REQUIREMENT SPECIFICATION

for Receipt of Alternate Electronic Visit Verification Systems Data (altEVV)

Part of the Open EVV Series of Interfaces

Version 5.8

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Version Update

Name	Title	Changes	Date
Ajay Bagga	Product Delivery Owner	Document Created	12.07.2017
Arushan Davydov	Dir. Business System Analysis	1. Reviewed	12.27.2017
Judy Ross	VP Technical Product Management	Final Review	01.11.2018
Ajay Bagga	Product Delivery Owner	Added 1 new fields in the visit element	05.30.2018
Ajay Bagga	Product Delivery Owner	Added fields in the Client element, Visit element and Client Payer information element	07.18.2018
Ajay Bagga	Product Delivery Owner	Added IsPatientNewBorn field to the patient element Fixed XML Structure	08.01.2018
Ajay Bagga	Product Delivery Owner	Added ClientPayerID in the Client Payer Information element and updated the XML structure	08.07.2018
Ajay Bagga	Product Delivery Owner	ProviderID length was updated to 50 STRING	08.14.2018
Ajay Bagga	Product Delivery Owner	Added Modifiers to Visit General	08.21.2018
Ajay Bagga	Product Delivery Owner	Changed SequenceID to be Number from STRING	08.29.2018
Ajay Bagga	Product Delivery Owner	Changed type for SequenceID field	09.24.2018
Ajay Bagga	Product Delivery Owner	Removed elements- Message Acknowledgement and Response for Record Status Changed version to 5.4	09.24.2018
Ajay Bagga	Product Delivery Owner	Fixed spelling error for ExceptionAcknowledged Updated length and description for TelephonyPIN Updated document version to 5.6	09.26.2018
Ajay Bagga	Product Delivery Owner	Added ClientIDQualifier in the Visit General Information element	10.02.2018
Ajay Bagga	Product Delivery Owner	Added EmployeeIDQualifier in the Visit General Information element	10.03.2018

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1. Overview

The specification is intended to document the requiements for using the Sandata Real Time Interface (part of the Open EVV Series of Interface) for receiving information from 3rd party EVV Vendors into the Sandata Aggregator. This interface is also refered to as the Alternate EVV Data Interface of altEVV. An Alternate EVV Data Collection System will build one data pipe to the Aggregator and send synchronous data 'packages' per defined provider agency.

This interface includes clients, employees, visits, and their associated calls as well as the ability to send data related to visit modifications.

A companion guide will be created for each Payer / Program implemented to specify agreed upon frequencies, additional required fields and those fields which will be omitted or left to the sender's discretion.

1.1. Intended Audience

The intended audiences of this document is:

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

1.2. Transmission Frequency

For optimal system performance, it is recommended that visits should be sent in near real time. It is expected that information is sent as it is added/changed/deleted in the Alternate EVV Data Collection System. Note that rejection responses will be delivered on a separate API call that is initiated by the third party–in near real time.

1.3. Transmission Limits

A single transaction may contain from 1 to 5,000 records. A single record set would include all associated elements.

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

During peak loads, records received may be queued and processed as resources permit. Other transactions received for the Provider ID will be queued behind these until they are processed since they must be processed in the proper order.

