Requirement Specification for Electronic Visit Verification (EVV) Incoming Clients, Employees, Schedules, Client Employee XREF, and Outgoing Completed Visits Part of the Open EVV Series of Interfaces

Version 7.10

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Revision History

Version	Description	Date Updated
7.1	Clarified verbiage around required fields and segments.	3/20/2019
7.2	Clarified interaction between ClientSSN and RecipientIDCustom2, which was formerly known as ClientOtherID	4/2/2019
7.3	Added “ActivityEndDate” to export fields.	5/20/2019
7.4	Reworked document to be more in line with other Sandata specifications, such as Alt-EVV. Explicitly defined XREF as one of the incoming entities.	8/2/2019
7.5	Added “ReasonCode” to schedules. Broke Client Designees out into their own segment, supporting multiple designees per client. Added client designee relationship field.	8/12/2019
7.6	Added Technical Companion Appendix. Removed “ReasonCode” from schedules. Updated Client Coordinator to length 64. Updated sample data date formats for XRefStartDate, and XRefEndDate. Added EffectiveStartDate and EffectiveEndDate to Client Payer Information.	9/30/2019
7.7	Added “VisitLocationType” to the completed visits download. Added “ClientCaseManagerEmail” to clients.	12/16/2019
7.8	Made Client Contact Information its own repeatable segment.	1/10/2020
7.9	Removed verbiage about RecipientIDCustom2 being conditionally required based on whether ClientSSN was or was not provided.	2/3/2020
7.10	Clarified verbiage defining when the phone number segment is required. Added ContingencyPlan and Reschedule fields to schedule segment. Added ProviderAssentContPlan to client segment. Added additional verbiage around possible uniqueness on RecipientIDCustom1 and RecipientIDCustom2 fields.	3/2/2020

1 Overview

This specification is intended to document the requirements for using the Sandata EVV Interface (part of the Open EVV Series of interfaces) for sending clients, employees, schedules and client employee xref, and returning completed visit information to a 3rd party agency management, scheduling or fiscal management system. Sandata supports receiving data via RESTful services with JSON formatting. Once uploaded, all data is applied to the Sandata EVV database and after visit information is collected and processed, users can download the completed visit data.

We recommend that the transfers be initiated based on a schedule. Best practice is to send and receive this information hourly and at most, no more often than every fifteen minutes. It is expected that each agency will ONLY call this interface through a single centralized process. Once the first transfer is completed and a response is provided from Sandata EVV another transfer can be initiated by the 3rd Party System. The required columns must be present in the transmission or the import will reject the record.

1.1. Intended Audience

The intended audience of this document is:

- Project Management and Technical teams at Sandata.
- Project Management and Technical teams at a designated Provider/Vendor who will be implementing this interface.

1.2. Transmission Frequency

For optimal system performance, it is recommended that data should be sent based on a schedule. It is recommended that this frequency is between every 15 minutes and once an hour. It is expected that information is sent as it is added/changed/deleted in the Source EVV Data Collection System. Note that rejection responses will be delivered on a separate API call that is initiated by the third party–in near real time.

1.3. Transmission Limits

A single transaction may contain from 1 to 5,000 parent records. A single record set would include all associated elements. Each parent record may contain no more than 5,000 children.

If the group size exceeds the maximum limit for the group, the complete group will be rejected.

Records received may be queued and processed as resources permit. Other transactions received for the Provider ID will be queued behind these until they are processed since they must be processed in the order received.

1.4. Data Type Format Details

The user will send information in **JSON** format. JSON allows multiple child entities for a parent.

The format of the information sent must match exactly the format defined below and must be sent via a REST API service using JSON. Ultimately, we support only three data types during transmission: string, number and Boolean. The specification references additional data types to ensure that data is received in the expected formats and appropriate record level editing can be incorporated. Except where numeric, the assumed JSON format should be string. The data type provided in the specification is based on the following field definitions.

Note that the format is case sensitive. All field names must be provided in EXACTLY the casing used in the definitions below.

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
Timezone	All time for tracking visits will be in UTC. **Time zone** The Time zone name expected in each transaction is the actual Time zone where the event took place. i.e. US/Eastern	See Appendix for list of EVV supported Time zones
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)

Data Type	Description	Example
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

1.5. Rejected Record Process

When records are received, Sandata will return against each group a transaction ID and an ACK (acknowledgment of receipt). This transaction ID can be queried by the caller for status of the records in the transaction. This process will allow the provider/vendor to get status on any of the records that may have been rejected.

1.6. New Record and Updates

New records and updates for previously sent data should be provided. If a set of records is sent, all associated applicable elements and sub-elements should be sent. Partial updates will be rejected. An update that deletes a client or employee record will not actually remove information since Sandata will not physically delete information. The record history will maintain the original data received.

1.7. Transmission Method

Sandata supports a Services Oriented Architecture (SOA). Sandata will provide an API for providers, vendors, and/or agency's internal IT organizations to utilize. Sandata will provide sample JSON format information (Java equivalent to XML), as well as the WADL (JSON equivalent of the WSDL) to those parties developing the interface. This specification will include the REST endpoints needed to request status on record acceptance /rejection.

1.8. Rules

The following rules apply to information received through this interface. For all rules that result in a rejection, it is expected that the issue will be resolved in the source system and the information subsequently retransmitted.

✓ There is one set of Interfaces per Sandata Provider Agency ID.

✓ There will be 4 independent types of data provided through the Open EVV interface:
- Clients;
- Employees (Field Staff);
- Schedules; and
- Client Employee XREF

THE USER OF THE API WILL BE RESPONSIBLE FOR:

✓ This API is an incremental interface. Records which have not changed should not be resent.

✓ Complete transmissions.
- When sending a client, all applicable elements and sub elements must be sent during each transmission.
- When sending an employee, all applicable elements and sub elements must be sent during each transmission.
- When sending a schedule, all applicable elements and sub elements must be sent during each transmission.
- When sending a client employee xref, all applicable elements and sub elements must be sent during each transmission.

✓ Data quality. All data will be accepted from third party data "as is,".

✓ Using standard date/time format. All dates and times provided must be sent in UTC (Coordinated Universal Time) format in GMT.

GENERAL PROCESSING RULES:

- ✓ If a record is received and any required data is missing, malformed, or incomplete as defined in the specification, the record will be rejected or set to default values in accordance with the detailed specifications.

- ✓ If an optional field is provided with an invalid value (one not listed in this specification), the field will be set to the default value, null and/or rejected, unless otherwise specified in this specification.

- ✓ If text (string) field length is longer (>/greater than) than the maximum allowed for that field value, unless otherwise noted, the field will be truncated to the maximum length specified for that field.

- ✓ Records will be processed in the order received.

- ✓ Header information as determined during implementation must be included in each transmission for each record (client, employee, schedule, client employee xref), otherwise the entire collection of records will be rejected.

- ✓ All data in the request should be associated with the same account/provider provided in the header information

- ✓ All JSON examples provided demonstrate fields which are guaranteed to be returned. Additional fields may be included based on implementation details or may be added over time.

