



RIEOHHS CDS Open EVV – EVV Addendum v1.1

Addendum to OpenEVV - EVV System Specification v7.10

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v1.1	Pamela Brooks	2.2	Updated expected value for ClientID (Index 2)	04.28.2020

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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

- 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.

2.1 Account Identification

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.

2.2 Client

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

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
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	Value for ClientMedicaidID 10 digits
3	ClientLastName	Client's Last Name.	30	String	Yes	LIVE DATA
4	ClientFirstName	Client's First Name.	30	String	Yes	LIVE DATA
5	ClientMiddleName	Client's Middle Initial. May be required if needed for billing. Note that some systems may onl use the first letter as the initial.	30	String	Conditional	LIVE DATA
6	MissingMedicaidID	Indicator that a patient is a newborn. If this value is provided, ClientMedicaidID will be ignored and will be valid as null. Values true/false.	5	String	Optional	True False
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	Conditional	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
8	ClientSuffix	Client Suffix (e.g. Sr. Jr. III, IV, V (no special characters)).	4	String	Optional	LIVE DATA
9	ClientSSN	Client's social security number. If the field is left empty, RecipientIDCustom2 must be populated. Not required if RecipientIDCustom2 is sent. Numbers only, no dashes and leading zeros must be included.	9	String	N/A	DO NOT PROVIDE
Client Identifiers						
10	ClientMedicaidID	Unique ID provided by the State Medicaid program to the client.	64	String	Yes	FORMAT 10 digits
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	Optional	DO NOT PROVIDE
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	Conditional	DO NOT PROVIDE
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	Optional	LIVE DATA
14	ClientCaseManagerEmail	Payer Level Case Managers are individuals who coordinate all aspects of the care of individual patients. If the case manager will be logging onto the EVV system, please provide the email address in this field.	64	String	Optional	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.
15	Coordinator	The staff member assigned to the client in a specific agency as the coordinator for an employee.	64	String	Optional	LIVE DATA
16	ClientMedicalRecordNumber	The medical record number assigned to the client.	12	String	Optional	DO NOT PROVIDE
17	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	Optional	DO NOT PROVIDE
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	Optional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
Client Demographics						
18	ClientGender	Client's gender. Values: O = Unknown or other; M = Male, F = Female	1	String	Optional	O M F
19	ClientBirthDate	Client's date of birth. Required for billing.	10	Date	Optional	FORMAT: YYYY-MM-DD
20	ClientMaritalStatus	Client's marital status. Values: M = Married, S = Single, W = Widowed, O = Other	1	String	Optional	M S W O
21	ClientLanguage	Client's language. The list of acceptable values will be determined during implementation.	32	String	Optional	See Appendix 3 LanguageID column
22	DischargeDate	Date that the client was last discharged from the hospital.	10	Date	Optional	FORMAT: YYYY-MM-DD
23	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 4
24	ClientPriority	Allows designation of a client's priority. Generally used to designate clients whose service is critical.	2	String	Optional	DO NOT PROVIDE
25	Team	Team, if applicable.	4	String	Optional	DO NOT PROVIDE
26	Branch	Used to identify a branch location within a given agency.	2	String	Optional	DO NOT PROVIDE
27	Borough	Primarily used for New York City agencies.	1	String	Optional	DO NOT PROVIDE
28	Area	Area code for the client. NOTE this is not area code related to a phone number.	2	String	Optional	DO NOT PROVIDE
Client Billing & Payer Information DO NOT PROVIDE						
29	ClientAdTypeID	User defined ID representing ID for Admission Type / payer.	6	String	Optional	DO NOT PROVIDE
30	ClientPrimaryDiagnosisCode	The client's primary diagnosis code in ICD-10 format.	10	String	Optional	DO NOT PROVIDE
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	Optional	DO NOT PROVIDE
32	CaseNumber	Case number sent as part of the schedule record. Special use.	9	String	Optional	DO NOT PROVIDE
33	CaseSequence	Case sequence. Special use.	4	String	Optional	DO NOT PROVIDE
34	MobileDevice	Value in this field determines if the client requires a mobile device to be supplied by the payer/program. Special use only.	1	String	Optional	DO NOT PROVIDE
35	Status	Status of a client. To delete a record, set to D or leave empty for an insert or update.	1	String	Optional	DO NOT PROVIDE

