RIEOHHS CDS Open EVV – EVV Addendum v1.4

Addendum to OpenEVV – EVV System Specification v7.10

Sandata

Version Update

Version	Author	Section	Changes	Date
v1.0	Pamela Brooks	All	Initial Draft	04.13.2020
v1.1	Pamela Brooks	2.2	Updated expected value for ClientID (Index 2) Added to Appendix 4 three new Exception Codes: 28 Visit Verification and 40 Service Verification exceptions	04.28.2020
V1.2	Pamela Brooks	Appendix 2	Addition of new service code T2017 L9, U2	01.19.2021
V1.3	Ford Simpkins	Appendix 2	Reformatting of All tables and text. Addition of new service codes T2017 UN, UD, U2, U8 and T2017 UD, U2, U8	08.14.2022
V1.3	Ford Simpkins	Appendix 2	Change of Program from CDI to CDP for service codes T2017 UN, UD, U2, U8 and T2017 UD, U2, U8	08.24.2022

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1 Overview

The OpenEVV-EVV 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 cross-reference, 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.

This addendum is intended to document any additional required attributes and the attributes for the specification that have values specific for your program pertaining to the OpenEVV-EVV API.

Complete OpenEVV-EVV interface transmission guidelines may be found in the generic specification.

1.1 Intended Audience

The intended audience of this document is:
- Project Management and Technical teams at Sandata.
- Project Management and Technical teams who will be implementing this interface.

1.2 Open-EVV EVV API Transmission Guidelines

- File Format: JSON
- File Delivery: via RESTful API

1.3 Program Specific Assumptions & Business Policies

- o Export Mode: 2 – All non-previously exported visits (updated visits still can export again)

2 Data File Layout

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.

Required Segment Definitions:
- Data segments may be required or optional. When sending data included in a particular segment, all required fields must be provided.
- If a data segment is optional and will not be sent, you may disregard all data fields including those that are required. The concept of required fields only applies when any given data segment is being sent to Sandata.

Required Field Definitions:
- Required – data element *must* be provided on the import file, otherwise, the record will be rejected.
- Optional – vendor may choose to send data element or not. If an optional field is being sent, ensure it is included in the header record. Record will not be rejected if this field is null.

Conditional – specific scenarios exist where this field is required, other scenarios exist where this field may not apply and should not be sent. Conditional rules (or scenarios) will be detailed in the field description.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
Provider Identification: Required. Note that this 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. As part of the implementation process, required fields may be adjusted and the available fields may be reduced based on the program specifics.						
1	ProviderQualifier	Identifier being sent as the unique identifier for the provider. Values: SandataID, NPI, API, MedicaidID, TaxID, Taxonomy, Legacy, Other.	20	String	Yes	NPI
2	ProviderID	Unique identifier for the agency.	64	String	Yes	Provider NPI Value
Client General Information: Additional fields may be required depending on the program; fields below may be ignored if a Payer Client feed is implemented.						
1	ClientID	Assigned client_id. If a value is assigned by another system. Note that this value can be automatically assigned by Sandata EVV.	10	String	Optional	SANDATA ASSIGNED
2	ClientFirstName	Client's First Name.	30	String	Yes	LIVE DATA
3	ClientMiddleInitial	Client's Middle Initial	1	String	Optional	LIVE DATA
4	ClientLastName	Client's Last Name.	30	String	Yes	LIVE DATA
5	ClientQualifier	Value being sent to unique identify the client. Should be the same as the value used by the Payer if a client feed is provided by the payer.	20	String	Yes	ClientOtherID

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
6	ClientMedicaidID	Unique ID provided by the State Medicaid program to the client.	64	String	Yes	10 DIGITS
7	ClientIdentifier	Payer assigned client identifier identified by ClientQualifier. If client information is received from the payer, this information will be used to link the received Third Party EVV information with the payer information provided.	64	String	Yes	Value for ClientMedicaidID 10 DIGITS
8	MissingMedicaidID	Indicator that a patient is a newborn. If this value is provided, ClientMedicaidID will be ignored and will be valid as null.	5	String	Optional	True	False
9	SequenceID	The Third Party EVV visit sequence ID to which the change applied.	16	Integer	Yes	If TIMESTAMP is used: YYYYMMDDHHMMSS (Numbers only; no characters)
10	ClientCustomID	Additional client user-defined ID. Commonly used to customize the built-in ClientID within the system. Must be provided if billing is in scope. May be equal to another ID provided.	24	String		DO NOT PROVIDE
11	ClientOtherID	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 record during import. During implementation it will be determined if this value or the ClientSSN will be used for matching.	24	String	Conditional	Value for ClientMedicaidID 10 DIGITS
12	ClientSSN	Client's social security number. If the field is left empty, ClientOtherID must be populated. Not required if ClientOtherID sent. Numbers only, no dashes and leading zeros must be included. May be required if needed for billing. Format #########	9	String		DO NOT PROVIDE
13	ClientTimeZone	Client's primary time zone. Depending on the program, this value may be defaulted or automatically calculated. Please see the appendix for acceptable values.	64	String	Yes	See Appendix 3

