



Santrax Electronic Visit Verification and Sandata Electronic Visit Verification 8.1.10

Release Date: Thursday, February 7, 2019

UNIVERSAL RELEASE NOTES

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

Valued Provider:

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

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

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

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VISIT MAINTENANCE

1. NEW CLIENT PAYER ID FIELD.

Added a new field, **Client Payer ID**, to the *Create Client* and *Edit Client* screens. The new field stores an alternate Medicaid ID, if applicable. If a **Client Payer ID** is entered, the Medicaid ID is optional. When a client has both a **Medicaid ID** and **Client Payer ID** entered, the **Medicaid ID** is used for validation.

Prerequisite: Sandata EVV Version 8

2. NEW FILTERS IN VISIT MAINTENANCE.

Added new **Program** and **Service** fields/columns to the *Visit Maintenance* screens. These drop-downs are limited based on the on the payer, program and/or service selected. The filter/column is enabled or disabled under **Show/Hide Additional Filter Options** and **Show/Hide Display Options**. The following rules also apply:

- The **Program** drop-down options limit based on the **Payer** selected.
- The **Service** drop-down options limit based on the **Program** selected.
- If the user does not select the **Payer**, **Program** or **Service** filters before selecting the exception the system populates the **Exception Types** drop-down using the Agency Level Master Exception List.
- If the user selects the **Payer**, **Program** or **Service** filters first before the exception the system populates the **Exception Types** drop-down using the Service Level Master Exception List.
- If the user selects the **Payer** but not the **Service** before selecting the exception(s), the **Exception Types** field populates using the Service Level Master Exception List.

Prerequisite: Sandata EVV Version 8

3. CHANGE IN VISIT STATUS CALCULATIONS.

The status of a visit is now calculated based on the following rules:

- If a visit is assigned a payer, program and service, the visit status is calculated using payer exceptions.
- If a visit does not have a payer, program and service assigned, the visit status is calculated using account exceptions.

Prerequisite: Sandata EVV Version 8

4. UPDATED NAP PRIVILEGES.

Updated the Non-Agency Providers (NAP) user role to include the 'Visit-Update Employee' privilege. The new privilege allows NAPs to resolve the 'Unknown Employee' exceptions using the *Employee* section of the *Visit Details* screen.

Prerequisite: Sandata EVV Version 8

REPORTS & EXPORTS

5. CHANGES TO THE TIME SHEET REPORT.

Modified the *Time Sheet* report to:

- Exclude any extra blank pages
- Include the signature and **Final Adjusted Hours** at the end of each client and employee combination
- Include **Adjusted Total Hours** for each page

Prerequisite: Sandata EVV Version 8

6. CHANGES TO ACTIVE CLIENTS REPORT.

Modifications were made to the *Active Clients* report. The following changes were made:

- Added new client Medicaid ID logic:
 - o Show client Medicaid ID if available.
 - o When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - o If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- Changed the following heading labels :
 - o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
 - o **CUSTOM ID** is renamed **CLIENT ALTERNATE ID**.
- Removed **ADDR VAL** column.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

7. CHANGES TO ACTIVE EMPLOYEES REPORT.

Modifications were made to the *Active Employees* report. The following changes were made:

- Changed the following heading labels :
 - o **EMAIL** is renamed **EMPLOYEE EMAIL**
 - o **SANTRAX ID** is renamed **EMPLOYEE SANTRAX ID**
 - o **PHONE** is renamed **PHONE #**
 - o **SV** is renamed **SV ENROLLED?**
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

8. CHANGES TO VISIT VERIFICATION REPORT.

Modifications were made to the *Visit Verification* report. The following changes were made:

- Column headers are now capitalized.
- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display using hh:mm format.
- Added new client Medicaid ID logic:
 - o Show client Medicaid ID if available.