1.9. Message Acknowledgement (ACK) and Transaction ID

Upon sending data to one of the APIs described in this document, the user will be returned an acknowledgement of receipt of the data. This acknowledgement will contain information about any improperly formatted data, as well as provide a unique identifier with which to look up the status of the request.

Index	Column Name	Description	Type
1	id	Unique identifier for the request.	String
2	status	Status of the request. "SUCCESS" indicates a properly formatted request was received and is being processed. "FAILED" indicates the request failed initial validation.	String
3	messageSummary	A brief description of the result of the request.	String
4	data	On success, will return some basic information about the request. On error, will send back input data with added data points for "ErrorCode" and "ErrorMessage". Content varies based on API and implementation.	JSON Object

JSON Structure:


```
{
    "id": "23b3b035-a4a3-4514-9f8a-958e76bc9822",
    "status": "SUCCESS",
    "messageSummary": "The result for the input UUID is not ready yet. Please try again.",
    "data": {
       "uuid": "23b3b035-a4a3-4514-9f8a-958e76bc9822",
       "account": "12345",
       "message": "The result for the input UUID is not ready yet. Please try again.",
       "reason": "Transaction Received.",
       "transactionId": "23b3b035-a4a3-4514-9f8a-958e76bc9822"
    }
 }
```

1.10. Response for Record Status

Using the id (or transactionId) from the message acknowledgement, the status of a request may be requested from the status endpoint for each API. The response will denote if the request was processed successfully. If not, it will return detailed error messages.

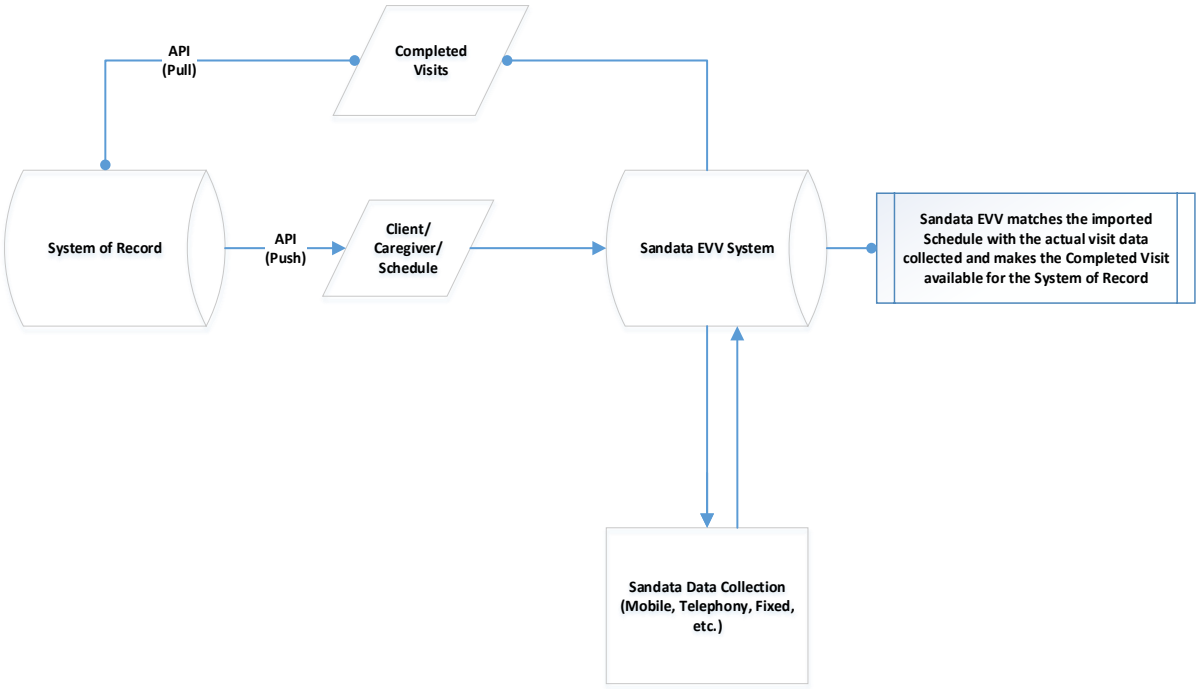
Index	Column Name	Description	Type
1	id	Unique identifier for the request.	String
2	messageSummary	A brief description of the result of the request.	String
3	data	On success, will return some basic information about the request. On error, will send back input data with added data points for "ErrorCode" and "ErrorMessage". Content varies based on API and implementation.	JSON Object

JSON Structure:

```
{
    "id": "23b3b035-a4a3-4514-9f8a-958e76bc9822",
    "status": "SUCCESS",
    "messageSummary": "All records updated successfully.",
    "data": {
       "uuid": "23b3b035-a4a3-4514-9f8a-958e76bc9822",
       "account": "12345",
       "message": "All records updated successfully.",
       "reason": "Transaction Received.",
       "transactionId": "23b3b035-a4a3-4514-9f8a-958e76bc9822"
    }
 }
```

2 Model

This interface model targets users/vendors who want to communicate with Sandata EVV as a client application. Sandata EVV provides transfer API services that are available for users to upload clients, employees (caregivers), schedules, and client employee xref, and to download visit data.



3 Field Details

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

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

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

3.1 Account Identification

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes

3.2. Client

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes
3	ClientLastName	Client's last name.	30	String	Yes
4	ClientFirstName	Client's first name.	30	String	Yes
5	ClientMiddleName	Client's Middle Initial. May be required if needed for billing. Note that some systems may use only the first letter as the initial.	30	String	

Index	Column Name	Description	Max Length	Type	Required
6	MissingMedicaidID	This value is to indicate that the member is a newborn and does not yet have an assigned Medicaid ID. If this value is provided, Client Medicaid ID will be ignored and will be valid as null. Values True/False. This value will be assumed to be false unless there is special setup for the account to support this feature.	5	String	
7	ClientEmailAddress	Email Address for the Client. This value is required for the client if the client is expected to use the Sandata EVV Member Portal.	50	String	
8	ClientSuffix	Client Suffix (eg. Sr, Jr, III, IV, V (no special characters)).	4	String	
9	ClientSSN	Client's Social Security Number. Numbers only, no dashes and leading zeros must be included. May be required if needed for billing. Format - #########.	9	String	Conditional.
	Client Identifiers				
10	ClientMedicaidId	Unique ID provided by the State Medicaid program to the client.	64	String	

Index	Column Name	Description	Max Length	Type	Required
11	RecipientIDCustom1	Additional Client User-Defined ID. Commonly used to customize the built-in client ID within the system. If the billing is in scope, this field will identify the correct claim with the correct patient. Depending on implementation, may be expected to be unique across all clients.	24	String	
12	RecipientIDCustom2	Additional Client User-Defined ID. Commonly used to store client's ID from another system. This value is used to match the client to an existing client record during import. Depending on implementation, may be expected to be unique across all clients.	24	String	
13	CaseManager	Payer Level Case Managers are individuals who coordinate all aspects of the care of individual patients. Provide full name in this data element.	25	String	
14	ClientCaseManagerEmail	CaseManager email address.	64	String	