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
14	Coordinator	The staff member assigned to the client in a specific agency as the coordinator (supervisor) for an employee.	3	String	Optional	LIVE DATA
15	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		DO NOT PROVIDE
Client Payer Information: This segment is only required for programs where members/clients and their association to the associated programs and services is not provided by the payer (within authorization data). DO NOT PROVIDE						
1	PayerID	Sandata EVV assigned ID for the payer.	64	String	Yes	DO NOT PROVIDE
2	PayerProgram	If applicable, the program to which this visit belongs.	9	String	Yes	DO NOT PROVIDE
3	ProcedureCode	This is the billable procedure code which would be mapped to the associated service.	5	String	Yes	DO NOT PROVIDE
4	ClientPayerID	Unique identifier sent by the payer.	20	String	Optional	DO NOT PROVIDE
5	ClientEligibilityDateBegin	Client eligibility begin date. This field is optional if ClientStatus is sent.	10	Date	Conditional	DO NOT PROVIDE
6	ClientEligibilityDateEnd	Client eligibility end date. This field is optional if ClientStatus is sent.	10	Date	Conditional	DO NOT PROVIDE
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	Conditional	DO NOT PROVIDE
8	EffectiveStartDate	The effective start date for the client payer information.	10	Date	Yes	DO NOT PROVIDE
9	EffectiveEndDate	The effective end date for the client payer information.	10	Date	Optional	DO NOT PROVIDE
Client Address: At least one record for each client is required if GPS validation is required for the program. If an address is provided via a payer feed, this address information will be regarded as secondary based on program rules.						
1	ClientAddressType	Client address. Note that multiple of the same type of address can be provided.	12	String	Yes	Home| Business	Other
2	ClientAddressIsPrimary	One address must be designated as primary. Values: true/false	5	String	Yes	True	False

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
3	ClientAddressLine1	Street Address Line 1 associated with this address. PO Box may not be acceptable for Billing and PO Box will not function correctly for MVV.	30	String	Yes	LIVE DATA
4	ClientAddressLine2	Street address line 2 associated with this address.	30	String	Optional	LIVE DATA
5	ClientCounty	County associated with this address	25	String	Optional	LIVE DATA
6	ClientCity	City associated with this address.	30	String	Yes	LIVE DATA
7	ClientState	State associated with this address. Two Character standard abbreviation.	2	String	Yes	Format: 2 char standard state abbreviation
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 (e.g. #####0000).	9	String	Yes	Format: #########
9	ClientAddressLongitude	Calculated for each address.	20	Decimal	Optional	LIVE DATA
10	ClientAddressLatitude	Calculated for each address.	19	Decimal	Optional	LIVE DATA
Client Phone: Optional.						
1	ClientPhoneType	Client Phone. Note that multiple of the same type can be provided.	12	String	Optional	Home | Mobile | Business | Other
2	ClientPhone	Client phone number.	10	String	Required	FORMAT: ##########
Client Designee: provide if applicable for the client and in the absence of a payer client feed. Optional. DO NOT PROVIDE						
1	ClientDesigneeFirstName	First Name of the Client Designee.	30	String	Yes	DO NOT PROVIDE
2	ClientDesigneeLastName	Last Name of the Client Designee.	30	String	Yes	DO NOT PROVIDE
3	ClientDesigneeEmail	Email address of the Client Designee.	50	String	Yes	DO NOT PROVIDE
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 or 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 future dated) Available Values: 02 = Active, 04 = Inactive.	2	String	Conditional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
5	ClientDesigneeStartDate	The date Client Designee was assigned. Future date is not acceptable. If the ClientDesigneeStartDate is sent, ClientDesigneeStatus is not required.	10	Date	Conditional	DO NOT PROVIDE
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.	10	Date	Conditional	DO NOT PROVIDE
7	ClientDesigneeRelationship	Relationship of the Designee to the client.	30	String	Optional	DO NOT PROVIDE
Responsible Party: Provide if applicable for the client and in the absence of a payer client feed. Optional.
1	ClientContactType	Client contact type	12	String	Optional	Family | Other
2	ClientContactFirstName	Client contact first name. Entered by provider agency.	30	String	Optional	LIVE DATA
3	ClientContactLastName	Client contact last name. Entered by provider agency.	30	String	Optional	LIVE DATA
4	ClientContactPhoneType	Client contact's phone type.	12	String	Optional	Business | Home | Mobile | Other
5	ClientContactPhone	Client contact home phone number. Entered by provider agency.	10	String	Optional	FORMAT: ##########
6	ClientContactEmailAddress	Client Contact's email address. Required if this client will be authorized to login to the client portal as the client's authorized representative and approve timesheets on behalf of the client.	64	String	Optional	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.
7	ClientContactAddressLine1	Client contact's street address, line 1	30	String	Optional	LIVE DATA
8	ClientContactAddressLine2	Client contact's street address, line 2	30	String	Optional	LIVE DATA
9	ClientContactCity	Client contact's city	30	String	Optional	LIVE DATA
10	ClientContactState	Client contact's state. Two character standard abbreviation.	2	String	Optional	Format: 2 char standard state abbreviation
11	ClientContactZip	Client contact's zip code. 9 digit primary address zip code. If additional 4 digits are not known, provide zeros (e.g. #####0000).	9	String	Optional	Format: #########
Employee General Information: Optional.
1	EmployeeQualifier	Value being sent to unique identify the employee.	20	String	Yes	EmployeeCustomID