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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 be acceptable for Billing and PO Box will not function correctly for MVV.	30	String	Yes	LIVE DATA
37	ClientAddressLine2	Street address line 2 associated with this address.	30	String	Optional	LIVE DATA
38	ClientCity	City associated with this address.	30	String	Yes	LIVE DATA
39	ClientState	State associated with this address. Two Character standard abbreviation.	2	String	Yes	Format: 2 char standard state abbreviation
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.	10	String	Yes	Format: ##### Rules: This is the full nine digits of the zip code for a business mailing zip code. If the +4 cannot be provided, please send '0000'.
41	ClientAddressType	Values: Home, Business, Other. Note that multiple of the same type can be provided. Default to Other if not available.	12	String	Yes	Home Business Other

2.2.1 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	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	PayerID	Sandata EVV assigned ID for the payer.	64	String	Yes	See Appendix 1 PayerID column
2	PayerProgram	If applicable, the program to which this visit belongs.	9	String	Yes	See Appendix 1 ProgramID column
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	See Appendix 2 HCPCS column
4	ClientPayerID	Unique identifier sent by the payer.	20	String	Optional	LIVE DATA
5	ClientEligibilityDateBegin	Client eligibility begin date. This field is optional if ClientStatus is sent. Format YYYY-MM-DD	10	Date	Conditional	FORMAT: YYYY-MM-DD
6	ClientEligibilityDateEnd	Client eligibility end date. This field is optional if ClientStatus is sent. Format YYYY-MM-DD	10	Date	Conditional	FORMAT: YYYY-MM-DD
7	EffectiveStartDate	The effective start date for the client payer information.	10	Date	Optional	FORMAT: YYYY-MM-DD

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
8	EffectiveEndDate	The effective end date for the client payer information.	10	Date	Optional	FORMAT: YYYY-MM-DD
9	ClientStatus	The client's current status. Provide the 2 digit code including the 0. Available values: 02 = Active, 04 = Inactive	2	String	Conditional	02 04

2.2.2 PhoneNbr

This 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 child/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	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
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	SANDATA ASSIGNED
3	ClientPhoneType	Values: Home, Mobile, Business and Other. Note that multiple of the same type can be provided. Default to Other if not available.	12	String	Optional	Home Mobile Business Other
4	ClientPhone	Client phone number.	10	String	Required	FORMAT: #####

2.2.3 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	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
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	SANDATA ASSIGNED
3	AddressType	Values: Home, Business, Other. Note that multiple of the same type can be provided. Default to Other if not available.	50	String	Yes	Home Business Other
4	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
5	ClientAddressLine2	Street address line 2 associated with this address.	30	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.	10	String	Yes	Format: ##### Rules: This is the full nine digits of the zip code for a business mailing zip code. If the +4 cannot be provided, please send '0000'.

2.2.4 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	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
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	SANDATA ASSIGNED
3	ContactLastName	Client Contact Last Name. Entered by provider agency.	30	String	Optional	LIVE DATA
4	ContactFirstName	Client Contact First Name. Entered by provider agency.	30	String	Optional	LIVE DATA
5	ContactRelationshipToClient	Emergency Contact's relationship with the Client. The list of acceptable values will be determined during implementation.	20	String	Optional	Values to be determined during implementation.
6	ClientContactPhoneType	Client Contact's Phone Type. Values: Business, Home, Mobile, Other.	12	String	Optional	Business Home Mobile Other
7	ContactPhoneNumber	Client Contact Home Phone Number. Entered by provider agency. Format #####.	10	String	Yes	FORMAT: #####
8	ContactAddressLine1	Client Contact's Street Address, Line 1.	30	String	Optional	LIVE DATA
9	ContactAddressLine2	Client Contact's Street Address, Line 2.	30	String	Optional	LIVE DATA
10	ContactCity	Client Contact's City.	30	String	Optional	LIVE DATA
11	ContactState	Client Contact's State. Two Character standard abbreviation.	2	String	Optional	Format: 2 char standard state abbreviation
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	Optional	Format: ##### Rules: This is the full nine digits of the zip code for a business mailing zip code. If the +4 cannot be provided, please send '0000'.