Index	Column Name	Description	Max Length	Type	Required
15	Coordinator	The staff member assigned to the Client in a specific Agency as the coordinator for an employee. The values for this field will be defined during implementation.	64	String	
16	ClientMedicalRecordNumber	The medical record number assigned to the client.	12	String	
17	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	
18	ProviderAssentContPlan	Indicator to capture provider's assent that the member's contingency plan provided will be reviewed with the member every 90 days and documentation will be provided.	5	Boolean	
	Client Demographics				
19	ClientGender	Client's Gender. Values: O=Unknown or Other, M=Male, F=Female.	1	String	
20	ClientBirthDate	Client's Date of Birth. Required for billing.		Date	
21	ClientMaritalStatus	Client's Marital Status. Values: M = Married, S = Single, W = Widowed, O = Other.	1	String	
22	ClientLanguage	Client's language. The list of acceptable values will be determined during implementation.	32	String	

Index	Column Name	Description	Max Length	Type	Required
23	ClientTimeZone	Client's primary time zone. Please see the appendix for acceptable values.	64	String	Yes
24	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	
25	Team	Team if applicable. Values will be determined during implementation if applicable.	4	String	
26	Branch	Used to identify a branch location within a given agency. Values will be determined during implementation if applicable.	2	String	
27	Borough	Primarily used for New York City agencies. Values will be determined during implementation if applicable.	1	String	
28	Area	Area code for the client.	2	String	
	Client Billing and Payer Information				
29	ClientAdTypeID	User defined ID representing ID for Admission Type / payer.	6	String	
30	ClientPrimaryDiagnosisCode	The client's primary diagnosis code in ICD-10 format.	10	String	

Index	Column Name	Description	Max Length	Type	Required
31	BillRate	Rate for billing. Can have values like 5.043 or 1.23 and should not exceed 5 characters. Decimal point is included in the length.	6	String	
32	CaseNumber	Case number sent as part of the schedule record. Special Use.	9	String	
33	CaseSequence	Case Sequence. Special Use.	4	String	
34	MobileDevice	Value in this field determines if the client requires a mobile device to be supplied by the payer/program. Special use only. Expected values: Y or N.	1	String	Yes
35	Status	Status of a Client. For delete a record, set to D or leave empty for an insert or update.	1	String	
	Client Primary Address – at least one address must be provided for the client if mobile devices are to be used. Additional addresses can be provided.				
36	ClientAddressLine1	Street Address Line 1 associated with this address. PO Box may not acceptable for Billing and PO Box will not function correctly for MVV.	30	String	Yes
37	ClientAddressLine2	Street Address Line 2 associated with this address.	30	String	
38	ClientCity	City associated with this address.	30	String	Yes
39	ClientState	State associated with this address. Two Character standard abbreviation.	2	String	Yes

Index	Column Name	Description	Max Length	Type	Required
40	ClientZip	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #########.	10	String	Yes
41	ClientAddressType	Values: Home, Business, Other (Note that multiple of the same type can be provided).	12	String	

3.2.1. Client Payer Information

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

Index	Column Name	Description	Max Length	Type	Required
1	PayerID	Sandata EVV assigned ID for the payer. Payer ID is determined during the implementation process.	64	String	Yes
2	PayerProgram	If applicable, the program to which this visit belongs. Potential use and list of values to be determined during implementation.	9	String	Yes
3	ProcedureCode	This is the billable procedure code which would be mapped to the associated service. For most programs, it is the HCPCS number.	5	String	Yes
4	ClientPayerID	Unique Identifier sent by Payer.	20	String	
5	ClientEligibilityDateBegin	The date the client became eligible with the payor.		Date	
6	ClientEligibilityDateEnd	The date the client ended eligibility with the payor.		Date	
7	EffectiveStartDate	The date the client is eligible to receive the service.		Date	
8	EffectiveEndDate	The last date the client is eligible to receive the service.		Date	
9	ClientStatus	The client's current status. Provide the 2-digit code including the 0. Available values: 02 = Active, 04 = Inactive.	2	String	

3.2.2. Client Designee

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

Index	Column Name	Description	Max Length	Type	Required
1	ClientDesigneeFirstName	First Name of the Client Designee.	30	String	Yes
2	ClientDesigneeLastName	Last Name of the Client Designee.	30	String	Yes
3	ClientDesigneeEmail	Email address of the Client Designee.	50	String	Yes
4	ClientDesigneeStatus	Status of the Client Designee pertaining to Sandata system access. If the ClientDesigneeStatus is sent, ClientDesigneeStartDate and ClientDesigneeEndDate are not required. (Provide the 2-digit code including the 0) Sandata System can either populate the start and end date based on the date of receipt of the status or the source system can send the activation and termination date. (Please note Activation and termination dates cannot be backdated or futuredated) Available Values: 02 = Active, 04 = Inactive.	2	String	Conditional
5	ClientDesigneeStartDate	The date Client Designee was assigned. Future date is not acceptable. If the ClientDesigneeStartDate is sent, ClientDesigneeStatus is not required.		Date	Conditional
6	ClientDesigneeEndDate	The date Client Designee was terminated. Future date and Back date is not acceptable. If the ClientDesigneeEndDate is sent, ClientDesigneeStatus is not required.		Date	Conditional
7	ClientDesigneeRelationship	Relationship of the Designee to the Client	30	String	

3.2.3. Client Phone Number

The phone number segment is a child/sub-segment of the client/recipient segment described above. If provided, it would be a child object within the client/recipient. There may be more than one phone number for a single client/recipient. This segment is required if scheduling functionality is in use.

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes
3	ClientPhoneType	Phone Type: Fax, Home, Mobile, Work, Other	12	String	
4	ClientPhone	Client phone number. Format ##########.	10	String	Yes

3.2.4. Client Address

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes
3	AddressType	The type of secondary address. Values: Business, Home, Other	50	String	Yes
4	ClientAddressLine1	Street Address Line 1 associated with this address. PO Box may not acceptable for Billing and PO Box will not function correctly for MVV.	30	String	Yes
5	ClientAddressLine2	Street Address Line 2 associated with this address.	30	String	
6	ClientCity	City associated with this address.	30	String	Yes
7	ClientState	State associated with this address. Two Character standard abbreviation.	2	String	Yes
8	ClientZip	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #########.	10	String	Yes

3.2.5. *Client Contact*

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes
3	ContactLastName	Client Contact Last Name. Entered by provider agency.	30	String	
4	ContactFirstName	Client Contact First Name. Entered by provider agency.	30	String	
5	ContactRelationshipToClient	Emergency Contact's relationship with the Client. The list of acceptable values will be determined during implementation.	20	String	
6	ClientContactPhoneType	Client Contact's Phone Type. Values: Business, Home, Mobile, Other.	12	String	
7	ContactPhoneNumber	Client Contact Home Phone Number. Entered by provider agency. Format ##########.	10	String	Yes
8	ContactAddressLine1	Client Contact's Street Address, Line 1.	30	String	
9	ContactAddressLine2	Client Contact's Street Address, Line 2.	30	String	
10	ContactCity	Client Contact's City.	30	String	
11	ContactState	Client Contact's State. Two Character standard abbreviation.	2	String	
12	ContactZip	Client Contact's Zip Code. 9-digit primary address zip code. If additional 4 digits is not known, provide zeros. Format #########.	10	String	