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
2	EmployeeIdentifier	Employee identifier identified by EmployeeQualifier. If employee information is received from the payer, this information will be used to link the received Third Party EVV information with the payer information provided and should be defined as the same value.	9	String	Yes	Employee FULL SSN
3	EmployeeOtherID	Unique employee identifier in the external system.	64	String	Optional	DO NOT PROVIDE
4	SequenceID	The Third Party EVV visit sequence ID to which the change applied	16	Integer	Yes	If TIMESTAMP is used: YYYYMMDDHHMMSS (Numbers only; no characters)
5	EmployeeSSN	Employee Social Security Number. Employee SSN may be required depending on the program rules.	9	String	Yes	FORMAT: ######### FULL SSN NOTE: THIS IS A REQUIRED FIELD
6	EmployeeLastName	Employee's Last Name	30	String	Yes	LIVE DATA
7	EmployeeFirstName	Employee's First Name	30	String	Yes	LIVE DATA
8	EmployeeEmail	Employee's Email Address	64	String	Optional	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.
9	EmployeeManagerEmail	Email of the employee's manager	64	String	Optional	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.
10	EmployeeAPI	Employee client's alternate provider identifier or Medicaid ID	25	String	Optional	DO NOT PROVIDE
11	EmployeePosition	Valid values include: HHA, HCA, RN, LPN, PCA If multiple positions, send primary.	3	String	Optional	HHA | HCA | RN | LPN | PCA
12	EmployeeHireDate	Employee's date of hire.	10	Date	Optional	Format: YYYY-MM-DD
13	EmployeeEndDate	Employee's HR recorded end date.	10	Date	Optional	Format: YYYY-MM-DD
Visit General Information: Required.						
1	VisitOtherID	Visit identifier in the external system	50	String	Yes	LIVE DATA

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
2	SequenceID	The Third Party EVV visit sequence ID assigned to this record.	16	Integer	Yes	If TIMESTAMP is used: YYYYMMDDHHMMSS (Numbers only; no characters)
3	EmployeeQualifier	Value being sent to unique identify the employee.	20	String	Yes	EmployeeSSN
4	EmployeeOtherID	Unique employee identifier in the external system, if any.	64	String	Optional	DO NOT PROVIDE
5	EmployeeIdentifier	Employee identifier identified by EmployeeQualifier. If employee information is received from the payer, this information will be used to link the received Third Party EVV information with the payer information provided and should be defined as the same value.	9	String	Yes	EMPLOYEE FULL SSN
6	GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group.	6	String	Optional	LIVE DATA
7	ClientIDQualifier	Value being sent to unique identify the client. Should be the same as the value used by the Payer if a client feed is provided by the payer.	20	String	Yes	ClientOtherID
8	ClientID	Identifier used in the client element.	64	String	Yes	SANDATA ASSIGNED
9	ClientOtherID	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 record during import.	24	String	Optional	Value for ClientMedicaidID
10	VisitCancelledIndicator	True/false – allows a visit to be cancelled / deleted based on defined rules.	5	String	Yes	True | False
11	PayerID	Sandata EVV assigned ID for the payer.	64	String	Yes	See Appendix 1 PayerID column
12	PayerProgram	The program associated to the visit.	9	String	Yes	See Appendix 1 ProgramID column
13	ProcedureCode	This is the billable procedure code which would be mapped to the associated service.	5	String	Yes	See Appendix 2 HCPCS column
14	Modifier1	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed.	2	String	Optional	See Appendix 2 Modifier columns

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
15	Modifier2	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed.	2	String	Optional	See Appendix 2 Modifier columns
16	Modifier3	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed.	2	String	Optional	See Appendix 2 Modifier columns
17	Modifier4	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed.	2	String	Optional	See Appendix 2 Modifier columns
18	VisitTimeZone	Visit primary time zone. Depending on the program, this value may be defaulted or automatically calculated. Should be provided if the visit is occurring in a time zone other than that of the client.	64	String	Yes	See Appendix 3 for valid values
19	ScheduleStartTime	Activity / Schedule start date and time. This field is generally required but may be omitted if the schedule is denoting services that can happen at any time within the service date	20	DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
20	ScheduleEndTime	Activity / Schedule end date and time. This field is generally required but may be omitted if the schedule is denoting services that can happen at any time within the service date	20	DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
21	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	Optional	DO NOT PROVIDE
22	Reschedule	Indicator if schedule is a "reschedule"	5	Boolean	Optional	DO NOT PROVIDE
23	AdjinDateTime	Adjusted in date/time if entered manually. Otherwise the actual date/time received. Adjusted times are used when a visit was captured with or record with incorrect times. For instance, a caregiver forgets to sign out of a current visit for several hours. The agency can "adjust" the time to reflect the actual visit times. In Sandata systems when visit time is adjusted the system will update the adjusted time In and out for that record.	20	DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
24	AdjOutDateTime	Adjusted out date/time if entered manually. Otherwise the actual date/time received. Adjusted times are used when a visit was captured with or record with incorrect times. For instance, a caregiver forgets to sign out of a current visit for several hours. The agency can "adjust" the time to reflect the actual visit times. In Sandata systems when visit time is adjusted the system will update the adjusted time In and out for that record.	20	DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
25	BillVisit	True/False. If the visit is going to be billed, should be sent as Y. Otherwise N.	5	String	Optional	True | False
26	HoursToBill	Hours that are going to be billed.	99.999	Decimal	Optional	LIVE DATA
27	HoursToPay	If payroll is in scope for the payer program, the hours to pay.	99.999	Decimal	Optional	LIVE DATA
28	Memo	Associated free form text	512	String	Optional	LIVE DATA
29	ClientVerifiedTimes	The three fields work together in the Sandata system and generate an exception if the client validation and signature are not captured at the time of visit. The agency would need to provide details why the client did not confirm the visit times, tasks and/or why a signature was not obtained. Often, this gets triggered when the member receiving service is not available at the time the visit ends. Exception Note: When this field is marked as FALSE, a Visit Verification Exception will be triggered.	5	String	Optional	True | False
30	ClientVerifiedTasks	The three fields work together in the Sandata system and generate an exception if the client validation and signature are not captured at the time of visit. The agency would need to provide details why the client did not confirm the visit times, tasks and/or why a signature was not obtained. Often, this gets triggered when the member receiving service is not available at the time the visit ends.	5	String	Optional	True | False