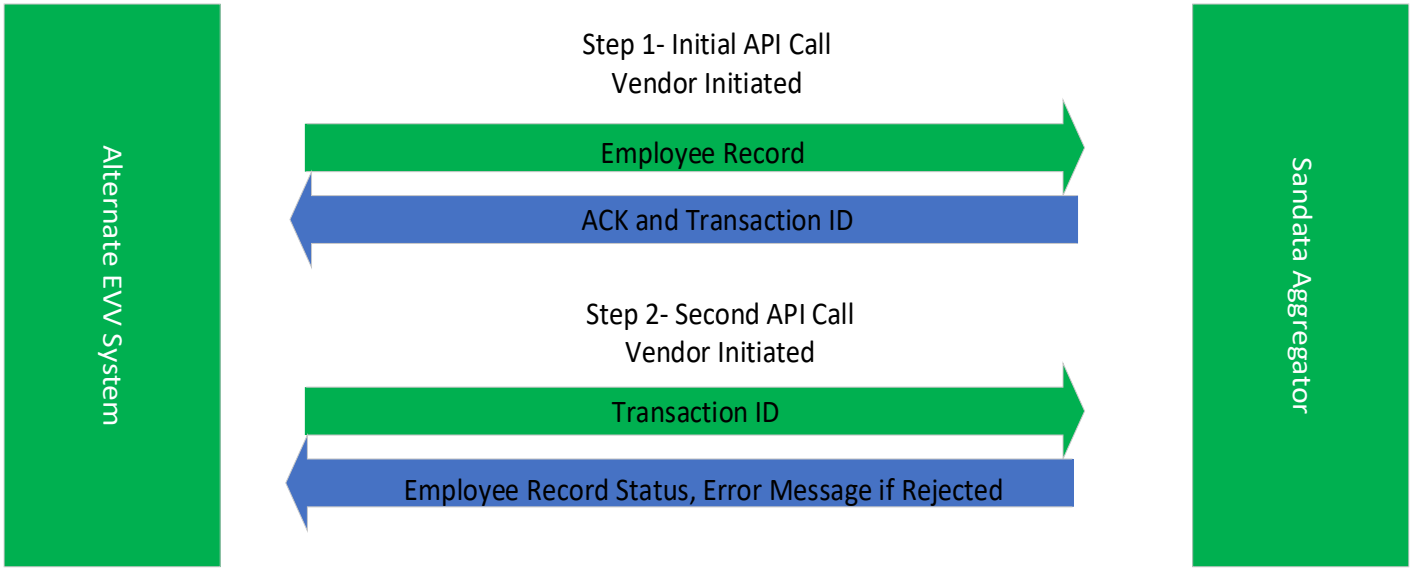
1.4. Document Conventions

DateTime format:
Throughout this document DateTime represents a specific instant of time. The value space of DateTime is the space of combinations of date and time of day values as defined in ISO 8601. For example, to indicate 5:20 pm on January 15th, 1999 for Eastern Standard Time which is 5 hours behind Coordinated Universal Time (UTC), one would write: 1999-01-15T22:20:00Z.

Naming convention: Payer/State _EVV_AltEVV_SEGMENT_mmddyy_HH_mm_ss.json.

1.5. Rejected Record Process

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



1.6. New Record and Updates

New records and updates for previously sent data should be provided via the three previously-mentioned interfaces ('data packages'). If a set of records is sent (client, employee, visit), all associated applicable elements should be sent. Partial updates will be rejected. An update that deletes a record will not actually remove information since Sandata will not physically delete information. The deleted record/s will no longer be visible on the application. However, the record history will maintain the original data received.

1.7. Transmission Method

Sandata supports an SOA architecture. Sandata will provide an API for 3rd party vendors or agency's internal IT organizations to utilize. Sandata will provide sample JSON or XML format information (Java equivalent to XML), as well as the WADL (JSON equivalent of the WSDL) to those parties developing the interface. This specification will include the rest endpoints needed to request status on record acceptance /rejection.

1.8. Format

The user will send information in **JSON or XML** format. JSON orXML, allows multiple "child" entities for a parent.

The format of the information sent must match exactly the format defined below and must be sent via web service using JSON or XML. Ultimately, we support only three data types during transmission: string, number and boolean. The specification uses more additional data types to ensure that data is received in the expected formats and appropriate record level editing can be incorporated. Except where numeric, the assumed JSON

and XML format should be string. The data type provided in the specification is based on the following field definitions.

Data Type	Detail Description		Format/ Example
DATE/TIME	Alpha-numeric	The date and time together in a data string. All times will be provided and expected in UTC. If time is not material, it will be provided as is expected.	Format: YYYY-MM-DDTHH:MM:SSZ Example: 2016-12-20T16:10:28Z
DATE **(only date)**	Alpha-numeric	If the value is only date, it will provided with: YYYY-MM- DD (10 characters) ONLY date is significant. Date only will be sent in UTC format.	Format: YYYY-MM-DD Example: 2016-12-20
TIMEZONE	Alpha-numeric	For Payer/State ALL time for tracking visits will be in UTC format. (All time zone values will be derived from the Internet Assigned Numbers Authority (IANA) Time Zone Database, which contains data that represents the history of local time for locations around the globe. It is updated periodically to reflect changes made by political bodies to time zone boundaries, UTC offsets, and daylight-saving rules.) The Timezone name expected in each transaction is the actual Timezone where the event took place. i.e. US/Eastern.	
STRING	Alpha-numeric (Unless otherwise specified)	A string is a row of zero or more characters that can include letters, numbers, or other types of characters as a unit, not an array of single characters. (e.g. plain text).	Example: string (55644555)
INTEGER	Numeric	An integer is a numeric value without a decimal. Integers are whole numbers and can be positive or negative.	Example: (positive number): 999999 Example: *(negative number):* -999999

Data Type	Detail Description		Format/ Example
DECIMAL	Numeric	A number with a decimal is referred to as a decimal.	Example: 9999.9999 Example: (positive number): 999.999 Example: *(negative number):* -999.999
BOOLEAN	Logical	Two values allowed: true or false	Example: -true -false

Note that the format is case sensitive. All field names must be provided in EXACTLY the casing used in the definitions below. Sandata can handle RESTful and SOAP but it is highly recommended using RESTful services with JSON formatting.