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
13	ContactEmail	Client Contact's email address.	64	String	Optional	Format: xxx@xxx.xxx Validation Rules: @ and extension (.xxx) are required to validate an address.

2.3 Employee

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

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
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.	9	String	Yes	SANDATA ASSIGNED
3	EmployeeLastName	Employee's Last Name	30	String	Yes	LIVE DATA
4	EmployeeFirstName	Employee's First Name	30	String	Yes	LIVE DATA
5	EmployeeMiddleInitial	Employee's Middle Initial	1	String		LIVE DATA
6	Department	Employee's department. The values for this field will be defined during implementation.	3	String	Optional	LIVE DATA
7	EmployeeAPI	Employee client's alternate provider identifier or Medicaid ID	25	String	Optional	DO NOT PROVIDE
8	EmployeeType	Such as nurse or home health attendant. This is user defined and varies based on the source system.	1	String	Optional	LIVE DATA
9	Discipline	Category of service. The values for this field will be defined during implementation.	17	String	Optional	LIVE DATA
10	EmployeeEmailAddress	Employee's Email Address. This value is required if the employee is to have access to the Sandata mobile application (SMD) or to the Sandata EVV	50	String	Conditional	Format: xxx@xxx.xxx

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
		Employee Portal. This value must be unique, as it would be used as a username for the system.				Validation Rules: @ and extension (.xxx) are required to validate an address.
11	EmployeeAddress1	Street Address Line 1 associated with this address.	30	String	Optional	LIVE DATA
12	EmployeeAddress2	Street address line 2 associated with this address.	30	String	Optional	LIVE DATA
13	EmployeeCity	City associated with this address.	30	String	Optional	LIVE DATA
14	EmployeeState	State associated with this address. Two Character standard abbreviation.	2	String	Optional	Format: 2 char standard state abbreviation
15	EmployeeZipCode	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros.	10	String	Optional	Format: ##### Rules: This is the full nine digits of the zip code for a business mailing zip code. If the +4 cannot be provided, please send '0000'.
16	EmployeePhone	Employee's phone number	10	String	Optional	FORMAT: #####
17	EmployeeAltPhone	Employee's alternate phone number	10	String	Optional	FORMAT: #####
18	EmployeeAltPhone2	Employee's second alternate phone number	10	String	Optional	FORMAT: #####
19	EmployeeID	Unique identifier for the employee in the source system	10	String	Optional	Employee FULL SSN
20	EmployeeIDCustom1	Customized employee ID	64	String	Optional	DO NOT PROVIDE
21	EmployeeIDCustom2	Customized employee ID	64	String	Optional	DO NOT PROVIDE
22	EmployeeSocialSecurity	Employee's social security number.	9	String	Optional	FORMAT: ##### REQUIRED FOR CT DDS PROGRAM
23	PayRate	Rate for payroll.	5	Decimal	Optional	FORMAT: Can have values like 5.043 or 1.23 and should not exceed 5 characters. Decimal point is included in the length
24	EmployeeHireDate	Employee's date of hire. If more than 1, provide latest hire date.	10	Date	Optional	FORMAT: YYYY-MM-DD
25	EmployeeEndDate	Employee's HR recorded end date.	10	Date	Optional	FORMAT: YYYY-MM-DD
26	EmployeeBirthDate	Employee's date of birth.	10	Date	Optional	FORMAT: YYYY-MM-DD
27	EmployeeGender	Employee's gender. Values: O = Unknown or other, M = Male, F = Female	1	String	Optional	O M F
28	EmployeePrimaryLocation	The employee's primary location.	15	String	Optional	
29	Status	Status of an employee. To delete a record, set to D or leave empty for an insert or update.	1	String	Optional	NULL D