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
31	ClientVerifiedService	The three fields work together in the Sandata system and generate an exception if the client validation and signature are not captured at the time of visit. The agency would need to provide details why the client did not confirm the visit times, tasks and/or why a signature was not obtained. Often, this gets triggered when the member receiving service is not available at the time the visit ends. Exception Note: When this field is marked as FALSE, a Visit Verification Exception will be triggered.	5	String	Optional	True | False
32	ClientSignatureAvailable	The actual signature will not be transferred. The originating system will be considered the system of record. The fields are marked as optional as the data cannot be captured once the visit is complete; therefore, the field will be blank. In this case, an exception will need to accompany the visit records stating why the data is missing or why the caregiver was unable to gather this during the visit. Exception Note: When this field OR ClientVoiceRecording is marked as FALSE, an Client Signature Exception will be triggered.	5	String	Optional	True | False
33	ClientVoiceRecording	The actual voice recording will not be transferred. The originating system will be considered the system of record. Exception Note: When this field OR ClientSignatureAvailable is marked as FALSE, an Client Signature Exception will be triggered.	5	String	Optional	True | False
Calls: If calls are not provided, adjusted times must be included in the parent visit element. Calls include any type of clock in or clock out depending on system capabilities. Note that some vendor systems may not record some visit activity as calls. If this is the case, the call element can be omitted. Sandata will treat visit information without calls as manually entered. This is an OPTIONAL segment.						
1	CallExternalID	Call identifier in the external system	16	String	Yes	LIVE DATA
2	CallDateTime	Event date time. Must be at least to the second.	20	Date Time	Yes	FORMAT: YYYY-MM-DDTHH:MM:SSZ
3	CallAssignment	Description of the call for EVV purposes.	10	String	Yes	Time In | Time Out | Other

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
4	GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group. This is a unique identifier sent from the vendor system which is associated to all members of the group visit.	6	String	Optional	LIVE DATA
5	CallType	The type of device used to create the event. Any call with GPS data collected should be identified as Mobile. FVV should be used for any type of Fixed verification device.	20	String	Yes	Telephony | Mobile | FVV | Manual | Other
6	ProcedureCode	This is the billable procedure code which would be mapped to the associated service.	5	String	Yes	See Appendix 2 HCPCS column
7	ClientIdentifierOnCall	If a client identifier was entered on the call, this value should be provided.	10	String	Optional	LIVE DATA
8	MobileLogin	Login used if a mobile application is in use for GPS calls. Required if CallType = Mobile.	64	String	Conditional	LIVE DATA
9	CallLatitude	GPS latitude recorded during event. Latitude has a range of -90 to 90 with a 15 digit precision. Required for CallType = Mobile Exception Info: If CallLatitude and CallLongitude are outside of the 1 mile radius for the visit location in the ClientAddress section, you will receive the GPS Distance Exception.	19	Decimal	Conditional	LIVE DATA
10	CallLongitude	GPS longitude recorded during event. Longitude has a range of -180 to 180 with a 15 digit precision. Required for CallType = Mobile. Exception Info: If the CallLatitude and CallLongitude is outside of the 1 mile radius for one of the address's listed in the ClientAddress section, you will receive the GPS Distance Exception.	20	Decimal	Conditional	LIVE DATA
11	Location	Specific values to be provided based on the program.	25	String	Optional	LIVE DATA
12	TelephonyPIN	PIN for telephony. Identification for the employee using telephony. Required if CallType = Telephony.	9	String	Conditional	LIVE DATA