Index	Column Name	Description	Max Length	Type	Required
13	ContactEmail	Client Contact's email address.	64	String	

3.3. Employee

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system. This value must be all digits and must be unique within the agency. The system will perform optimally if this value is the same length for all employees and should be no less than 4 digits. Exact length to be provided will be determined during implementation.	9	String	Yes
3	EmployeeLastName	Employee's last name.	30	String	Yes
4	EmployeeFirstName	Employee's first name.	30	String	Yes
5	EmployeeMiddleInitial	Employee's middle initial.	1	String	
6	Department	Employee's department. The values for this field will be defined during implementation.	3	String	
7	EmployeeAPI	Employee's Alternate Provider Identifier or Medicaid ID.	25	String	
8	EmployeeType	Such as nurse or home health attendant. This is user defined varies based on the source system. The values for this field will be defined during implementation.	1	String	
9	Discipline	Category of Service. The values for this field will be defined during implementation.	17	String	

Index	Column Name	Description	Max Length	Type	Required
10	EmployeeEmailAddress	Employee's email address. This value is required if the employee is to have access to the Sandata mobile application (SMC) or to the Sandata EVV Employee Portal.	50	String	
11	EmployeeAddress1	Employee's address line 1.	30	String	
12	EmployeeAddress2	Employee's address line 2.	30	String	
13	EmployeeCity	Employee's city.	30	String	
14	EmployeeState	Employee's state.	2	String	
15	EmployeeZipCode	Employee's 9 digit zip code. Format #########.	10	String	
16	EmployeePhone	Employee's phone number.	10	String	
17	EmployeeAltPhone	Employee's alternate phone number.	10	String	
18	EmployeeAltPhone2	Employee's second alternate phone number.	10	String	
19	EmployeeID	Unique identifier for the employee in the source system.	10	String	
20	EmployeeIDCustom1	Customized Employee id.	64	String	
21	EmployeeIDCustom2	Customized Employee id.	64	String	
22	EmployeeSocialSecurity	Employee's Social Security Number. Format determined during implementation.	9	String	
23	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	Decimal	
24	EmployeeHireDate	Employee's Date of Hire. If more than 1, provided latest hire date.		Date	
25	EmployeeEndDate	Employee's HR Recorded end date.		Date	
26	EmployeeBirthDate	Employee's date of birth.		Date	
27	EmployeeGender	Employee's Gender. Values: O=Unknown or Other, M=Male, F=Female.	1	String	

Index	Column Name	Description	Max Length	Type	Required
28	EmployeePrimaryLocation	The Employee's primary location. The values for this field will be defined during implementation.	15	String	
29	Status	Status of an Employee. For delete a record, set to D or leave empty for an insert or update.	1	String	

3.4. Schedule

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ClientIDQualifier	Value being sent to unique identify the client. Values: ClientID, ClientSSN; ClientOtherID, ClientCustomID. Should be the same as the value used by the Payer if a client/member feed is provided by a payer.	20	String	Yes
3	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any unique number can be used for the client. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes
4	EmployeePINQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String	Yes

Index	Column Name	Description	Max Length	Type	Required
5	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system. This value must be all digits and must be unique within the agency. The system will perform optimally if this value is the same length for all employees and should be no less than 4 digits.	9	String	Yes
6	ScheduleID	Unique Identifier for the schedule record from the source system. Used to update the schedule in subsequent transfers.	40	String	Yes
7	ScheduleStartTime	Activity / Schedule start date and time.		DateTime	Yes
8	ScheduleEndTime	Activity / Schedule end date and time.		DateTime	Yes
9	ScheduledDuration	Duration of activity / scheduled visit. This is difference between the scheduled start time and scheduled end time. Provided in minutes.		Decimal	
10	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	
11	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	Decimal	
12	BillRate	Rate for billing. Can have values like 5.043 or 1.23 and should not exceed 6 characters. Decimal point is included in the length.	6	Decimal	
13	ScheduleFlag	Cluster case indicator. Values are 0 – non-clustered and 1 – clustered.	1	String	
14	DutyFree	Special functionality to deduct time not worked from the total. Must be part of the account implementation.	1	String	

Index	Column Name	Description	Max Length	Type	Required
15	Weekend	Week ending day date and time for the schedule provided. Time should be set to all 0s.		DateTime	
16	Discipline	Category of Service provided by the Employee. The values for this field will be defined during implementation.	17	String	
17	Service	Service description. The values for this field will be defined during implementation.	15	String	Condiitional
18	ProcedureCode	This is the billable procedure code. For most programs, it is the HCPCS code.	5	String	
19	ProcCodeQualifier	The procedure code qualifier used in the 837. Most frequent value: 'ZZ'.	2	String	
20	BillCode	The bill code associated with the schedule. Note that this may be the same as or different from the procedure code.	5	String	
21	Modifier1	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	
22	Modifier2	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	
23	Modifier3	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	
24	Modifier4	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String	

Index	Column Name	Description	Max Length	Type	Required
25	Contract	Service Contract information. The values for this field will be defined during implementation.	9	String	
26	Branch	Branch office if applicable. The values for this field will be defined during implementation.	2	String	
27	VisitType	Used for billing. If visit type is set to 'V' it means charge by the visit. If set to some other value it means charge by hours subject to rounding rules. Implementing this feature requires special flags to be enabled for the account.	1	String	
28	LiveInCase	24 hour live-in case. Values are Y or N. Implementing this feature requires special flags to be enabled for the account.	1	String	
29	OTABHours	Special Use.	4	String	
30	OTABCode	Special Use.	2	String	
31	OTABApprover	Special Use.	3	String	
32	CaseNumber	Case number sent as part of the schedule record. Special Use Field.	9	String	
33	CaseSequence	Special Use - Case Sequence. Special Use Field.	4	String	
34	ClientTimeZone	Client's primary time zone. To be provided if time zones could vary within a given account's territory. Please see the appendix for acceptable values.	64	String	
35	ClientStatus	The client's current status. Provide the 2-digit code including the 0. Available values: 02 = Active, 04 = Inactive.	2	String	

Index	Column Name	Description	Max Length	Type	Required
36	ContingencyPlan	Indicator of member's contingency plan selected by member. Valid values include (CODE should be sent only): CODE- Description CP01 - Reschedule within 2 Hours CP02 - Reschedule within 24 Hours CP03 - Reschedule within 48 Hours CP04 - Next Scheduled Visit CP05 - Non-Paid Caregiver	64	String	
37	Reschedule	Indicator if schedule is a "reschedule"	5	Boolean	

3.5. XREF File

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ClientIDQualifier	Value being sent to unique identify the client. Values: ClientID, ClientSSN; ClientOtherID, ClientCustomID. Should be the same as the value used by the Payer if a client feed is provided by the payer.	20	String	
3	ClientID	This must be all digits. The client id is the unique identifier for the patient / client / individual. This can be used to tie the individual to an existing scheduling system OR if the provider does not have an appropriate value any number can be used. This number will be required for entry into the call-in system (telephony, MVV, etc.) system for multi-client cases and when using the FVVD.	10	String	Yes
4	EmployeeQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String	
5	EmployeeID	Unique identifier for the employee in the source system.	10	String	
6	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system. This value must be all digits and must be unique within the agency. The system will perform optimally if this value is the same length for all employees and should be no less than 4 digits.	9	String	Yes

