



Santrax Electronic Visit Verification and Sandata Electronic Visit Verification 8.1.11

Release Date: Thursday, March 7, 2019

UNIVERSAL RELEASE NOTES

The content of the enclosed Release Notes is dependent upon final Quality Assurance validation. If you have any questions or concerns about the content therein, please contact Customer Care at your agency's designated telephone number. The final version will be available in your online library post-release.

Valued Provider:

We are now including all items in the release notes. They may or may not apply to your configuration.

In reviewing the notes below, please refer to the "prerequisites" line which indicates the required functionality, product, or audience associated with the item.

If the functionality is not automatically available, please contact your Sales Representative or Customer Care for additional information.

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VISIT MAINTENANCE

1. UPDATES DISPLAY IN LOCAL TIME.

Modifications were made to ensure that the time stamp affiliated with any changes to a schedule display on the **History** tab using the account's time zone. Time entries will also be stored in the account's time zone.

Prerequisite: Sandata EVV Version 8

2. NEW SCHEDULE ID FIELD.

Added a new field, **SCHEDULE ID**, to the *General* tab of the *Visit Details* screen in Visit Maintenance. When scheduling is enabled, and a visit is associated with a schedule, the field populates with a value that associates it with a schedule in the application from which it was imported.

Prerequisite: Sandata EVV Version 8

3. PAYER/PROGRAM SELECTABLE BASED ON SERVICE.

Modifications were made on the *General* Tab of the *Visit Details* screen in Visit Maintenance to allow users to select a **PAYER** and **PROGRAM** for a **SERVICE** when the service is associated with more than one payer/program.

Prerequisite: Sandata EVV Version 8

4. ADJUSTED HOURS TO A SCHEDULED VISIT WITHOUT CALLS.

Modifications were made to support adjusted hours entered for a scheduled visit.

- **Adjusted In** hours cannot begin more than 24 hours before the scheduled start time.
- **Adjusted Out** hours cannot end more than 24 hours after the scheduled end time.
- Maximum visit length is 25 hours.

Prerequisite: Sandata EVV Version 8

5. RESTRICTION OF MANUAL CALLS OUTSIDE CALL MATCHING WINDOW.

Users are now prevented from entering a manual call for a scheduled visit if it is outside the call matching window. The call matching window sets a length of time (configurable from the back end; default is two hours) in which calls can be entered before or after their scheduled times. For example, if the window is two hours:

- An in call can be entered up to two hours before the scheduled start time.
- An out call can be entered up to two hours after the scheduled end time.
- Any attempt to enter calls outside that window is rejected.

Prerequisite: Sandata EVV Version 8 with Scheduling

REPORTS & EXPORTS

6. CHANGES TO CALL LISTING REPORT.

Modifications were made to the *Call Listing* report. The following changes were made:

- Visits with an unknown client and unknown employee are not displayed.
- Added a new column, **GROUP VISIT CODE**. This column displays a system-generated code associated with a visit when it is part of a group visit.
- Added new Medicaid ID logic:
 - o Show client Medicaid ID if available.
 - o When a client is marked as a newborn, **CLIENT MEDICAID ID** will show as 'N' since there is no Medicaid ID.
 - o If the client Medicaid ID is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medical ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV.
- Changed the following heading labels:
 - o **MEDICAID ID** is changed to **CLIENT MEDICAID ID**
 - o **EMAIL** is changed to **EMPLOYEE EMAIL**
 - o **SANTRAX ID** is changed to **EMPLOYEE SANTRAX ID**
- When exported to Excel or .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).
- Updated logic for displaying client's phone number:
 - o If client is known, the full phone number displays.
 - o If client is unknown, only the last four digits of the phone number display. The first six digits display as asterisks.

Prerequisite: Sandata EVV Version 8

7. CHANGES TO CALL SUMMARY REPORT.

Modifications were made to the *Call Summary* report. The following changes were made:

- Visits with an unknown client and employee are not displayed.
- Added a new column, **PHONE #**. The following logic applies:
 - o If client is known, the full phone number displays.
 - o If client is unknown, only the last four digits of the phone number display. The first six digits display as asterisks.
- Added new Medicaid ID logic:
 - o Show client Medicaid ID if available.
 - o When a client is marked as a newborn, **CLIENT MEDICAID ID** will show as 'N' since there is no Medicaid ID.
 - o If the client Medicaid ID is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medical ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV.
- Changed the following heading labels:
 - o **MEDICAID ID** is changed to **CLIENT MEDICAID ID**
 - o **EMAIL** is changed to **EMPLOYEE EMAIL**
 - o **SANTRAX ID** is changed to **EMPLOYEE SANTRAX ID**
 - o **BILL / HRS** is changed to **BILL / HOURS**
- When exported to Excel or .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).
- Any columns that display hours display in hh:mm format.
- If client is unknown, the **CLIENT NAME** field now remains blank.

Prerequisite: None

DATA ENTRY

8. CLIENT EDIT FUNCTIONALITY FOR NAP/CDS ACCOUNTS.

Updated client editing functionality for Non Agency Provider (NAP) and CDS (Client-Directed Services) accounts with data entry enabled.

- NAP/CDS users can add additional addresses and phone numbers for clients.
- NAP/CDS users can update client addresses and phone numbers they created or added.
- NAP/CDS users cannot change client addresses and/or phone numbers that they didn't create.
- If the NAP/CDS user who created the address or phone number is no longer active in the database, the first user in the system who updates the address and/or the phone number becomes the owner of the record going forward. The historic record for the user who created the client record remains blank until another user updates it.

Prerequisite: Sandata EVV Version 8, NAP/CDS Functionality

INTERFACE

9. CALCULATION OF BILLING HOURS FOR VISITS IN ALTEVV.

Modifications were made to ensure that bill hours sent via the AltEVV interface are ignored and are instead calculated using the imported in and out times. When enabled (**Account Manager**

> *General Setup*), the following standard rules apply:

- Calculate hours using adjusted in and adjusted out times
- Calculate hours using call in and call out times
- If neither call times nor adjusted times are present, billing hours are left blank

Prerequisite: Sandata EVV Version 8, AltEVV Interface, Ohio ODM Payer

AGGREGATOR

10. RESTRICTION OF ACCOUNT ACCESS GROUPS.

Modifications were made to ensure users in Aggregator with permissions to manage access groups see only the accounts they manage. One or more of the following functions are implemented:

- When removing an account, a message warns users that they will lose the visibility for the account(s) and cannot get it back.
- A warning displays to confirm before the last account is removed from a group.
- If an account is assigned to more than one access group, users can only view a list of accounts for the group(s) they are assigned.

Prerequisite: Sandata EVV Version 8, Aggregator