x													
/ Ca	all Rev	iew Call Log															
	G	et Calls	Account:	EVV_Deepa		 From Date: 1/2 	27/2020 👻	To Date: 1/27/2020	Only Show Miss	sed Visits							
		Sch.Start	Δ.	Sch.End	Υ.	Office 7	7 Office Area	▽ Sch. Client	▽ Sch. Caregiver	⊽ Bill Units 5	7 Pay Units	▼ Service Cod 、	Z Schedule I	∀ Notes	⊤ Telepho	7 Tel.Status	V Client
		Arrival Call	V ,	Departure Call	Υ Y	Act.Office 7	7 Act.Office Area	a → Actual Client	▼ Actual Caregiver	Ƴ Actual Bill U ʕ	7 Actual Pay Un	Actual Servic	Arrival Call	♥ Departure		7 Phone Number	V AClier
		Override Arriva	l V	Override Departure	7												
1	, e	1/27/202	20 9:15 AM	1/27/2020 9:30 A	м	Deepa's EVV		QA Delray, James	Rexha, Bebe	1 15 Min	0.25 Hourly	HHA	3855506		V		3295
		1/27/2020	9:15 🔻 N	M 1/27/2020 9:30 AM	M	Deepa's EVV		QA Delray, James	Rexha, Bebe	1 15 Min	0.25 Hourly		31858	31859			
-		1/27/2020	0.11.20.004	1/27/2020 12:20 0		Deserado DAV		OA Dalari Jamas	Dauta Data	4.15 Min	1.U.s.ushi		2055500		2	Durating Chara	2205
8	T	1/27/2020	1-30 × 1	1/2//2020 12:30 P	M V M	Deepas EVV		QA Delray, James	Rexha, bebe	4 15 Min	1 Houny	HHA /	3855500	31863		Duration chang	3293
		1/27/2020	11:25 AM	1/27/2020 12:33 P	м	beepert		QX D Circly/ Sumes	ricality bebe				51002	51005			
5	1	Check in was	outside the e	expected time threshold	14	Desea's D//		OA Dalany Jamas	Dauka Baka	4.15 Min	1 Haushi	HHA	2055517			Lesstingester	2205
er er	Т	Call times not Notes: Fixing	certified by both	the caregiver.	p M	Deepa's EVV		QA Delray, James QA Delray, James	Rexha, Bebe	4 15 Min 4 15 Min	1 Hourly	DDA	31864	31865		Locationnotpre	J 3295

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."

Start Page Y () Telephony Y										
Call Review Call Log										
Get Calls Account: EVV_Deepa	➡ From Date: 1/2	7/2020 • To Date: 1/27/2020 • Only Show Missed Visits								
Sch.Start V Arrival Call V Override Arrival V Override Arrival V Override Parture Call 7	7 Office T	Poffice Area	iill Units Actual Bill		 ✓ Service Cod ✓ Actual Servic 	♥ Schedule I ♥ Arrival Call	♥ Notes♥ Departure	Telepho T Caregive	7 Tel.Status 7 Phone Number	♥ Client ♥ AClier
1/27/2020 9:15 AM 1/27/2020 9:30 AI ▲ 1/27/2020 9:15 ▼ M 1/27/2020 9:30 AI	Conflicts	Manage		0.25 Hourly 0.25 Hourly	HHA	3855506 31858	31859	7		3295
I/27/2020 11:30 AM 1/27/2020 12:30 P I/27/2020 12:30 M 1/27/2020 12:30 I/27/2020 12:30 M 1/27/2020 12:33 P I/27/2020 11:25 AM I/27/2020 12:33 P	ManualTime Schedule	Message Clock In/Clock Out overridden by caregiver and requires a reason code for t change. Schedule from "1/27/2020 11:25 AM" to '1/27/2020 12:33 PM' conflicts with th metaber achieved a 28EEEE (* 2007) 1/27/2020 12:33 PM' conflicts with th	iis a	1 Hourly 🖄 1.13 Hourly	HHA	3855508 31862	31863	V	Duration Chang	3295
Main Notes Bill Info Pay Info Travel Time Start Date: 1/27/2020 11:25 AM	Schedule	Example Science 2005/16 (10): 12/2020 12:00 FP (0) 12/2020 12:00 FP for client' (24 Delray -OverTheshold, One to One'. Schedule from '1/27/2020 11:25 AM' to '1/27/2020 12:33 PM' conflicts with th existing schedule 385517' from '1/27/2020 12:30 PM' to '1/27/2020 1:30 PM for client' QA Delray, James'.	ð	rd Info	HHA	3855517 31864	31865	V	Location not pro	o 3295
End Date: 1/27/2020 12:33 PM	SkillGroup	1/27/2020 11:25 AM Caregiver Rexha, Bebe does not have the required skill to perform HHA services.	3	Cancel						
Admission ID: 🔄 18943 👻 📑 Assess Client 👻 Caregiver: 🧟 Rexha, Bebe 👻										
	(M)R									
1	3	ignore	Cei							

