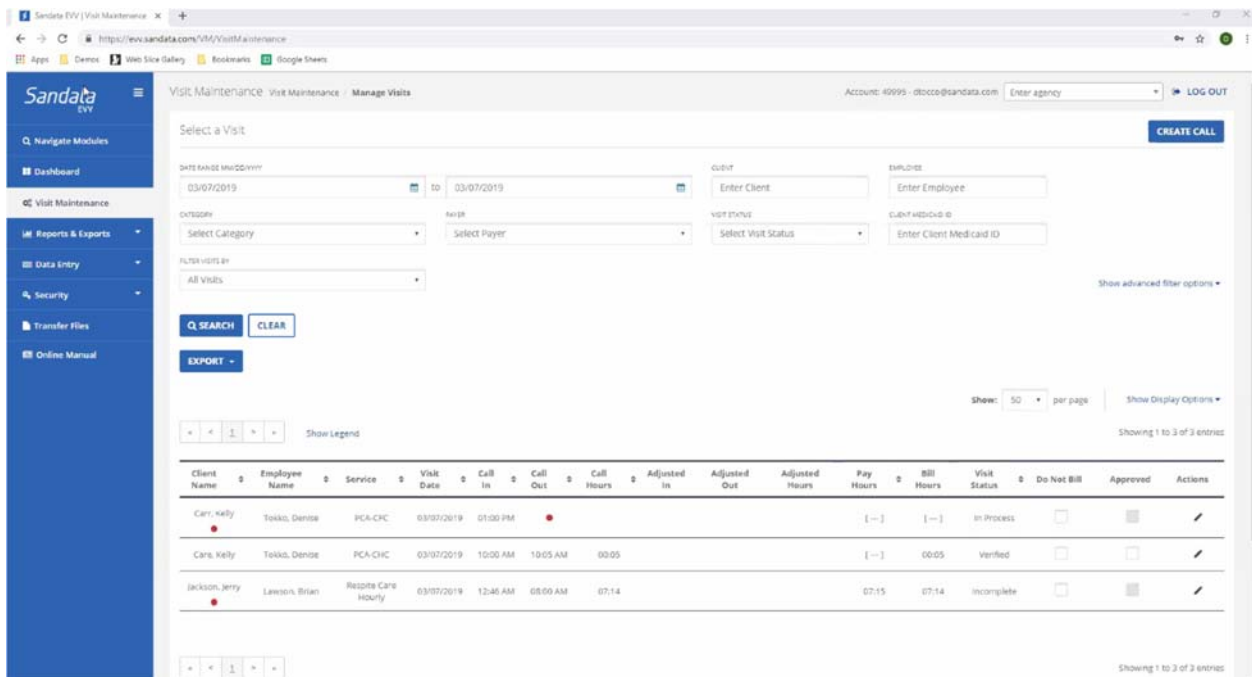RI-EOHHS CDS OpenEVV clarifications and questions from Sandata

Please note: RI-EOHHS CDS implementation does not including Scheduling, Service Authorizations, Billing or Claims Validation. Sandata is implementing the Fiscal Management Portal and Aggregator platforms for the Fiscals and EOHHS.

Sandata anticipates the Fiscals will be sending Client, Employee and a Client/Employee cross-reference data to load in our systems. This data will be viewable and editable in the Fiscal Management Portal. The same data is only viewable in the Aggregator. Reporting is available in both systems.

Below is a sample of the Fiscal Portal.

The Fiscal will be able to view and maintain visit data, transfer files (import data via this specification), report on the data and export completed visits (visits in the Verified status).

As you can see from the image, it is important to have consistent identifiers for the Clients and Employees and as they appear in the cross-reference data. Multiple identifiers could result in multiple visit records that may appear to be duplicates but behind the scenes they are distinct records according to the identifiers.

Fiscals will also be able to clear exceptions (sample screen below) under Visit Maintenance

History is also available for any changes to visits.

The specification and addendum describe the required fields, files and field formats, and Sandata can address any questions from the Fiscals. Items grayed out will not be required on the file feeds to Sandata.

Below are some notes and questions on the optional fields to help add clarity.

Section 2.1 Account number will be provided by Sandata and must be used to identify the agency and used for consistency in the system.

Section 2.2 Client information is required and the ClientID must match a record on the cross-reference file.

- ClientEmailAddress is not required as the Sandata Member portal is not being implemented.

- If the agency wants to include associated agency personnel, CaseManager, ClientCaseManagerEmail and Coordinator can be provided for agency purposes.
- The agency may also provide client demographics (ClientGender thru DischargeDate) for agency purposes.

Section 2.2.1 Client Payer Information

- RI-EOHHS CDS implementation does not include billing or scheduling. ClientPayerID is for the agency's purposes. ClientEligibility thru EffectiveEndDate are optional but can be used for the agency's purposes.

Section 2.2.4 Client Contact is optional and may be used if there is an alternative person needed, similar to an emergency contact.

Section 2.3 Employee is the Caregiver.

- The Account will be that of the agency.
- Sandata will provide the caregiver with a unique EmployeePIN used for providing Sandata with visit data.
- EmployeeType and Discipline are optional and may be used for agency purposes.
- EmployeeEmailAddress is required if the caregiver is using Sandata Mobile application SMC.
- EmployeeSocialSecurity is recommended but if not available, please provide a unique 9 digit number.
- PayRate thru Status are optional fields and may be used for the agency's purposes.

Section 2.5 XREF File is used to associate clients with caregivers.

- For uniqueness and consistency, Sandata recommends using "ClientMedicaidID" as the ClientIDQualifier for the associated value in ClientID
- For uniqueness and consistency, Sandata recommends using "EmployeeSSN" as the EmployeeQualifier for the associated value in EmployeeID.

ClientID should be unique. If the agency does not have a Medicaid ID, what 10-digit value will be used consistently to identify the Client?

Do any of the agency's clients belong to other Fiscal Agents, and will their ClientID be unique for each agency?

EmployeeID should be unique. If the agency does not have a SSN, what 9-digit value will be used consistently to identify the Caregivers?

Do any of the agency's caregivers work for other Fiscal Agents, and will their EmployeeID be unique for each agency?