Index	Column Name	Description	Max Length	Type	Required
7	ClientStatus	The client's current status. Provide the 2-digit code including the 0. Available values: 02 = Active, 04 = Inactive. This field is optional if ClientEligibilityDateBegin or ClientEligibilityDateEnd is sent.	2	String	
8	Service	Service description.	12	String	Yes
9	XRefStartDate	Date when the relationship began. If this value is not provided it will be assumed to be the date the record is received.		Date	Yes
10	XRefEndDate	Date when the relationship ended. If this value is not provided, it will be assumed to be ongoing.		Date	

4 Completed Visit Download

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

4.1 Basic Description

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

4.2. Element – tdsTelephonyActivity (Completed Visits)

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

Index	Column Name	Description	Max Length	Type	Required
1	Account	Sandata account number. This number is generated by Santrax as the Provider Account Number. It should be padded with leading zeros to 4 positions (e.g. 0998). It may be up to 10 positions.	10	String	Yes
2	ScheduleID	Unique Identifier for the schedule record from the source system.	40	String	
3	ClientID	The client id is the unique identifier for the patient / client / individual.	10	String	
4	ClientMedicaidId	Unique ID provided by the State Medicaid program to the client.	64	String	
5	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system.	9	String	
6	ActivityDate	Actual start date is the date in UTC format. Time set to 0.		DateTime	
7	ActivityEndDate	Actual end date is the date in UTC format. Time set to 0.		DateTime	
8	ScheduleStartTime	Activity / Schedule start date and time.		DateTime	
9	ScheduleEndTime	Activity / Schedule end date and time.		DateTime	
10	ScheduledDuration	Scheduled duration in minutes. Format HH:MM	5	String	
11	StartTime	Actual visit start time. Format HH:MM	5	String	
12	EndTime	Actual visit end time. Format HH:MM	5	String	

Index	Column Name	Description	Max Length	Type	Required
13	PayMinutes	Pay hours in minutes based on the value entered in Sandata EVV Visit Maintenance.		Decimal	
14	Units	Calculated units based on rules for the specified payer.	999	String	
15	StartType	The type of information used to define the start time. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER	10	String	
16	EndType	The type of information used to define the start time. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER	10	String	
17	StartPhoneNumber	If an IVR call, the phone number from which the phone call was received.	10	String	
18	EndPhoneNumber	If an IVR call, the phone number from which the phone call was received.	10	String	
19	Miles	Visit travel miles if Mileage Tracking is used.	9999.9999	Decimal	
20	ErrandMiles	Visit errand miles if this feature is enabled.	9999.9999	Decimal	
21	TravelTime	Visit travel time in minutes if this feature is enabled.	9999.9999	Decimal	
22	MiscTime	Visit miscellanies time in minutes if this feature is enabled.		Decimal	
23	MoneySpent	Money spent if this feature is enabled		Decimal	
24	PayerName	The full name of the Payer associated with the visit.	64	String	
25	Contract	Service Contract information.	9	String	
26	Discipline	Discipline assigned to the employee.	17	String	
27	Service	Service description.	12	String	
28	CaseNumber	Case number sent as part of the schedule record.	9	String	
29	LiveInFlag	Live in flag. Allowed values are “Y”/”N”.	1	String	

Index	Column Name	Description	Max Length	Type	Required
30	VisitType	Used for billing. If visit type is set to 'V' it means charge by visit. If set to some other value it means charge by hours. Implementing this feature requires special flags to be enabled for the account.	1	String	
31	VisitId	Visit unique key. This value is unique to Sandata's EVV system.	64	String	Yes
32	Department	Employee's department.	3	String	
33	EmployeeId	Unique employee identifier in the source system.	10	String	
34	ApprovalUserName	User Name of approving user	30	String	
35	ApprovalDateTime	Approval Date/Time		DateTime	
36	AdjustedIn	Adjusted Time In		DateTime	
37	AdjustedOut	Adjusted Time Out		DateTime	
38	ESVInScore	EVV In Score (Percentage Probability)	3	String	
39	ESVOutScore	EVV Out Score (Percentage Probability)	3	String	
40	CSVInScore	Client EVV In Score (Percentage Probability)	3	String	
41	CSVOutScore	Client EVV Out Score (Percentage Probability)	3	String	
42	EVVCallInPhoneType	C = Cell, L=Landline, blank = other	1	String	
43	EVVCallOutPhoneType	C = Cell, L=Landline, blank = other	1	String	
44	Memo	The free form memo field from Sandata EVV.	1024	String	
45	CarFare	Car Fare if feature is enabled.	4	String	
46	BillRate	Rate for billing. Can have values like 5.043 or 1.23 and should not exceed 6 characters. Decimal point is included in the length.	6	Decimal	

Index	Column Name	Description	Max Length	Type	Required
47	ProcCodeQualifier	The procedure code qualifier used in the 837. Most frequent value: 'ZZ'	2	String	
48	ProcedureCode	This is the billable procedure code. It can be the HPCS number.	5	String	
49	PayerProgram	The program to which this recipient belongs.	9	String	
50	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	
51	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	
52	Modifier1	First modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	
53	Modifier2	Second modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	
54	Modifier3	Third modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	
55	Modifier4	Fourth modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	
56	VisitLocationType	Type of location for the visit. Possible values include: 1 | 2 (1 = Home; 2 = Community)	2	String	

4.3. Element – Task

Index	Column Name	Description	Max Length	Type	Required
1	VisitId	Visit unique key.	64	String	Yes
2	ScheduleID	Unique Identifier for the schedule record from the source system. Used to update the schedule in subsequent transfers.	40	String	
3	TaskID	Task id, this task id must map to the Task IDs used for the agency in the Sandata system.	4	String	Yes
4	Reading	Task reading.	4	String	
5	Unit	Task unit.	8	String	

5 Appendix

5.1. Assumptions

There is no other external interface other than what is mentioned in this document.

5.2. Other Important Points to Note

In the event of any required changes to the API apart from the functionality covered in this document or the functionality already present in the code, it is recommended that a formal change control process be followed so as to ensure a set process for planning and scheduling, implementation of the same, verification and validation and roll-out for user testing.