1.9. Rules

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

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

- ✓ There will be 3 independent types of data provided through the Alternate EVV interface:
  - Clients;
  - Employees (Field Staff); and
  - Visit Information.

Each will be sent individually but can be delivered through the same single connection (or "pipe").

THE ALTERNATE DATA COLLECTION SYSTEM WILL BE RESPONSIBLE FOR:

- ✓ Visit transmittals. Visits should be transmitted near real time. Actual payer frequency requirements may vary. Note that rejection responses will be delivered as separate API calls initiated by the third party. Information should be sent for only those records that are added, changed, or deleted. This is considered to be an incremental interface. Records which have not changed should not be resent.

- ✓ Complete transmissions.

- When sending a client, all applicable elements and sub elements must be sent during each transmission.
- When sending an employee, all applicable elements and sub elements must be sent during each transmission.
- When sending a visit, all applicable elements and sub elements must be sent during each transmission.

✓ Call matching. Calls received--regardless of the collection method used by the Alternate Data Collection System--are received together into a complete visit by the Aggregator, per the specification. Sandata will not attempt to match or rematch the visits received.

✓ Data quality. all data will be accepted from third party data "as is," including any calculated fields.

✓ Latitude and Longitude. Alternate EVV Data Collection Systems are responsible for providing latitude and longitude on all client addresses provided. Latitude and longitude must be provided for both the visit start and visit end time, assuming it is collected via a GPS-enabled device.

✓ Assigning sequence numbers. For each of the 3 types of records (client, employee, visit), the Alternate Data Collection System will be responsible for assigning sequence numbers for each interface to ensure that updates are applied in the appropriate sequence. If a record is rejected, an incremented sequence is expected on the next transmission of that record set. Sequence numbers are per unique record (client, employee, visit) and record set (modifications to the same client, employee, visit). For example, the first time a particular client is sent, the sequence would be set to 1. The second time that same client is sent, the sequence would be set to 2, etc.

✓ Having the ability to correct defined exceptions. Exceptions must be corrected using the standard set of reason codes provided by Payer/State. Some of the defined reason codes require additional text to provide additional information; this information must also be sent as part of this interface.

✓ Change log transmission. Changes made to all visit information must be fully logged, and the log information must be transmitted as part of the visit record, as applicable.

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

GENERAL PROCESSING RULES:

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

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

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

- ✓ Any record without a sequence number will be rejected. Sequence numbers are per unique record (client, employee, visit). For example, the first time a particular client is sent, the sequence would be set to 1. The second time the same client is sent, the sequence would be set to 2, etc.

- ✓ Records will be processed in the order received using the assigned sequence number.

- ✓ If a record that has been received has a sequential number that is less than the one already processed, it WILL BE PROCESSED, but will be logged as "received" and inserted into history. It will not be considered to be the current record.

- ✓ Header information as determined for the payer and program must be included in each transmission for each record (client, employee, visit), otherwise the entire collection of records will be rejected.

CLIENT RULES:
The following represents a subset of the requirements for client information. Please see the Field Information section of this document for all applicable rules.

- ✓ If the client does not include at least 1 address with a latitude and longitude, the client will be rejected.

- ✓ If the client does not include the defined unique identifier, the client will be rejected.

- ✓ If the client does not include a Client Other ID (external ID) and Sequence ID, the client will be rejected.

- ✓ If the client does not include first name, last name and time zone, the client will be rejected.

EMPLOYEE RULES:
The following represents a subset of the requirements for employee information. Please see the Field Information section of this document for all applicable rules.

- ✓ If the employee 9-digit social security number is required for the payer / program and this value is not provided, the employee will be rejected.

- ✓ If Staff Other ID (External ID), Sequence ID and Staff ID are not provided, the employee will be rejected.

- ✓ If employee first name and last name are not provided, the employee will be rejected.

VISIT RULES

- ✓ No Client Provided - To allow the Aggregator to determine if the visit is for a Payer/State client, the visit must include a client. If a visit does not include a client, the complete visit will be rejected.

- ✓ Invalid/Unknown Client Provided - To allow the Aggregator to determine if the visit is for a Payer/State Client, the visit must include a valid client. If a visit includes a client that is unknown to Sandata (has not been received and accepted), the complete visit record will be rejected.