2.4 Schedule NOT IN SCOPE FOR THIS PROGRAM (TABLE REMOVED)

2.5 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	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
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	Optional	"ClientMedicaidID"
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	Value for ClientMedicaidID
4	EmployeeQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String	Optional	EmployeeSSN
5	EmployeeID	Unique identifier for the employee in the source system.	10	String	Optional	FORMAT: ##### (Employee FULL SSN)
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	SANDATA ASSIGNED

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	02 04
8	Service	Service description.	12	String	Yes	LIVE DATA
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	FORMAT: YYYY-MM-DD
10	XRefEndDate	Date when the relationship ended. If this value is not provided, it will be assumed to be ongoing.		Date	Optional	FORMAT: YYYY-MM-DD

3 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.

3.1 Basic Description

- An API call is made requesting complete 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.

3.2 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	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
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	FORMAT: numeric; it should be padded with leading zeros to a minimum 4 char (e.g. 0998). 10 char maximum.
2	ScheduleID	Unique Identifier for the schedule record from the source system.	40	String	Optional	NOT IN SCOPE
3	ClientID	The client id is the unique identifier for the patient / client / individual.	10	String	Optional	SANDATA ASSIGNED
4	ClientMedicaidId	Unique ID provided by the State Medicaid program to the client.	64	String	Optional	LIVE DATA
5	EmployeePIN	Unique identifier used by the employee when calling into the Santrax EVV system.	9	String	Optional	SANDATA ASSIGNED

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
6	ActivityDate	Actual start date is the date in UTC format. Time set to 0.		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
7	ActivityEndDate	Actual end date is the date in UTC format. Time set to 0.		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
8	ScheduleStartTime	Activity / Schedule start date and time.		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
9	ScheduleEndTime	Activity / Schedule end date and time.		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
10	ScheduledDuration	Scheduled duration in minutes. Format HH:MM	5	String	Optional	FORMAT: HH:MM
11	StartTime	Actual visit start time. Format HH:MM	5	String	Optional	FORMAT: HH:MM
12	EndTime	Actual visit end time. Format HH:MM	5	String	Optional	FORMAT: HH:MM
13	PayMinutes	Pay hours in minutes based on the value entered in Sandata EVV Visit Maintenance.		Decimal	Optional	
14	Units	Calculated units based on rules for the specified payer.	999	String	Optional	
15	StartType	The type of information used to define the start time. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER	10	String	Optional	IVR FVV MVV MANUAL NONSTX OTHER
16	EndType	The type of information used to define the start time. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER	10	String	Optional	IVR FVV MVV MANUAL NONSTX OTHER
17	StartPhoneNumber	If an IVR call, the phone number from which the phone call was received.	10	String	Optional	FORMAT: #####
18	EndPhoneNumber	If an IVR call, the phone number from which the phone call was received.	10	String	Optional	FORMAT: #####
19	Miles	Visit travel miles if Mileage Tracking is used.	9999.9999	Decimal	Optional	FORMAT: Decimal
20	ErrandMiles	Visit errand miles if this feature is enabled.	9999.9999	Decimal	Optional	FORMAT: Decimal
21	TravelTime	Visit travel time in minutes if this feature is enabled.	9999.9999	Decimal	Optional	FORMAT: Decimal
22	MiscTime	Visit miscellanies time in minutes if this feature is enabled.	9999.9999	Decimal	Optional	FORMAT: Decimal
23	MoneySpent	Money spent if this feature is enabled	9999.9999	Decimal	Optional	FORMAT: Decimal
24	PayerName	The full name of the Payer associated with the visit.	64	String	Optional	LIVE DATA
25	Contract	Service Contract information.	9	String	Optional	LIVE DATA
26	Discipline	Discipline assigned to the employee.	17	String	Optional	LIVE DATA
27	Service	Service description.	12	String	Optional	LIVE DATA