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

0	Sta	rt Page 🗙	201	Telephon	y x																		
Call F	Rev	iew Call L	.og \																				
	G	et Calls		Account	EVV	/_Deepa		- Fro	m Date:)	1/27/2020	•	To Date: 1/27/2020	•	Only Show Mis	sed Visits								
		Sch.Start		V	Sc	h.End	V	Offic	e	∇ Office	Area	Ƴ Sch. Client		Sch. Caregiver	⊽ Bill Units	▽ Pay Units	√ Service	Cod 🖓	7 Schedule I	∀ Notes	Ƴ Telepho ヾ	7 Tel.Status	V Client
		Arrival Call		V	De	eparture Call	V	Act.0	office	∀ Act.Off	ice Area	☑ Actual Client		Actual Caregiver	☆ Actual Bill	I U 🔽 Actual Pay Ur	Actual S	ervic 🗟	7 Arrival Call	☑ Departure	∀ Caregive	7 Phone Number	V AClie
		Override A	rrival	V	01	verride Departur	e V																
<u>s</u>	ľ	1/27	7/2020 2020 9	9:15 AM :15 🔻	м	1/27/2020 9 1/27/2020 9:30	30 AM	Deer M Deer	pa's EVV pa's EVV_			QA Delray, Jam QA Delray, Jam	25 25	Rexha, Bebe Rexha, Bebe	1 15 Min 1 15 Min	0.25 Hourly 0.25 Hourly	HHA		3855506 31858	31859	V		3295
<u>e</u>	Þ	1/27/	2020 1	.1:30 AM	MA	1/27/2020 12	2:30 PM	Deep	pa's EVV			QA Delray, Jam	25	Rexha, Bebe	4 15 Min	1 Hourly	HHA		3855508	31863	V	Duration Chanc	a 3295
		1/27/	2020 1	1:25 AM		1/27/2020 12	2:33 PM	Dec	003200			QX Dellay, Suit		A Conflict Production				~	51002	51005			
(þ	Main N	Notes	Bill Info	Pa	v Info Travel	Time 🗸	Margin	Payers	Refusals	Schedu	ule Info 🗸 Expenses	Rea	son:	n	_		-	3855517 31864	31865		Locationnotpre	o 3295
		End D	ate: 1 ent: §	./27/2020	elray,	12:33 PM James	4 •	1.13 Hr	s Bill (Pay)	Unit Type: Unit Type:	15 Min Hourly	• •	Men	no:									
		Admission Caregi	ver:	Rexha	3 🔻	🛐 Assess Cli e	ent 👻	Search	Prim	Status: ary Payer:	C 💌	Sandata											
] • [lack	knowledge that writt	ten documentation is	being mainta	ained					Þ
Unassi	ign	ed Calls														Ok	Cance	el					
		Arrival Call		V	V De	eparture Call	V	V Act.C	Office	▼ Act.Off	ice Area	☑ Actual Client							Arrival Call	☑ Departure	∀ Caregive	7 Phone Number	V AClie

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.