- ✓ No Employee Provided / Invalid or Unknown Employee Provided - If a visit does not include an employee (visit record send without an employee associated), the visit will be accepted and the 'Unknown Employee' exception will be calculated and applied. This record is accepted but raises an exception.

- ✓ The Alternate EVV system is expected to be able to handle a visit that crosses calendar days.

- ✓ A visit can only be cancelled if it does not have any calls associated with it or any adjusted times. If a visit has these elements, the "Bill Visit" indicator should be set to False to indicate that the visit does not require any further processing. The visit status will be set to Omit by the Aggregator.

- ✓ The following rules apply to the dates and times provided for the visit:

Date and Time Exists for the Following:				
Call In	Call Out	Adjusted In	Adjusted Out	Rule
x	x			Call Out must be > Call In Otherwise record rejected.
Superseded by Adj. In	Superseded by Adj. Out	X	x	Adj. Out must be > Adj. In Otherwise record rejected.
x	Superseded by Adj. Out		x	Adj. Out must be > Call In Otherwise record rejected.
Superseded by Adj. In	x	X		Call Out must be > Adj. In Otherwise record rejected.

- ✓ Upon receipt, Sandata will calculate all configured Payer/Program exceptions and apply those exceptions as applicable. For those exceptions that may be recalculated over the life of the visit, these exceptions will be calculated as appropriate.

- ✓ It is assumed that there are some exceptions cannot be "fixed" in the Alternate Data Collection System by their nature. They are configured for the Payer/State program as requiring acknowledgement by the system user. One of the included visit elements provides the ability for the user to send their acknowledgement. These exceptions require attestation that the exception has been reviewed/acknowledge in the system along with the appropriate reason code and attestation that appropriate documentation exists. Exceptions are specific to a given Payer/Program and will be noted in the associated companion guide.

- ✓ Upon receipt, Sandata will calculate and apply visit status as defined for the Payer/Program.

- ✓ The Alternate Data Collection System will be expected to send a reason code and attestation that proper documentation exists for any manual entry or edit with each change sent. Based on the definitions of the reason codes, some reason codes require additional information explaining the change. If additional

information is required, the alternate data collection system must collect the information and include it when transmitting the visit to Sandata. (Note: Sandata uses a resolution code to collect an attestation that appropriate documentation supporting a manual entry or edit exists.)

1.10. Sequencing

The SequenceID on all three types of records (clients, employees, visits) should be independent per record and should be incremented each time any record is sent. The Sequence ID will be used to ensure that a record is processed only once and that the most current information is used for reporting and claims processing. In the event a visit update is not accepted (rejected), the SequenceID on that transmission should not be reused. The next update should increment to the next number in the sequence. Failure to do so will cause the new record to be rejected as a duplicate.

Sequence Rules:

- If the latest SequenceID is greater than the highest value previously received, the record set will not be rejected. i.e. latest SequenceID = 5, previous SequeceID = 4 ➔ Record accepted and latest record is displayed.
- If the latest SequenceID is less than the value previously received, and the record has not yet been processed, it will be accepted and recorded as historical information. i.e. latest SequenceID = 8, previous SequenceID = 10 ➔ Record accepted and latest record is still SequenceID = 10.
- If the Sequence ID is equal to a value previously received, it will be rejected. i.e. latest SequenceID = 15, previous SequenceID = 15 ➔ Record rejected.
- Gaps in sequence will be allowed.

Please Note:

For those agencies that wish to use the Alternate EVV interface, and would prefer to use timestamps as the sequence number in their deliveries, the Sandata system can accept the timestamp value as the sequence number, under two conditions:

1. *The timestamp value provided must contain only numbers, and no other symbols (i.e. "/", "-", and ":" characters removed)*
2. *The timestamp value provided must be formatted as YYYYMMDDHHMMSS. For example:*

2. Field Information

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.

2.1. Provider Identification

Column Name (Required)	Description	Max Length	Type
ProviderQualifier	Identifier being sent as the unique identifier for the provider. Values: SandataID, NPI, API, MedicaidID, TaxID, Taxonomy, Legacy, Other.	20	String
ProviderID [BusinessEntityMedicaidIdentifier]	Unique identifier for the agency.	50	String

XML Structure

```
<ProviderIdentification>
<ProviderQualifier></ProviderQualifier>
<ProviderID></ProviderID>
<ProviderIdentification>
```

2.2. Client General Information

Additional fields may be required depending on the program; fields below may be ignored if a Payer Client Feed is implemented.