5.3. Legend

LEGEND	
Field Name	**Other Possible Naming**
Client	Individual Member Patient
Employee	Caregiver Consumer Directed Employees Employee
Provider	Agency TPA
Payer	Admission Contract Insurance Company Managed Care Organization (MCO) State
Contract	Program Program Code
HCPCS	Bill Code

LEGEND	
Field Name	**Other Possible Naming**
	Procedure Code Service

5.4. Acronyms and Definitions

Term	Definition
AKA	Also Known As.
API	Application Programming Interface.
AR	Accounts Receivable.
GMT	Greenwich Mean Time is the mean solar time at the Royal Observatory in Greenwich, London. GMT was formerly used as the international time standard, now superseded in that function by Coordinated Universal Time.
HTTP	Hypertext Transfer Protocol.
JSON	JavaScript Object Notation.
OTAB	Over Time / Absence – custom functionality for some NY clients.
PIN	Personal Identity Number. AKA Santrax ID. Used for unique identification when dialing into the telephony system.
REST	Representational State Transfer.
SRS	System Requirement Specifications.
SSN	Social Security Number.
TBD	To Be Determined.
Tbl	Table.
UTC	Coordinated Universal Time, abbreviated as UTC, is the primary time standard by which the world regulates clocks and time.
XML	Extensible Markup Language.
XREF	This provides a cross reference between the Client receiving service and the Employee providing service. This is required for Consumer Directed programs. This may be required for non-scheduled programs.

5.5. Time Zone List

This is the common list of time zone we used. If your area is not covered by this list please contact Sandata support to get additional time zone value that we accept. 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
Canada/Mountain	Active
Canada/Newfoundland	Active
Canada/Pacific	Active
Canada/Saskatchewan	Active
Canada/Yukon	Active
America/Puerto_Rico	Inactive

5.6. Technical Companion and Examples

This appendix serves as additional technical documentation for the use of the Sandata OpenEVV APIs.

API Location

The RESTful APIs for intaking data can be reached at the following locations:

Production:
https://api.sandata.com/interfaces/intake/clients/rest/api/v1/evv
https://api.sandata.com/interfaces/intake/employees/rest/api/v1/evv
https://api.sandata.com//interfaces/intake/schedules/rest/api/v1/evv
https://api.sandata.com/interfaces/intake/clients/rest/api/v1/evv/xref

UAT:
https://uat-api.sandata.com/interfaces/intake/clients/rest/api/v1/evv
https://uat-api.sandata.com/interfaces/intake/employees/rest/api/v1/evv
https://uat-api.sandata.com//interfaces/intake/schedules/rest/api/v1/evv
https://uat-api.sandata.com/interfaces/intake/clients/rest/api/v1/evv/xref

The endpoints accept JSON data and support the HTTP POST method.

The RESTful APIs for the completed visits download can be reached at the following location:

Production:
https://api.sandata.com/interfaces/completed-visits-gateway/visits/completed/rest/api/v1

UAT:
https://uat-api.sandata.com/interfaces/completed-visits-gateway/visits/completed/rest/api/v1

Authentication Header

The API endpoints utilize Basic Authentication. Therefore, a valid "Authorization" header must be sent with each request. This header is simply a Base 64 encoded representation of the username and password in the format "username:password".

The credentials are determined and distributed during implementation.

An example header for "user@example.com" with password "secret" would be:

Authorization: Basic dXNlckBleGFtcGxlLmNvbTpzZWNyZXQ=

Account Header

In addition to the "Authorization" header, a header denoting the callers EVV "Account" must be sent.

An example of this header would be:

Account: 12345

Content-Type Header

As with all RESTful API requests, the "Content-Type" header should also be included:

Content-Type: application/json

Workflow

Interacting with the APIs is a two-step process:

Step 1 – Send a POST request with the data to the API

Step 2 – Utilize the "Status" API to check that processing completed successfully

Details are as follows:

The first step is to POST the data being sent to the URLs mentioned above in the "API Location" section. When data is sent, the Sandata system will validate the input meets the business requirements, process the data, and return a response.

The response sends back some key pieces of information. This includes any errors that may have been flagged, as well as a UUID, generated by Sandata, which uniquely identifies the request. See example responses below in the "Sample Response" section.

After this response is sent, the Sandata system begins processing the data into the system. Since the initial POST has already received a response, callers must use a second endpoint to check on the status of their request.

To this end, each API is accompanied by an additional endpoint for checking status. This endpoint is reached simply by appending "/status" to the URLs in the "API Location" section above. Calls to this endpoint must utilize the HTTP GET method and send in the UUID that is returned in the response to the POST call.

An example GET request for status for clients, would be sent as follows:

https://api.sandata.com/interfaces/intake/clients/rest/api/v1/evv/status?uuid=ea1c3296-e1ff-40dd-b718-5c2eda44caf6

Sample data can be found below.

In summary, the caller would POST data to the API, receive a response with a UUID, then utilize the "status" endpoint via GET in order to determine if processing was completed and successful.

Sample POST Data

Below find sample POST bodies for each entity, as well as sample responses in both successful and unsuccessful situations. Note that, based on implementation, not all fields are required to be present. In addition, certain implementations may include custom fields that are not represented in the samples. Please refer to the addendum for a full set of fields and their details.

JSON Client

```
[{
        "Account": "12345",
        "ClientID": "123456789",
        "ClientLastName": "Smith",
        "ClientFirstName": "John",
        "ClientMiddleName": "Peter",
        "MissingMedicaidID": "False",
        "ClientEmailAddress": "dummy@sandata.com",
        "ClientSuffix": "Jr",
        "ClientSSN": "999999999",
        "ClientMedicaidID": "9999999999999",
        "RecipientIDCustom1": "77777",
        "RecipientIDCustom2": "88888",
        "CaseManager": "John Doe",
        "ClientCaseManagerEmail": "John.Doe@example.com",
        "Coordinator": "CRD",
        "ClientMedicalRecordNumber": "999999999999",
        "ARNumber": "9999999999",
        "ProviderAssentContPlan": false,
        "ClientGender": "M",
        "ClientBirthDate": "08021991",
        "ClientMaritalStatus": "S",
        "ClientLanguage": "English",
        "DischargeDate": "2009-03-07",
        "ClientTimeZone": "EST",
        "ClientPriority": "1",
        "Team": "T1",
        "Branch": "C",
        "Borough": "B",
        "Area": "2",
        "ClientAdTypeID": "999",
        "ClientPrimaryDiagnosisCode": "E10.21",
        "BillRate": "1.23",
        "CaseNumber": "999",
        "CaseSequence": "12",
        "MobileDevice": "Y",
        "Status": null,
        "ClientAddressLine1": "123 Sample Dr.",
        "ClientAddressLine2": "Unit 3F",
        "ClientCity": "Williamsburg",
        "ClientState": "NY",
        "ClientZip": "112110000",
        "ClientAddressType": "Home",
        "ClientPayerInformation": [{
                "PayerID": "HHH",
                "PayerProgram": "123",
                "ProcedureCode": "123",
                "ClientPayerID": "999",
                "ClientEligibilityDateBegin": "2018-08-05",
                "ClientEligibilityDateEnd": "2020-08-05",
                "EffectiveStartDate": "2018-08-05",
                "EffectiveEndDate": "2020-08-05",
                "ClientStatus": "02"
        }],
        "ClientDesignees": [{
                "ClientDesigneeFirstName": "Karen",
                "ClientDesigneeLastName": "Brown",
                "ClientDesigneeEmail": "karen@sandata.com",
                "ClientDesigneeStatus": "02",
```

```
                "ClientDesigneeStartDate": "2018-08-05",
                "ClientDesigneeEndDate": "2018-08-06",
                "ClientDesigneeRelationship": "Other"
        }],
        "ClientPhone": [{
                "Account": "29036",
                "ClientID": "1562041750",
                "ClientPhoneType": "Home",
                "ClientPhone": "5559876543"
        }],
        "ClientAddress": [{
                "Account": "29036",
                "ClientID": "1562041750",
                "AddressType": "Home",
                "ClientAddressLine1": "36 West 5th Street",
                "ClientAddressLine2": "10th Floor",
                "ClientCity": "Manhattan",
                "ClientState": "NY",
                "ClientZip": "100170000"
        }],
        "ClientContact": [{
                "Account": "29036",
                "ClientID": "1562041750",
                "ContactLastName": "Smith",
                "ContactFirstName": "Kevin",
                "ContactRelationshipToClient": "Child",
                "ClientContactPhoneType": "Mobile",
                "ContactPhoneNumber": "5551234567",
                "ContactAddressLine1": "777 Dummy Ave",
                "ContactAddressLine2": "Apt 7A",
                "ContactCity": "Farmingdale",
                "ContactState": "NY",
                "ContactZip": "117350000",
                "ContactEmail": "contact@sandata.com"
        }]
}]
```