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
13	OriginatingPhoneNumber	Originating phone number for telephony. Note: If this phone number does not match a phone number associated with the client, an Unmatched Client ID / Phone Exception will be returned. Required if CallType = Telephony.	10	String	Conditional	FORMAT: ##########
Visit Exception Acknowledgement: This is a CONDITIONAL segment and must be sent when exceptions exist (e.g. If ClientVerifiedService is sent as FALSE, then this section needs to be sent to clear the exception in our system. Otherwise, the visit will not process.)						
1	ExceptionID	ID for the exception being acknowledged. Exact values for exceptions implemented are based on program rules.	2	String	Required	See Appendix 5 ExceptionCode column
2	ExceptionAcknowledged	True/False	5	String	Optional	True | False
Visit Changes: This is a CONDITIONAL segment. If there are any updates to records, VisitExceptionAcknowledgments or manual entries, this segment must be sent.						
1	SequenceID	The Third Party EVV visit sequence ID to which the change applied	16	String	Yes	If TIMESTAMP is used: YYYYMMDDHHMMSS (Numbers only; no characters)
2	ChangeMadeBy	The unique identifier of the user, system or process that made the change. This could be a system identifier for the user or an email. Could also be a system process, in which case it should be identified.	64	String	Yes	LIVE DATA
3	ChangeDateTime	Date and time when change is made. At least to the second.	20	Date Time	Yes	FORMAT: YYYY-MM-DDTHH:MM:SSZ
4	GroupCode	This visit was part of a group visit. GroupCode is used to reassemble all members of the group.	6	String	Optional	LIVE DATA
5	ReasonCode	Reason Code associated with the change.	4	String	Yes	See Appendix 6 ReasonCode column
6	ChangeReasonMemo	Reason/Description of the change being made if entered. Note that this is a conditional field only required when a visit modification is made and where a reason note is required. If the reason note is required and one is not provided, this visit modification would be rejected.	256	String	Conditional	See Appendix 6 NoteRequired? Column

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
7	ResolutionCode	If the program is implemented to use resolution codes and a resolution code is required for each visit modification change, then this field is required in order for the visit modification record not to be rejected. Currently this is the only resolution code available for use.	4	String	Conditional	"A" = Written Documentation Maintained
— Visit Tasks: If you wish to match tasks from the original system to those allowed from the Task Appendix you can transfer those using this section. This is an OPTIONAL segment.						
1	TaskID	TaskID, this taskID must map to the Task IDs used for the agency in the Sandata system	4	String	Yes	See Appendix 4 Task ID column for specific values
2	TaskReading	Task reading	6	String	Optional	LIVE DATA
3	TaskRefused	True, False	5	String	Optional	True | False

Appendices

1 Payers & Programs

Payer ID	Program/Waiver Name	Program ID	Programs & Waivers Covered	Covered Services	Description
RI Medicaid	BHDDH	CDB		S5125, S5130, S5130L, T2017, T2017 U1U2, T1019	CDS Behavioral Health
RI Medicaid	PC	CDP		S5125, S5130, S5130L, T2017, T2017 U1U2, T1019	CDS Personal Choice
RI Medicaid	IP	CDI		S5125, S5130, S5130L, T2017, T2017 U1U2, T1019	CDS Independent Payer

2 Services & Modifiers

Payer	Program	HCPCS	Mod1	Mod2	Mod3	Mod4	Description
RI Medicaid	CDB	S5125					Attendant Care Service, High Acuity
RI Medicaid	CDP	S5125					Attendant Care Service, High Acuity
RI Medicaid	CDI	S5125					Attendant Care Service, High Acuity
RI Medicaid	CDB	S5130					Homemaker Services not otherwise stated
RI Medicaid	CDP	S5130					Homemaker Services not otherwise stated
RI Medicaid	CDI	S5130					Homemaker Services not otherwise stated

RI Medicaid	CDB	T2017	U1	U2			Habilitation
RI Medicaid	CDP	T2017	U1	U2			Habilitation
RI Medicaid	CDI	T2017	U1	U2			Habilitation
RI Medicaid	CDB	T2017	L9	U2			Habilitation per 15 mins. Lvl. 2
RI Medicaid	CDP	T2017	UD	U2	U8		Community-Based Supports by Professional staff
RI Medicaid	CDP	T2017	UN	UD	U2	U8	Community-Based Supports by Professional staff UN
RI Medicaid	CDB	T1019					Personal Care Services
RI Medicaid	CDP	T1019					Personal Care Services
RI Medicaid	CDI	T1019					Personal Care Services
RI Medicaid	CDB	S5130	TE				Community-Based Support
RI Medicaid	CDP	S5130	TE				Community-Based Support
RI Medicaid	CDI	S5130	TE				Community-Based Support

3 Languages

Language
English (US)
Spanish

4   Time Zones

Time Zone Code
US/Alaska
US/Aleutian
US/Arizona
US/Central
US/East-Indiana
US/Eastern
US/Hawaii
US/Indiana-Starke
US/Michigan
US/Mountain
US/Pacific
US/Samoa
America/Puerto_Rico
Canada/Atlantic
Canada/Central
Canada/East-Saskatchewan
Canada/Eastern
Canada/Mountain
Canada/Newfoundland
Canada/Pacific
Canada/Saskatchewan
Canada/Yukon

5   Exceptions

When visits are sent to Sandata via the Alt-EVV API, the Sandata system will calculate "exceptions" based on the incoming data. Business rules are applied to the visit based on the configuration details for a particular customer. These rules may trigger visits to be flagged with exceptions, denoting business rules that are not being met. Visits with exceptions may not be deemed "Approved" or "Verified", and thus may be excluded from additional processing, such as claims validation or data exports.