Column Name (Required)	Description	Max Length	Type
ClientID	Assigned client_id. If a value is assigned by another system. Note that this value can be automatically assigned by Sandata EVV. Note that this value may be used as the client identifier for telephony and MVV when Client ID entry is applicable.	10	String
ClientFirstName [PatientFirstName]	Client's First Name.	30	String
ClientMiddleInitial	Client's Middle Initial.	1	String
ClientLastName [PatientLastName]	Client's Last Name.	30	String
ClientQualifier	Value being sent to unique identify the client. Values: ClientSSN; ClientOtherID, ClientCustomID. Should be the same as the value used by the Payer if a client feed is provided by the payer.	20	String

Column Name (Required)	Description	Max Length	Type
ClientIdentifier [PatientOtherID]	Payer assigned client identifier identified by ClientQualifier. If client information is received from the payer, this information will be used to link the received 3rd party EVV information with the payer information provided.	64	String
MissingMedicaidID	Indicator that a patient is a newborn. If this value is provided, Client Medicaid ID will be ignored and will be valid as null. Values True/False	5	String
ClientMedicaidId	Unique ID provided by the State Medicaid program to the client.	64	String
SequenceID	The Third Party visit sequence ID to which the change applied.	16	NUMBER
ClientCustomID	Additional Client User-Defined ID. Commonly used to customize the built-in client ID within the system. Must be provided if billing if in scope. May be equal to another ID provided.	24	String
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
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 zeroes must be included. May be required if needed for billing. Format - #########.	9	String
ClientTimeZone [PatientTimeZone]	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

XML Structure

```
<Client_General_Information>
<ClientID></ClientID>
<ClientFirstName></ClientFirstName>
<ClientMiddleInitial></ClientMiddleInitial>
<ClientLastName></ClientLastName>
<ClientQualifier></ClientQualifier>
<ClientIdentifier></ClientIdentifier>
<MissingMedicaidID></MissingMedicaidID>
<ClientMedicaidID></ClientMedicaidID>
<SequenceID></SequenceID>
<ClientCustomID></ClientCustomID>
<ClientOtherID></ClientOtherID>
<ClientSSN></ClientSSN>
<ClientTimeZone></ClientTimeZone>
```

```
</Client_General_Information>
```

2.3. Client Payer Information

Column Name (Required)	Description	Max Length	Type
PayerID	Sandata EVV assigned ID for the payer. Payer ID is determined during the implementation process.	64	String
PayerProgram	If applicable, the program to which this visit belongs. Potential use and list of values to be determined during implementation.	9	String
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
ClientPayerID	Unique Identifier sent by Payer.	20	String
ClientEligibilityDateBegin (MemberEligibilityDateBegin)	Client Eligibility Begin Date. Format YYYY-MM-DD. This field is optional if ClientStatus is sent.		Date
ClientEligibilityDateEnd (MemberEligibilityDateEnd)	Client Eligibility End Date. Format YYYY-MM-DD. This field is optional if ClientStatus is sent.		Date
ClientStatus (MemberStatus)	The client's current status. Provide the 2-digit code including the 0. Available values: 01 = Pending, 02 = Active, 03 = Hold, 04 = Inactive. This field is optional if ClientEligibilityDateBegin or ClientEligibilityDateEnd is sent.	2	String

XML Structure

```
<Client_Payer_Information>
<PayerID></PayerID>
<PayerProgram></PayerProgram>
<ProcedureCode></ProcedureCode>
<ClientPayerID></ClientPayerID>
<ClientEligibilityDateBegin></ClientEligibilityDateBegin>
<ClientEligibilityDateEnd></ClientEligibilityDateEnd>
<ClientStatus></ClientStatus>
<Client_Payer_Information>
```

2.4. Client Address

At least one record for each client is required. If an address is provided via a Payer feed, this address information will be regarded as secondary based on program rules.

Column Name (Required)	Description	Max Length	Type
ClientAddressType [PatientAddressType]	Values: Home, Business, Other. Note that multiple of the same type can be provided.	12	String

Column Name (Required)	Description	Max Length	Type
ClientAddressIsPrimary [PatientAddressIsPrimary]	One address must be designated as primary Values: true/false	5	String
ClientAddressLine1 [PatientAddressLine1]	Street Address Line 1 associated with this address. PO Box may not acceptable for Billing and PO Box will not function correctly for MVV.	30	String
ClientAddressLine2 [PatientAddressLine2]	Street Address Line 2 associated with this address.	30	String
ClientCounty	County associated with this address	25	String
ClientCity [PatientCity]	City associated with this address.	30	String
ClientState [PatientState]	State associated with this address. Two Character standard abbreviation.	2	String
ClientZip [PatientZip]	Zip Code associated with this address. Required for Billing. 9-digit primary address zip code. If additional 4 digits are not known, provide zeros. Format #########.	9	String
ClientAddressLongitude [PatientAddressLongitude]	Calculated for each address.	(99.999 999999 999999)	Decimal
ClientAddressLatitude [PatientAddressLatitude]	Calculated for each address.	(99.999 999999 999999)	Decimal