JSON Employee


```
[{
        "Account": "29036",
        "EmployeePIN": "9999",
        "EmployeeLastName": "White",
        "EmployeeFirstName": "Brian",
        "EmployeeMiddleInitial": "F",
        "Department": "DPT",
        "EmployeeAPI": "99999999",
        "EmployeeType": "C",
        "Discipline": "DISC",
        "EmployeeEmailAddress": "emp@sandata.com",
        "EmployeeAddress1": "777 Fake St",
        "EmployeeAddress2": "Apt 6P",
        "EmployeeCity": "Cleveland",
        "EmployeeState": "OH",
        "EmployeeZipCode": "441010000",
        "EmployeePhone": "5555558787",
        "EmployeeAltPhone": "5555558797",
        "EmployeeAltPhone2": "5555558711",
        "EmployeeID": "9999999999",
        "EmployeeIDCustom1": "9898989898",
```

```
        "EmployeeIDCustom2": "9797979797",
        "EmployeeSocialSecurity": "999999999",
        "PayRate": "1.23",
        "EmployeeHireDate": "09082018",
        "EmployeeEndDate": "10102020",
        "EmployeeBirthDate": "09121983",
        "EmployeeGender": "M",
        "EmployeePrimaryLocation": "Location",
        "Status": null
    }
]
```


JSON Schedule


```
[{
        "Account": "29036",
        "ClientIDQualifier": "ClientID",
        "ClientID": "9999999999",
        "EmployeePINQualifier": "EmployeeCustomID",
        "EmployeePIN": "99999",
        "ScheduleID": "9999999",
        "ScheduleStartTime": "2019-10-05T00:15:37Z",
        "ScheduleEndTime": "2019-10-05T00:16:37Z",
        "ScheduledDuration": "60",
        "ARNumber": "9999999999",
        "PayRate": "1.23",
        "BillRate": "5.043",
        "ScheduleFlag": "1",
        "DutyFree": "1",
        "Weekend": "2019-10-12T00:00:00Z",
        "Discipline": "DISC",
        "Service": "SERV",
        "ProcedureCode": "1234",
        "ProcCodeQualifier": "ZZ",
        "BillCode": "1234",
        "Modifier1": null,
        "Modifier2": null,
        "Modifier3": null,
        "Modifier4": null,
        "Contract": "CONT",
        "Branch": "1",
        "VisitType": "V",
        "LiveInCase": "N",
        "OTABHours": "9999",
        "OTABCode": "99",
        "OTABApprover": "APP",
        "CaseNumber": "999999999",
        "CaseSequence": "9999",
        "ClientTimeZone": "US/Alaska",
        "Status": "02",
        "ContingencyPlan": "CP01",
        "Reschedule": false
    }
]
```


JSON XREF


```
[
    {
        "Account": "29036",
```

```
        "ClientIDQualifier": "ClientID",
        "ClientID": "9999999999",
        "EmployeeQualifier": "EmployeeSSN",
        "EmployeePIN": "111111111",
        "EmployeeID": "111111111",
        "ClientStatus": "04",
        "Service": "SERV",
        "XRefStartDate": "2018-09-12",
        "XRefEndDate": "2018-10-10"
    }
]
```

Sample Responses

See some sample responses below. Note that the samples are provided for employee, but the same pattern is followed for client, schedule and XREF.

Employee POST (Successful)

```
{
  "id": "9706f808-5734-4f1b-90cc-d62ff7cc176d",
  "status": "SUCCESS",
  "messageSummary": "The result for the input UUID is not ready yet. Please try again.",
  "data": {
    "uuid": "7f6dcd1a-ec5e-4efd-a2d4-1049756016a5",
    "account": "29036",
    "message": "The result for the input UUID is not ready yet. Please try again.",
    "reason": "Transaction Received."
  }
}
```

Employee POST (Validation Error)

```
{
  "id": "4a25ab94-da9b-4332-8a93-2a2efed2fce1",
  "status": "FAILED",
  "messageSummary": "[1] Records uploaded, please check errors/warnings and try again.",
  "data": [
    {
      "Account": "29036",
      "EmployeePIN": "9999",
      "EmployeeLastName": "White",
      "EmployeeFirstName": "Brian",
      "EmployeeMiddleInitial": "F",
      "Department": "DPT",
      "EmployeeAPI": "99999999",
      "EmployeeType": "C",
      "Discipline": "DISC",
      "EmployeeEmailAddress": "emp@sandata.com",
      "EmployeeAddress1": "777 Fake St",
      "EmployeeAddress2": "Apt 6P",
      "EmployeeCity": "Cleveland",
      "EmployeeState": "OH",
      "EmployeeZipCode": "441010000",
      "EmployeePhone": "5555558787",
      "EmployeeAltPhone": "5555558797",
      "EmployeeAltPhone2": "5555558711",
      "EmployeeID": "9999999999",
      "EmployeeIDCustom1": "9898989898",
```

```
      "EmployeeIDCustom2": "9797979797",
      "EmployeeSocialSecurity": "999999999",
      "PayRate": 1.23,
      "EmployeeHireDate": "09082018",
      "EmployeeEndDate": "10102020",
      "EmployeeBirthDate": "09121983",
      "EmployeeGender": "Q",
      "EmployeePrimaryLocation": "Location",
      "Status": null,
      "VendorCode": null,
      "RegisterDevice": null,
      "ErrorCode": null,
      "ErrorMessage": "ERROR: The EmployeeGender expected format is not correct. The record should
satisfy this regular expression ['O|M|F']. The record is being rejected. Invalid Value='Q'."
    }  ]
}
```


Employee GET (Status)

A sample response to a status GET request that has finished processing is:


```
{
       "id": "dece6720-8484-4049-a91f-cd409977eadc",
       "status": "SUCCESS",
       "messageSummary": "All records updated successfully.",
       "data": {
              "uuid": "dece6720-8484-4049-a91f-cd409977eadc",
              "account": null,
              "message": "All records updated successfully.",
              "reason": "Transaction Received."
       }
}
```