/	🕒 Sta	irt Page 🗙 🔨	Telephor	y x	🐰 QA Delray, J 🗙															
4	all Rev	riew Call Log										_								
Г	G	et Calls	Account	EVV	/_Deepa	-	From Date: 1/2	7/2020 -	To Date: 1/27/2020	Ŧ	Only Show Missed Vis	its								
L	-		_														_			
		Sch.Start	A		th.End	7 🗸	Office 5	7 Office Area	Sch. Client	2	Sch. Caregiver	7 B	ill Units 🛛 🖓	Pay Units	Service Cod V	Schedule I	V Notes	Telepho T	Tel.Status	V Clien
		Arrival Call	A	De	eparture Call	7	Act.Office 5	7 Act.Office Are	a 🛛 Actual Client	1	Actual Caregiver 5	7 A	ctual Bill U 🖓	Actual Pay Un	🗸 Actual Servic 🏹	Arrival Call	✓ Departure	▼ Caregive ⊽	Phone Number	▼ AClie
		Override Arriv	al 🏼 🖓	0\	verride Departure	T														
R)	1/27/202	20 12:30 PM		1/27/2020 1:30 PI	И	Deepa's EVV		QA Delray, James		Rexha, Bebe	-	4 15 Min	1 Hourly	HHA	3855517		V	Locationnotpro	3295
	J	1/27/202	0 12:3 🔻	M	1/27/2020 1:30 PM	M	Deepa's EVV		QA Delray, James		Rexha, Bebe		4 15 Min	1 Hourly		31864	31865			
		Location not	provided																	
		EVV GPS Thre	shold Exce	eded																

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."

Start Page X 1 Telephony X		
Get Calls Account: EVV_Deepa From Date: 1/27/2020 To D	te: 1/27/2020 - Only Show Missed Visits	
Sch.Start V Sch.End V Office V Office Area V Arrival Call V V Departure Call V Act.Office V Act.Office Area V Override Arrival V Override Departure V V Act.Office V Act.Office Area V	th. Client ♥ Sch. Caregiver ♥ Bill Units ♥ Pay Units ♥ Service Cod ♥ Sch. ttual Client ♥ Actual Caregiver ♥ Actual Bill U♥ Actual Pay Un ♥ Actual Servic ♥ Arri	edule I ⊽ Notes ⊽ Telepho ⊽ Tel.Status ⊽ Clier val Call ⊽ Departure ⊽ Caregive ⊽ Phone Number ⊽ AClie
I/27/2020 12:30 PM I/27/2020 13:30 PM Meepa's EVV I/27/2020 12:30 PM I/27/2020 13:30 PM M Deepa's EVV Main Notes Vall Info \ Pay Info \ Travel Time \ Margin \ Payers \ Refusals \ Schedule I Sart Date: I/27/2020 • 1:30 PM • M Deepa's EVV End Date: I/27/2020 • 1:30 PM • Info \ Pay Info \ Travel Time \ Margin \ Payers \ Refusals \ Schedule I Client: Q.A Delray, James • Pay Unit Type: Hourhy • Admission ID: 1943 • E Assess Client • Satus C • Caregiver: Resha, Bebe • Search Primary Payer: MAINE Sand	A Delray, James Rexha, Bebe 4 15 Min 1 Houriv HHA 385 Conflict S Conflict Type Message No GPS Visit location not captured and requires a reason code for this change. SkillGroup 1/27/2020 12:30 PM Caregiver Rexha, Bebe does not have the required skills to perform HHA services.	25517 I Locationnotpro 329 4 31865 1 Call ⊽ Departure ⊽ Caregive ⊽ Phone Number ⊽ ACI
	Se Ignore Cancel	

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

/€	Start Page 🗙 🧕 Telephony 🗙				
/ Cal	Review Call Log				
	Get Calls Account: EVV_Deepa From Date: 1/27/2020 To Date: 1/27/	020 Only Show Missed Visits			
	Sch.Start V Sch.End V Office V Office Area V Sch. Client	▼ Sch. Caregiver ▼ Bi	Il Units ♀ Pay Units ♀ Service	Cod 又 Schedule I 又 Notes	マ Telepho マ Tel.Status マ Clier
	Arrival Call ∇ Departure Call ∇ Act.Office ∇ Act.Office Area ∇ Actual Clie	t 🛛 🕈 Actual Caregiver 🖓 Ac	tual Bill U 🏹 Actual Pay Un 🏹 Actual	Servic 🏹 Arrival Call 🛛 Departure	・ 文 Caregive 文 Phone Number マ ACli
	Override Arrival V Override Departure V				
B	n 1/27/2020 12:30 PM 1/27/2020 1:30 PM Deepa's EVV QA Delra	lamec Revha Rehe 4	15 Min 1 Hourly HHA	3855517	Location not pro 329
	▲ 1/27/2020 12:3 ▼ M 1/27/2020 1:30 PM ▼ M Deepa's EVV QA Delra	😸 EVV Conflict Resolution	- 🗆 X	31864 31865	
	Main Notes Bill Info Pay Info Travel Time Margin Payers Refusals Schedule Info Expe	Reason:			
	Start Date: 1/77/2020 - 1 12:20 DM - Sarvira: UUA -				
	End Date: 1/27/2020 01:30 PM - 1.00 Hrs Bill Onit Type: 15 Min -	Memo:			
	Client: 🐰 QA Delray, James 🔹 Pay Unit Type: Hourly 👻				
	Admission ID: 🗐 18943 🔻 🗊 Assess Client 👻 Status: C 🗣				
	Caregiver: 🤱 Rexha, Bebe 💌 Search Primary Payer: MAINE Sandata				
•					•
Unas	Arrival Call XX Departure Call XX Act Office XX Act Office Area XX Actual Clin	l estre un a trat un		nic V Arrival Call V Departure	X Caragiya X Bhana Number X ACli
		l acknowledge that wh	Cancel	Tvic e Arrival call e Departure	a caregive a Phone Number a Aci
			Caricei		