XML Structure

```
<ClientAddress>
<ClientAddressType></ClientAddressType>
<ClientAddressIsPrimary></ClientAddressIsPrimary>
<ClientAddressLine1></ClientAddressLine1>
<ClientAddressLine2></ClientAddressLine2>
<ClientCounty></ClientCounty>
<ClientCity></ClientCity>
<ClientState></ClientState>
<ClientZip></ClientZip>
<ClientAddressLongitude></ClientAddressLongitude>
<ClientAddressLatitude></ClientAddressLatitude>
</ClientAddress>
```

2.5. Client Phone - Optional

Column Name (Required)	Description	Max Length	Type
ClientPhoneType [PatientPhoneType]	Values: Home, Mobile, Business and Other. Note that multiple of the same type can be provided.	12	String
ClientPhone [PatientPhoneNumber]	Client phone number. Format ##########.	10	String

XML Structure

```
<Client_Phone>
<ClientPhoneType></ClientPhoneType>
<ClientPhone></ClientPhone>
</Client_Phone>
```

2.6. Responsible Party/Designated Signer- Provide if applicable for the Client.

Column Name (Required)	Description	Max Length	Type
ClientContactType	Client Contact Type. Values: Family, Other.	12	String
ClientContactFirstName [PatientResponsiblePartyFirstName]	Client Contact First Name. Entered by provider agency.	30	String
ClientContactLastName [PatientResponsiblePartyLastName]	Client Contact Last Name. Entered by provider agency.	30	String
ClientContactPhoneType	Client Contact's Phone Type. Values: Business, Home, Mobile, Other.	12	String
ClientContactPhone	Client Contact Home Phone Number. Entered by provider agency. Format ##########.	10	String
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
ClientContactAddressLine1	Client Contact's Street Address, Line 1.	30	String
ClientContactAddressLine2	Client Contact's Street Address, Line 2.	30	String
ClientContactCity	Client Contact's City.	30	String
ClientContactState	Client Contact's State. Two Character standard abbreviation.	2	String
ClientContactZip	Client Contact's Zip Code. 9-digit primary address zip code. If additional 4 digits is not known, provide zeros. Format #########.	9	String

XML Structure

```
<RepsonsibleParty_DesignatedSigner>
<ClientContactType></ClientContactType>
<ClientContactFirstName></ClientContactFirstName>
<ClientContactLastName></ClientContactLastName>
<ClientContactPhoneType></ClientContactPhoneType>
<ClientContactPhone></ClientContactPhone>
<ClientContactEmailAddress></ClientContactEmailAddress>
<ClientContactAddressLine1></ClientContactAddressLine1>
<ClientContactAddressLine2></ClientContactAddressLine2>
<ClientContactCity></ClientContactCity>
<ClientContactState></ClientContactState>
<ClientContactZip></ClientContactZip>
</RepsonsibleParty_DesignatedSigner>
```

2.7. Employee General Information

Column Name (Required)	Description	Max Length	Type
EmployeeQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String
EmployeeIdentifier [StaffID]	Employee identifier identified by EmployeeQualifier. If employee information is received from the payer, this information will be used to link the received 3rd party EVV information with the payer information provided and should be defined as the same value.	9	String
EmployeeOtherID [StaffOtherID]	Unique employee identifier in the external system, if any.	64	String
SequenceID	The Third Party visit sequence ID to which the change applied	16	NUMBER
EmployeeSSN [StaffSSN]	Employee Social Security Number. Employee SSN may be required depending on the program rules.	9	String
EmployeeLastName [StaffLastName]	Employee's Last Name	30	String
EmployeeFirstName [StaffFirstName]	Employee's First Name	30	String
EmployeeEmail [StaffEmail]	Employee's Email Address	64	String
EmployeeManagerEmail	Email of the Employee's Manager	64	String
EmployeeAPI	Employee Client's Alternate Provider Identifier or Medicaid ID.	25	String
As many employee positions can be provided as appropriate for the employee.			
EmployeePosition [StaffPosition]	Values for Payer/State Programs to be determined during implementation.	3	String