Users of the Alt-EVV API have the opportunity to "Acknowledge" the exceptions. This tells the Sandata system that the visit is complete despite the presence of exceptions. Thus, the visit can be treated as "Approved" or "Verified", so long as all calculated exceptions are marked as "Acknowledged".

Exception Code	Exception Name	Description
0	Unknown Clients	Exception for a visit that was performed for a client that is not yet entered or not found in the EVV system.
1	Unknown Employees	(Telephonic only) Exception for a visit that was performed by a caregiver who was not yet entered or not found in the EVV system (At the time the visit was recorded).
3	Visits Without In-Calls	Exception thrown when a visit is recorded without an "in" call that began the visit.
4	Visits Without Out Calls	Exception thrown when a visit is recorded without an "out" call that completed the visit.
23	Missing Service	Exception when the service provided during a visit is not recorded or present in the system.
28	Visit Verification Exception	Exception occurs when the program has the 'client verification of the visit' enabled, and is triggered when the client indicates that the DURATION of the EVV visit does not reflect the amount of time that care was actually provided for.
39	Client Signature Exception	Exception occurs when the program has the 'client verification of the visit' enabled, and is triggered when the visit does not have a signature or client voice recording captured at the time of service.
40	Service Verification Exception	Exception occurs when the program has the 'client verification of the visit' enabled, and is triggered when the client indicates that the SERVICE RECORDED in the EVV visit does not reflect the actual activity performed during that visit.

6 Tasks

Task ID	Description
0010	Medications-infusion
0011	Injection
0012	Catheter care

Task ID	Description
0013	Empty colostomy bag
0014	Skin Care/Protocol
0015	Monitor Skin Condition
0016	Apply hot application
0017	Therapeutic Support
0018	Tracheostomy care
0019	Wound care
0020	Assist Tube Feeding
0021	Assist with Ambulation/Mobility/Transfer
0022	Assist clean/dressing change
0023	Active Range Of Motion
0024	Apply cold application
0025	Urine test
0027	Oral Care
0028	Bathing
0031	Grooming
0032	Assist with Toileting
0034	Turning and Positioning
0035	Feeding
0036	Light housekeeping
0037	Meal Preparation
0038	Nail care
0039	Specimen Collection
0079	Make Bed
0085	Skin Care or Protocol with necrotic tissue
0086	Skin Care or Protocol infected and draining

Task ID	Description
0114	Toileting
0115	Incontinent Care
0116	Urinary drainage bag care
0117	Other Toileting / Elimination
0125	Patient refused Personal Care
0130	Passive and Active Range of Motion Exercises
0132	Bed rest maintained
0133	Assist with Ambulation
0136	Assist with Transfer
0139	Other Mobility
0140	Shave
0141	Hair Care
0143	Dress Complete / Assist / Partial Assist
0145	Bed bath
0146	Tub bath
0147	Shower
0148	Sponge
0149	Shampoo
0150	Other Personal Care
0153	O2 Precautions Followed
0163	Emergency Call Systems checked - Ensure plugged in and client wearing
0164	Vital sign: Temp
0165	Vital Sign: B/P
0166	Vital Sign: Pulse
0167	Vital Sign: Respiration
0168	Vital Sign: Weight

Task ID	Description
0186	Change Linens

7 Abbreviations

Abbreviation	Name
ANI	Automatic Number Identification
BYOD	Bring Your Own Device
CDS	Consumer Directed Services
EVV	Electronic Visit Verification
FI	Fiscal Intermediary
GPS	Global Positioning System
IVR	Interactive Voice Response – the underlying system used for telephony
MVV	Mobile Visit Verification
PA	Prior Authorization
PIN	Personal Identity Number
SMC	Sandata Mobile Connect
SSN	Social Security Number
TVV	Telephonic Visit Verification

8   Terminology

Sandata Terminology	Other Possible References
Agency	Agency Provider Provider Account Billing Agency
Authorization	Service Plan Prior Auth
Client	Individual Patient Member Recipient Beneficiary
Contract	Program Program Code
Employee	Caregiver Admin Home Health Aide Consumer Directed Worker Staff Worker Individual Provider Scheduler
HCPCS	Bill Code Procedure Code Service Code
Payer	Admission Insurance Company Contract Managed Care Organization (MCO) State
Provider	Agency Third Party Administrator (TPA)

9   Technical Companion and Examples

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

API Location
The RESTful APIs can be reached at the following locations:

Production:
https://api.sandata.com/interfaces/intake/clients/rest/api/v1.1
https://api.sandata.com/interfaces/intake/employees/rest/api/v1.1
https://api.sandata.com/interfaces/intake/visits/rest/api/v1.1

UAT:
https://uat-api.sandata.com/interfaces/intake/clients/rest/api/v1.1
https://uat-api.sandata.com/interfaces/intake/employees/rest/api/v1.1
https://uat-api.sandata.com/interfaces/intake/visits/rest/api/v1.1

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

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. The credentials provided are specific to an account, and all data sent must also correspond to that account, or the request will be rejected. An example of this header would be:
Account: 12345

Alternatively, for MCO customers and other vendors sending data on behalf of multiple EVV accounts, the "EntityGuid" header is used. This ID will be provided by Sandata during implementation.An example of this header would be:
EntityGuid: 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:
For each element being sent (Client, Employee, Visit), the data for must be received successfully and fully processed before the next type of data can be sent. i.e.