- o When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there will be no Medicaid ID.
- o If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
- o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- Changed the following heading labels :
 - o **CLIENT** is renamed **CLIENT NAME**.
 - o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
 - o **EMPLOYEE** is renamed **EMPLOYEE NAME**.
- Added a new PHONE # field which displays the source phone number, if applicable.
 - o If the client is known, the full phone number displays.
 - o If the client is unknown, only the last 4 digits of the phone number display. The first six digits display as asterisks.
- Added a new column, **EMPLOYEE SANTRAX ID**
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

9. CHANGES TO VISIT LOG REPORT.

Modifications were made to the *Visit Log* report. The following changes were made:

- Column headers are now capitalized.
- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - Show client Medicaid ID if available.
 - When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- If the client is unknown, the source phone number no longer displays in **CLIENT NAME** column.
- Changed the following heading labels :
 - **CALL / IN** is renamed **CALL / START**.
 - **CALL / OUT** is renamed **CALL / END**.
- **Added a new PHONE # field which displays the source phone number, if applicable.**
 - If the client is known, the full phone number displays.
 - If the client is unknown, only the last 4 digits of the phone number will display. The first six digits display as asterisks.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

10. CHANGES TO VISIT LISTING REPORT.

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

- The report no longer includes visits where both the client and employee are unknown.
- When Social Security Numbers are displayed, masking rules apply based on account rules and privileges for the providers. For Aggregator, the full SSN displays. On reports, the last five digits display.
- Added new client Medicaid ID logic:
 - Show client Medicaid ID if available.
 - When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there will be no Medicaid ID.
 - If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- Changed the following heading labels:
 - **CALL / IN** is renamed **CALL / START**.

- o **CALL / OUT** is renamed **CALL / END**.
- Added new columns:
 - o **PAYER**
 - o **GROUP VISIT CODE**
 - o **EMPLOYEE SANTRAX ID**
- If the client is unknown the **CLIENT NAME** column is left blank.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

11. **CHANGES TO VISIT VERIFICATION ACTIVITY SUMMARY REPORT.**

Modifications were made to the *Visit Verification Activity Summary* report. The following changes were made:

- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - o Show client Medicaid ID if available.
 - o When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there will be no Medicaid ID.
 - o If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- Changed the following heading labels :
 - o **CLIENT** is renamed **CLIENT NAME**.
 - o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
 - o **EMPLOYEE** is renamed **EMPLOYEE NAME**.
- Added new columns:
 - o **GROUP VISIT CODE**
 - o **EMPLOYEE SANTRAX ID**
- If the employee is unknown the **EMPLOYEE NAME** field is left blank.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

12. **12. CHANGES TO SUMMARY VISIT STATUS REPORT.**

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

- Column headers are now capitalized.
- The report no longer includes visits where both the client and employee are unknown.

Prerequisite: Sandata EVV Version 8

13. **CHANGES TO VISIT CLAIMS VERIFICATION STATUS REPORT**

Modifications were made to the *Visit Claims Verification Status* report. The following changes were made:

- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - Show client Medicaid ID if available.
 - When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- Changed the following heading labels :
 - **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
 - **VISIT STATUS** is renamed **STATUS**.
- Added a new column, **GROUP VISIT CODE**.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).
- If the Client is unknown, the source phone number no longer displays in **CLIENT NAME** field.

Prerequisite: Sandata EVV Version 8

14. CHANGES TO DETAIL VISIT STATUS REPORT.

Modifications were made to the *Detail Visit Status* report. The following changes were made:

- Column headers are now capitalized.
- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - Show client Medicaid ID if available.
 - When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- If the client is unknown, the source phone number no longer displays in **CLIENT NAME** column.
- Phone Numbers column changes:
 - If the client is known, the full phone number displays.
 - If the client is unknown, only the last 4 digits of the phone number will display. The first six digits display as asterisks.
- Changed the following heading labels:

- o **CLIENT** is renamed **CLIENT NAME**.
- o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
- o **EMPLOYEE** is renamed **EMPLOYEE NAME**.
- o **EXCEPTIONS** is renamed **UNRESOLVED EXCEPTIONS**.
- o **CALL/ IN** is renamed **CALL /START**.
- o **CALL / OUT** is renamed **CALL / END**.
- o **ADJUSTED / IN** is renamed **ADJUSTED / START**.
- o **ADJUSTED /OUT** is renamed **ADJUSTED / END**.
- Added a new field, **GROUP VISIT CODE**.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: None

15. CHANGES TO CLIENT VISIT SUMMARY REPORT.

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

- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - o Show client Medicaid ID if available.
 - o When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - o If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- If the client is unknown, the source phone number no longer displays in **CLIENT NAME** column.
- Changed the following heading labels :
 - o **SANTRAX ID** is renamed **EMPLOYEE SANTRAX ID**.
 - o **EMAIL** is renamed **EMPLOYEE EMAIL**.
 - o **EMPLOYEE** is renamed **EMPLOYEE NAME**.
 - o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
- Removed the **VISIT START** and **VISIT END** fields.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

16. CHANGES TO GPS DISTANCE EXCEPTION REPORT.

Modifications were made to the *GPS Distance Exception Report*. The following changes were made:

- Column headers are now capitalized.
- The report no longer includes visits where both the client and employee are unknown
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - o Show client Medicaid ID if available
 - o When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - o If the client **Medicaid ID** field is blank and the newborn indicator is deselected, the **CLIENT MEDICAID ID** column in the report output displays the client payer ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- If the Client is unknown, the source phone number no longer displays in **CLIENT NAME** column
- Changed the following heading labels :
 - o **USERNAME** is renamed **EMPLOYEE EMAIL**.
 - o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.
 - o **CLOSEST CLIENT LOCATION** is renamed **CLOSEST CLIENT ADDRESS**.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

17. CHANGES TO VISIT VERIFICATION EXCEPTION REPORT.

Modifications were made to the *Visit Verification Exception Report*. The following changes were made:

- Column headers are now capitalized.
- The report no longer includes visits where both the client and employee are unknown.
- Any columns that display hours display in hh:mm format.
- Added new client Medicaid ID logic:
 - o Show client Medicaid ID if available.
 - o When a client is marked as a newborn, the **CLIENT MEDICAID ID** column displays 'N' since there is no Medicaid ID.
 - o If a client's profile has values in both the **Medicaid ID** and the **Alternate Medicaid ID** fields, the report displays them together in the same column. The alternate Medicaid ID displays in its own column when the report is exported to .CSV .
- If the client is unknown, the source phone number no longer displays in **CLIENT NAME** column.
- Added a new column, **PHONE NUMBER**.
 - o If the client is known, the full phone number displays.
 - o If the client is unknown, only the last 4 digits of the phone display. The first six digits display as asterisks.
- Changed the following heading labels :
 - o **CLIENT** is renamed **CLIENT NAME**.
 - o **MEDICAID ID** is renamed **CLIENT MEDICAID ID**.

- o **EMPLOYEE** is renamed **EMPLOYEE NAME**.
- Added a new column, **GROUP VISIT CODE**.
- When exported to .CSV the **CLIENT NAME** column displays as separate columns (Example: first name, last name and middle initial).

Prerequisite: Sandata EVV Version 8

GLOBAL

18. DATA WAREHOUSE EXPORT UPDATES.

Updated the OH ODM export to include all Phase 2 specification changes.

NOTE: This functionality will be enabled when approved by OH ODM.

Prerequisite: Ohio ODM Payer, Sandata EVV Version 8

19. MODIFIED USER ACCESS.

Modifications were made to allow a user to be both a designee and an employee when received via the OpenEVV interface. When logging in, users with multiple roles are prompted to select the applicable portal.

Prerequisite: CDS, OpenEVV, Sandata EVV Version 8