XML Structure

```
<Employee_GeneralInformation>
<EmployeeQualifier></EmployeeQualifier>
<EmployeeIdentifier></EmployeeIdentifier>
<EmployeeOtherID></EmployeeOtherID>
<SequenceID></SequenceID>
<EmployeeSSN></EmployeeSSN>
<EmployeeLastName></EmployeeLastName>
<EmployeeFirstName></EmployeeFirstName>
<EmployeeEmail></EmployeeEmail>
<EmployeeManagerEmail></EmployeeManagerEmail>
<EmployeeAPI></EmployeeAPI>
<EmployeePosition></EmployeePosition>
</Employee_GeneralInformation
```

2.8. Visit General Information

Column Name (Required)	Description	Max Length	Type
VisitOtherID	Visit identifier in the external system	50	String
SequenceID	The Third Party visit sequence ID to which the change applied	16	NUMBER
EmployeeQualifier	Value being sent to unique identify the employee. Values: EmployeeSSN, EmployeeRegID, EmployeeCustomID.	20	String
EmployeeIdentifier [StaffID]	Employee identifier identified by EmployeeQualifier. If employee information is received from the payer, this information will be used to link the received 3rd party EVV information with the payer information provided and should be defined as the same value.	9	String
EmployeeOtherID [StaffOtherID]	Unique employee identifier in the external system, if any.	64	String
GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group.	6	String
ClientIDQualifier	Value being sent to unique identify the client. Values: ClientID, ClientSSN; ClientOtherID, ClientCustomID. Should be the same as the value used by the Payer if a client feed is provided by the payer.	20	String
ClientID	Identifier used in the client element.	64	String
ClientOtherID [PatientOtherID]	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
VisitCancelledIndicator	true/false – allows a visit to be cancelled / deleted based on defined rules.	5	String
PayerID	Sandata EVV assigned ID for the payer. Payer ID is determined during the implementation process.	64	String
PayerProgram	If applicable, the program to which this visit belongs. Potential use and list of values to be determined during implementation.	9	String
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
Modifier1	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String
Modifier2	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String
Modifier3	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String

Column Name (Required)	Description	Max Length	Type
Modifier4	Modifier for the HCPCS code for the 837. Up to 4 of these are allowed. Please consult specific program requirements for exact usage.	2	String
VisitTimeZone [TimeZone]	Visit primary time zone. Depending on the program, this value may be defaulted or automatically calculated. Please see the appendix for acceptable values. Should be provided if the visit is occurring in a time zone other than that of the client.	64	String
ScheduleStartTime (StartTime)	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.		Date Time
ScheduleEndTime (EndTime)	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.		Date Time
AdjInDateTime	Adjusted in date/time if entered manually. Otherwise the actual date/time received.		Date Time
AdjOutDateTime	Adjusted out date/time if entered manually. Otherwise the actual date/time received.		Date Time
BillVisit	True/False. If the visit is going to be billed, should be sent as Y. Otherwise N.	5	String
HoursToBill	Hours that are going to be billed.	99.999	Decimal
HoursToPay	If payroll is in scope for the payer program, the hours to pay.	99.999	Decimal
Memo [VisitMemo]	Associated free form text.	512	String
ClientVerifiedTimes [MemberVerifiedTimes]	true/false	5	String
ClientVerifiedTasks	true/false	5	String
ClientVerifiedService [MemberVerifiedService]	true/false	5	String
ClientSignatureAvailable [MemberSignatureAvailable]	true/false The actual signature will not be transferred. The originating system will be considered the system of record.	5	String
ClientVoiceRecording [MemberVoiceRecording]	true/false The actual voice recording will not be transferred. The originating system will be considered the system of record.	5	String

XML Structure

```
<VisitGeneralInformation>
<VisitOtherID></VisitOtherID>
<SequenceID></SequenceID>
```

```
<EmployeeOtherID></EmployeeOtherID>
<EmployeeIdentifier></EmployeeIdentifier>
<GroupCode></GroupCode>
<ClientOtherID></ClientOtherID>
<ClientIdentifier></ClientIdentifier>
<VisitCancelledIndicator></VisitCancelledIndicator>
<PayerID></PayerID>
<PayerProgram></PayerProgram>
<ProcedureCode></ProcedureCode>
<VisitTimeZone></VisitTimeZone>
<ScheduleStartTime></ScheduleStartTime>
<ScheduleEndTime></ScheduleEndTime>
<AdjInDateTime></AdjInDateTime>
<AdjOutDateTime></AdjOutDateTime>
<BillVisit></BillVisit>
<HoursToBill></HoursToBill>
<HoursToPay></HoursToPay>
<Memo></Memo>
<ClientVerifiedTimes></ClientVerifiedTimes>
<ClientVerifiedTasks></ClientVerifiedTasks>
<ClientVerifiedService></ClientVerifiedService>
<ClientSignatureAvailable></ClientSignatureAvailable>
<ClientVoiceRecording></ClientVoiceRecording>
</VisitGeneralInformation>
```

2.9. 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.