     Step 1 – Send a POST request with the data to the API
     Step 2 – Utilize the "Status" API to check that processing completed successfully
     Step 3 – Send the next type of data

If the call for Status check results in a messageSummary of "The result for the input UUID is not ready yet. Please try again.", then the sender process must "sleep" and recheck Status until the Status API call returns a messageSummary of either "All records updated successfully." Or "Records uploaded, please check errors/warnings and try again."

It's important to note that the processing of a previously sent type of data MUST complete prior submitting the API call for the next type of data.
Clients and Employees should be sent prior to sending visits. This is necessary in order to ensure that client/employee data exists in the Sandata system when a visit is received, in order to avoid errors on visit processing due to missing client and/or employee data.

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/v1.1/status?uuid=8d7c31f7-4a09-41a9-8edd-f9819def58f1
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 determining if processing was completed and successful.

An example workflow when sending employees, clients, and visits would be:
1. Send POST request with employee data; receive UUID.
2. Utilize UUID to query employee "Status" API; if still processing, sleep and recheck.
3. Once "Status" API for employees indicates processing is finished, send POST request with client data; receive UUID.
4. Utilize UUID to query client "Status" API; if still processing, sleep and recheck.
5. Once "Status" API for client indicates processing is finished, send POST request with visit data; receive UUID.
6. Utilize UUID to query visit "Status" API; if still processing, sleep and recheck.
7. Once "Status" API for visits indicates processing is finished, all data has been transmitted.

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 Employee

```
[{
"ProviderIdentification": { "ProviderQualifier": "SandataID", "ProviderID": "123456"
},
"EmployeeQualifier": "EmployeeSSN", "EmployeeIdentifier": "999999999",
"EmployeeOtherID": "2222",
"SequenceID": 99811930002,
"EmployeeSSN": "999999999",
"EmployeeLastName": "Employee", "EmployeeFirstName": "Test", "EmployeeEmail": "dummy@sandata.com", "EmployeeManagerEmail": "dummymanager@sandata.com", "EmployeeAPI": "111111111",
"EmployeePosition": "RN"
}]
```

JSON Client

[{
"ProviderIdentification": { "ProviderQualifier": "SandataID", "ProviderID": "123456"
},
"ClientID": "96641",
"ClientFirstName": "Test", "ClientMiddleInitial": "T", "ClientLastName": "Client", "C
"ClientMedicaidID": "999999999",
"ClientIdentifier": "999999999", "MissingMedicaidID": "False", "SequenceID": 99811930002,
"ClientCustomID": "111111111",
"ClientOtherID": "2222",
"ClientSSN": "999999999",
"ClientTimezone": "US/Eastern", "Coordinator": "123", "ClientPayerInformation": [{
"PayerID": "57",
"PayerProgram": "123",
"ProcedureCode": "123",
"ClientPayerID": "987654321",
"ClientEligibilityDateBegin": "2019-01-01",
"ClientEligibilityDateEnd": "2020-01-01",
"ClientStatus": "02",
"EffectiveStartDate": "2019-01-01",
"EffectiveEndDate": "2020-01-01"
}],
"ClientAddress": [{
"ClientAddressType": "Home", "ClientAddressIsPrimary": true, "ClientAddressLine1": "36 West 5th Street",
"ClientAddressLine2": "10th Floor", "ClientCounty": "Kings", "ClientCity": "Manhattan", "ClientState": "NY",
"ClientZip": "10017",
"ClientAddressLongitude": -73.4228741,
"ClientAddressLatitude": 40.7431032
}],
"ClientPhone": [{
"ClientPhoneType": "Home", "ClientPhone": "1234567890"
}],
"ClientDesignee": [{
"ClientDesigneeFirstName": "", "ClientDesigneeLastName": "", "ClientDesigneeEmail": "", "ClientDesigneeStatus": "",
"ClientDesigneeStartDate": "", "ClientDesigneeEndDate": "", "ClientDesigneeRelationship": ""
}]

"ClientResponsibleParty": [{ "ClientContactType": "Other", "ClientContactFirstName": "Test",
"ClientContactLastName": "Respparty", "ClientContactPhoneType": "Mobile", "ClientContactPhone": "3478788467",
"ClientContactEmailAddress": "dummy@sandata.com", "ClientContactAddressLine1": "2727 East 29th Street", "ClientContactAddressLine2":
"Apt 8I", "ClientContactCity": "Brooklyn", "ClientContactState": "NY",
"ClientContactZip": "11229"
}]
}]