If the request is not yet finished being processed, the "messageSummary" will be "The result for the input UUID is not ready yet. Please try again."


```
{
       "id": "9706f808-5734-4f1b-90cc-d62ff7cc176d",
       "status": "SUCCESS",
       "messageSummary": "The result for the input UUID is not ready yet. Please try again.",
       "data": {
              "uuid": "7f6dcd1a-ec5e-4efd-a2d4-1049756016a5",
              "account": "29036",
              "message": "The result for the input UUID is not ready yet. Please try again.",
              "reason": "Transaction Received."
       }
}
```


If the request was processed but failed business rules, an example status would be:


```
{
  "id": "1e7ba694-b48f-447a-9260-511f7e973c3f",
  "status": "SUCCESS",
  "messageSummary": "[2] Records uploaded, please check errors/warnings and try again.",
  "data": [
    {
      "Account": "29036",
      "EmployeePIN": "9989",
```

```
    "EmployeeLastName": "White",
    "EmployeeFirstName": "Brian",
    "EmployeeMiddleInitial": "F",
    "Department": "DPT",
    "EmployeeAPI": "99999999",
    "EmployeeType": "C",
    "Discipline": "DISC",
    "EmployeeEmailAddress": "emp@sandata.com",
    "EmployeeAddress1": "777 Fake St",
    "EmployeeAddress2": "Apt 6P",
    "EmployeeCity": "Cleveland",
    "EmployeeState": "OH",
    "EmployeeZipCode": "441010000",
    "EmployeePhone": "5555558787",
    "EmployeeAltPhone": "5555558797",
    "EmployeeAltPhone2": "5555558711",
    "EmployeeID": "9999999999",
    "EmployeeIDCustom1": "9898989898",
    "EmployeeIDCustom2": "9797979797",
    "EmployeeSocialSecurity": "999999999",
    "PayRate": 1.23,
    "EmployeeHireDate": "09082018",
    "EmployeeEndDate": "10102020",
    "EmployeeBirthDate": "09121983",
    "EmployeeGender": "M",
    "EmployeePrimaryLocation": "Location",
    "Status": null,
    "VendorCode": null,
    "RegisterDevice": null,
    "ErrorCode": "-1043",
    "ErrorMessage": "Another worker exists with the passed unique worker identifier"
  }
]}
```

Completed Visits Download

Downloading completed visits is a multistep process:

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

Headers

The same set of headers (Account, Authentication, Content-Type) should be used as described above.

Request Completed Visits

Utilizing the URL defined in the "API Location" section, callers can issue a GET request to initiate the request for completed visits. The GET request accepts two URL parameters, representing the date/time range for the query:

https://api.sandata.com/interfaces/completed-visits-gateway/visits/completed/rest/api/v1?**start_date_time**=2018-01-01 00:00:00&**end_date_time**=2018-10-02 00:00:00

This call will return a JSON response:

```
{
  "id": "ca590b76-fe4a-4037-adeb-aa3c7f21a446",
  "sessionId": "f68f1502-2cb8-4c2e-9b9e-4623f8ac0738",
  "statusTrackingDescription": [
    "INIT: Trigger is queued!"
  ]
}
```

The response lets the caller know their request has been received and returns an ID to track progress and get results (sessionId).

Status Endpoint

Use the sessionId from the initial query to check the readiness of the visits by issuing a GET request to the status API:

https://api.sandata.com/interfaces/completed-visits-gateway/visits/completed/rest/api/v1/status?session_id=f68f1502-2cb8-4c2e-9b9e-4623f8ac0738

The response lets the caller know if the process of collecting the requested visits is complete:

```
{
  "id": "1082e768-d8fa-4d0b-a40b-7762b3873e17",
  "status": "SUCCESS",
```

```
  "sessionId": "f68f1502-2cb8-4c2e-9b9e-4623f8ac0738",
  "statusTrackingDescription": [
    "INIT: Trigger is queued!",
    "IN_PROGRESS: Consumed the trigger export and start to collect visits data",
    "SUCCESS: DONE and READY for pulling Completed visits"
  ],
  "totalRows": 10
}
```


The presence of the "SUCCESS" element in the JSON message above indicates that the data is ready.

Paging Endpoint

The same sessionId used by the status endpoint can be used to download the raw visit data in pages. The pagination of the data in the JSON response can be customized with the page_size and page_number url parameters:

https://api.sandata.com/interfaces/completed-visits-gateway/visits/completed/rest/api/v1/page?session_id=f68f1502-2cb8-4c2e-9b9e-4623f8ac0738&**page_size**=5&**page_number**=1

Data Example

The paging endpoint returns the status information, as well as an additional "data" element, which will contain a list of visits matching the criteria specified:


```
{
  "id": "0a4bfd24-01a8-47f9-9ad0-ad6475191abd",
  "status": "SUCCESS",
  "sessionId": "f68f1502-2cb8-4c2e-9b9e-4623f8ac0738",
  "statusTrackingDescription": [
    "INIT: Trigger is queued!",
    "IN_PROGRESS: Consumed the trigger export and start to collect visits data",
    "SUCCESS: DONE and READY for pulling Completed visits"
  ],
  "totalRows": 10,
  "page": 1,
  "pageSize": 5,
  "data": [
    {
      "Account": "12345",
      "ScheduleID": null,
      "ClientID": "999999999",
      "ClientMedicaidId": "9999999",
      "EmployeePIN": "999999999",
      "ActivityDate": "2018-07-13T00:00:00Z",
      "ActivityEndDate": "2018-07-13T00:00:00Z",
      "ScheduleStartTime": null,
      "ScheduleEndTime": null,
      "ScheduledDuration": "00:00",
      "StartTime": "05:00",
      "EndTime": "08:30",
      "PayMinutes": 210,
      "Units": null,
      "StartType": "MANUAL",
      "EndType": "MANUAL",
      "StartPhoneNumber": null,
```

```
      "EndPhoneNumber": null,
      "Miles": null,
      "ErrandMiles": null,
      "TravelTime": null,
      "MiscTime": null,
      "MoneySpent": null,
      "PayerName": "Dummy Payer Name",
      "Contract": null,
      "Discipline": null,
      "Service": null,
      "CaseNumber": "999999",
      "LiveInFlag": "N",
      "VisitType": null,
      "VisitId": "9999999999",
      "Department": "DEV",
      "EmployeeId": "9999999999",
      "ApprovalUserName": "SANTRAX",
      "ApprovalDateTime": "2018-07-26T17:23:50Z",
      "AdjustedIn": null,
      "AdjustedOut": null,
      "ESVInScore": null,
      "ESVOutScore": null,
      "CSVInScore": null,
      "CSVOutScore": null,
      "EVVCallInPhoneType": null,
      "EVVCallOutPhoneType": null,
      "Memo": null,
      "CarFare": null,
      "BillRate": null,
      "ProcCodeQualifier": null,
      "ProcedureCode": null,
      "PayerProgram": null,
      "PayRate": null,
      "ARNumber": null,
      "Modifier1": null,
      "Modifier2": null,
      "Modifier3": null,
      "Modifier4": null,
      "VisitLocationType": "1"
    },
// Rest of data truncated for documentation purposes
  ]
}
```