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
28	CaseNumber	Case number sent as part of the schedule record.	9	String	Optional	LIVE DATA
29	LiveInFlag	Live in flag. Allowed values are Y, N	1	String	Optional	Y N
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	Optional	See description.
31	VisitId	Visit unique key. This value is unique to Sandata's EVV system.	64	String	Required	LIVE DATA
32	Department	Employee's department.	3	String	Optional	LIVE DATA
33	EmployeeId	Unique employee identifier in the source system.	10	String	Optional	EMPLOYEE FULL SSN
34	ApprovalUserName	User Name of approving user	30	String	Optional	LIVE DATA
35	ApprovalDateTime	Approval Date/Time		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
36	AdjustedIn	Adjusted Time In		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
37	AdjustedOut	Adjusted Time Out		DateTime	Optional	FORMAT: YYYY-MM-DDTHH:MM:SSZ
38	ESVInScore	EVV In Score (Percentage Probability)	3	String	Optional	LIVE DATA
39	ESVOutScore	EVV Out Score (Percentage Probability)	3	String	Optional	LIVE DATA
40	CSVInScore	Client EVV In Score (Percentage Probability)	3	String	Optional	LIVE DATA
41	CSVOutScore	Client EVV Out Score (Percentage Probability)	3	String	Optional	LIVE DATA
42	EVVCallInPhoneType	C = Cell, L=Landline, blank = other	1	String	Optional	C L NULL
43	EVVCallOutPhoneType	C = Cell, L=Landline, blank = other	1	String	Optional	C L NULL
44	Memo	The free form memo field from Sandata EVV.	1024	String	Optional	FORMAT: Free text
45	CarFare	Car Fare if feature is enabled.	4	String	Optional	LIVE DATA

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
46	BillRate	Rate for billing.	6	Decimal	Optional	FORMAT: Can have values like 5.043 or 1.23 and should not exceed 6 characters. Decimal point is included in the length.
47	ProcCodeQualifier	The procedure code qualifier used in the 837. Most frequent value: 'ZZ'	2	String	Optional	LIVE DATA
48	ProcedureCode	This is the billable procedure code. It can be the HPCS number.	5	String	Optional	See Appendix 2 HCPCS column
49	PayerProgram	The program to which this recipient belongs.	9	String	Optional	See Appendix 1 ProgramID column
50	PayRate	Rate for payroll.	5	String	Optional	FORMAT: Can have values like 5.043 or 1.23 and should not exceed 5 characters. Decimal point is included in the length.
51	ARNumber	Accounts Receivable number or any other number that can be used to identify the client.	10	String	Optional	LIVE DATA
52	Modifier1	First modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns
53	Modifier2	Second modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns
54	Modifier3	Third modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns
55	Modifier4	Fourth modifier if applicable. Authorizations may include modifier information to be used for service provision and billing.	3	String	Optional	See Appendix 2 Modifier columns
56	VisitLocationType	Location of the visit. Valid values to be determined during program implementation.	2	String	Optional	Home Community

3.3 Task

Index	Element [Column Name]	Description	Max Length	Type	Required?	Expected Value(s) / Format / Validation Rules
1	VisitId	Visit unique key.	64	String	Yes	LIVE DATA
2	ScheduleID	Unique Identifier for the schedule record from the source system. Used to update the schedule in subsequent transfers.	40	String	Optional	LIVE DATA
3	TaskID	Task id, this task id must map to the Task IDs used for the agency in the Sandata system.	4	String	Yes	See Appendix 5 TaskID column
4	Reading	Task reading.	4	String	Optional	LIVE DATA
5	Unit	Task unit.	8	String	Optional	LIVE DATA

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	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 Tasks

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

Task ID	Description
0039	Specimen Collection
0079	Make Bed
0085	Skin Care or Protocol with necrotic tissue
0086	Skin Care or Protocol infected and draining
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

Task ID	Description
0166	Vital Sign: Pulse
0167	Vital Sign: Respiration
0168	Vital Sign: Weight
0186	Change Linens

6 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

7 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)