JSON Visit

[{
"ProviderIdentification": { "ProviderID": "123456", "ProviderQualifier": "SandataID"
},
"VisitOtherID": "123456789",
"SequenceID": 111, "EmployeeQualifier": "EmployeeSSN", "EmployeeOtherID": "999999999",
"EmployeeIdentifier": "999999999", "GroupCode": null,
"ClientIDQualifier": "ClientMedicaidID", "ClientID": "111111111",
"ClientOtherID": "111111111", "VisitCancelledIndicator": false, "PayerID": "999",
"PayerProgram": "PRG", "ProcedureCode": "T1000", "Modifier1": null, "Modifier2": null, "Modifier3": null, "Modifier4": null, "VisitTimeZone":
"US/Eastern",
"ScheduleStartTime": "2019-07-28T16:02:26Z", "ScheduleEndTime": "2019-07-28T20:02:26Z", "AdjInDateTime": "2019-07-28T15:02:26Z",
"AdjOutDateTime": "2019-07-28T19:02:26Z",
"BillVisit": true, "HoursToBill": 10,
"HoursToPay": 10,
"Memo": "This is a memo!", "ClientVerifiedTimes": true, "ClientVerifiedTasks": true, "ClientVerifiedService": true, "ClientSignatureAvailable":
true,
"ClientVoiceRecording": true, "Calls": [{
"CallExternalID": "123456789", "CallDateTime": "2019-07-28T16:02:26Z",
"CallAssignment": "Time In", "GroupCode": null, "CallType": "Other", "ProcedureCode": "T1000",
"ClientIdentifierOnCall": "111111111", "MobileLogin": null,
"CallLatitude": 40.34455,
"CallLongitude": -21.99383,
"Location": "123",
"TelephonyPIN": 999999999,
"OriginatingPhoneNumber": "9997779999"
}],

```
"VisitExceptionAcknowledgement": [{ "ExceptionID": "15", "ExceptionAcknowledged": false
}],
"VisitChanges": [{
"SequenceID": "110",
"ChangeMadeBy": "dummy@sandata.com", "ChangeDateTime": "2019-07-25T18:45:00Z",
"GroupCode": null, "ReasonCode": "7227",
"ChangeReasonMemo": "Change Reason Memo 999", "ResolutionCode": "A"
}],
"VisitTasks": [{
"TaskID": "321",
"TaskReading": "98.6", "TaskRefused": false
}]
}]
```

Sample Responses

See some sample responses below. Note that the samples are provided for employee, but the same pattern is followed for both client and visit.
Employee POST (Successful)

```
{
"id": "7f6dcd1a-ec5e-4efd-a2d4-1049756016a5", "status": "SUCCESS",
"messageSummary": "The result for the input UUID is not ready yet. Please try again.", "data": {
"uuid": "7f6dcd1a-ec5e-4efd-a2d4-1049756016a5", "account": "12345",
"message": "The result for the input UUID is not ready yet. Please try again.",
"reason": "Transaction Received."
}
}
```

Employee POST (Validation Error)

```
{
"id": "ea76e9a1-9b29-4f3d-af1c-6b573eb29b76", "status": "FAILED",
"messageSummary": "[1] Records uploaded, please check errors/warnings and try again.", "data": [
{
"ProviderIdentification": { "ProviderID": "123456", "ProviderQualifier": "SandataID", "ErrorCode": null, "ErrorMessage": null
},
"EmployeeIdentifier": "999999999",
```

"EmployeeOtherID": "2222",
"SequenceID": 99811930002,
"EmployeeQualifier": "EmployeeSSN", "EmployeeSSN": "999999999",
"EmployeeLastName": "Employee", "EmployeeFirstName": "Test", "EmployeeEmail": "dummy@sandata.com", "EmployeeManagerEmail":
"dummymanager@sandata.com", "EmployeeAPI": "111111111",
"EmployeePosition": "AKN", "ErrorCode": null,
"ErrorMessage": "ERROR: The EmployeePosition expected format is not correct. The record should satisfy this regular expression
['HHA|HCA|RN|LPN|PCA']. Invalid Value='AKN'. The record is being rejected."
}
]
}

Employee GET (Status)

A sample response to a status GET request that has finished processing is:
{
"id": "73b7a9d7-a79a-45cc-9def-cb789c111f4b", "status": "SUCCESS",
"messageSummary": "All records updated successfully.", "data": {
"uuid": "73b7a9d7-a79a-45cc-9def-cb789c111f4b", "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": "873a1d97-0681-402e-8268-b6cad8f2b4b7",
"status": "SUCCESS",
"messageSummary": "The result for the input UUID is not ready yet. Please try again.", "data": {
"uuid": "873a1d97-0681-402e-8268-b6cad8f2b4b7", "account": "12345",
"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": "e5de964b-9803-4051-b89b-8a89926e4983",
"status": "SUCCESS",

"messageSummary": "[2] Records uploaded, please check errors/warnings and try again.", "data": [
{
"ProviderIdentification": { "ProviderID": "123456", "ProviderQualifier": "SandataID", "ErrorCode": null, "ErrorMessage": null
},
"EmployeeIdentifier": "999999999",
"EmployeeOtherID": "2222",
"SequenceID": 99811930002,
"EmployeeQualifier": "EmployeeSSN", "EmployeeSSN": "999999999",
"EmployeeLastName": "Employee", "EmployeeFirstName": "Test", "EmployeeEmail": "dummy@sandata.com", "EmployeeManagerEmail":
"dummymanager@sandata.com", "EmployeeAPI": "111111111",
"EmployeePosition": "RN", "ErrorCode": "-709",
"ErrorMessage": "Version number is duplicated or older than current"
}
]
}