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

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

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.			

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.

Main Note	s 🗸 Bill Info	V Pay Info	Travel Tim	e	Margin \	Payers	Refusals	Schedule Info	Expenses	🛛 Pay Adj	(H1500)	Tasks	Signatures	Record Inf	o
Start Data:	11/26/2014		04-00 PM				Services								ОК
Start Date.	11/26/2019	· ·	04:00 PM	•		Bill	Unit Type:	нна	•					C	ancel
End Date:	11/26/2019	4:15 PM (1	05:00 PM	•	1.00 Hrs	s Dirit	Unit Type:	15 Min 🔻						1	Rec
Client:	A-DH	4:30 PM (3	0 mins) 5 mins)		I	Payl	Statues	Hourly -							
Admission ID:	18908	5:00 PM (1	hour)				Status:	C 🔻							
Caregiver:	🔠 Rexha	5:30 PM (1	.5 hours)	~	Search	Prim	ary Payer:	PA DHS ODP							
	L	5.451 M (1	.731100137												.:

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

/ing: 27 Schedules	NPD: 🔽 Pay Date:		Conflicts	
부 Start Date 스 무	Start 7	End	Conflict Type	Message
-			► EVV	Schedule is completed and requires a reason code for this change.
Main Notes Bill Info	Pay Info Travel	Time Ma	SkillGroup	11/26/2019 4:00 PM Caregiver Rexha, Bebe does not have the required skills to perform HHA services.
Start Date: 11/26/2019	▼ 204:00 PM	-		
End Date: 11/26/2019	05:15 PM	- 1.		
Client: 🐰 PA-DH	S Donohue, Diana	-		
Admission ID: 📳 18908	👻 🛐 Assess Clie	ant 👻		
Caregiver: 🤱 Rexha,	Bebe	▼ S		
		_		
Mon 12/2/2019 13	:45 AM 12:	00 PM		
Mon 12/2/2019 12	:15 PM 12:	30 PM		
Mon 12/2/2019 11	1:30 AM 11:	45 AM		
Tue 12/3/2019 06	:00 AM 07:	00 AM	02	Ignore Cancel
Tue 12/2/2010	04	45 DM		

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

Start Page X Office Schedules X								
Office Schedules Timeline Expenses Reports								
Office: Deepa's EVV_Aggregators From Date: 11/24/2019 To Date: 12/13/2019 Get Schedules								
Displaying: 27 Schedules NPD: 🗸 Pay Date: 🔽 🖌 🗸 Auto Save Print 🗸								
P Start Date A P End P Image: P Start P End P								
🔯 🗈 – – – – Reason:								
Main Notes Bill Info Pay Info Travel Time Margin Pay								
Memo:								
Start Date: 11/26/2019 V 04:00 PM V								
End Date: 11/26/2019 05:15 PM - 1.25 Hrs								
Client: 🧏 PA-HeronBay, Diana 🔽								
Admission ID: 🗐 18908 👻 📳 Assess Client 👻								
Caregiver: 🖁 Rexha, Bebe 🔽 Search								
TT								
Mon 12/2/2019 12:15 PM 12:30 PM lacknowledge that written documentation is being maintained								
Non 12/2/2019 11:30 AM 11:45 AM Ok Cancel								

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.