Column Name (Required)	Description	Max Length	Type
CallExternalID	Call identifier in the external system	16	String
CallDateTime	Event date time. Must be at least to the second.		Date Time
CallAssignment	Values: Time In, Time Out, Other	10	String
CallType	The type of device used to create the event. Values: IVR, FVV, MVV, MANUAL, NONSTX, OTHER Any call with GPS data collected should be identified as Mobile.	20	String
ProcedureCode	This is the billable procedure code if identified on the call. For most programs, it is the HCPCS number.	5	String
ClientIdentifierOnCall [PatientIdentifierOnCall]	If a client identifier was entered on the call, this value should be provided.	10	String
MobileLogin	Log in used if a mobile application is in use for GPS calls.	64	String
CallLatitude	Latitude for GPS. Required for CallType = Mobile.	-90 +90	Decimal
CallLongitude	Longitude for GPS. Required for CallType = Mobile.	-180 +180	Decimal
Location	Specific values to be provided based on the program.	25	String

Column Name (Required)	Description	Max Length	Type
TelephonyPIN	PIN for telephony. Identification for the employee using telephony. The recommended value by Sandata is between 4 to 9 numbers.	9	Number
OriginatingPhoneNumber	Originating phone number for telephony.	10	String

XML Structure

```
<Calls>
<CallExternalID></CallExternalID>
<CallDateTime></CallDateTime>
<CallAssignment></CallAssignment>
<CallType></CallType>
<ProcedureCode></ProcedureCode>
<ClientIdentifierOnCall></ClientIdentifierOnCall>
<MobileLogin></MobileLogin>
<CallLatitude></CallLatitude>
<CallLongitude></CallLongitude>
<Location></Location>
<TelephonyPIN></TelephonyPIN>
<OriginatingPhoneNumber></OriginatingPhoneNumber>
</Calls>
```

2.10. Visit Exception Acknowledgement

Column Name (Required)	Description	Max Length	Type
ExceptionID	ID for the exception being acknowledged. Exact values for exceptions implemented are based on program rules.	2	String
ExceptionAcknowledged	true/false	5	String

XML Structure

```
<Visit_Exception_Acknowledgement>
<ExceptionID></ExceptionID>
<ExceptionAcknowledged></ExceptionAcknowledged>
</Visit_Exception_Acknowledgement>
```

2.11. Visit Changes

Column Name (Required)	Description	Max Length	Type
SequenceID	The Third Party visit sequence ID to which the change applied	16	NUMBER
ChangeMadeBy [ChangeMadeByEmail]	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
ChangeDateTime	Date and time when change is made. At least to the second.		Date Time
GroupCode	This visit was part of a group visit. Group Code is used to reassemble all members of the group.	6	String
ReasonCode	Reason Code associated with the change.	4	String
ChangeReasonMemo	Reason/Description of the change being made if entered.	256	String
ResolutionCode	Resolution Codes if selected. Resolution Codes are specific to the program.	4	String

XML Structure

```
<VisitChanges>
<SequenceID></SequenceID>
<ChangeMadeBy></ChangeMadeBy>
<ChangeDateTime></ChangeDateTime>
<GroupCode></GroupCode>
<ReasonCode></ReasonCode>
<ChangeReasonMemo></ChangeReasonMemo>
<ResolutionCode></ResolutionCode>
</VisitChanges>
```

3. Appendix

3.1. Assumptions

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

3.2. Other Important Points to Note

Please note that this list will have periodic additions as new functionality is added and made available for transmission from Alternate EVV systems.

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

3.3. Legend

LEGEND	
Field Name	***Other possible Naming***
Client	***Individual*** ***Member*** ***Patient*** ***Recipient***
Employee	***Caregiver*** ***Consumer Directed Worker*** ***Home Health Aide*** ***Staff*** ***Worker***
Provider	***Agency*** ***Third Party Admin (TPA)***
Payer	***Admission*** ***Contract*** ***Insurance Company*** ***Managed Care Organization (MCO)*** ***State***
Contract	***Program***

LEGEND	
Field Name	***Other possible Naming***
	Program Code
HCPCS	***Bill Code*** ***Procedure Code*** ***Service***

3.4. Acronyms and Definitions

Term	**Definition**
AKA	Also Known As
API	Application Programming Interface
GMT	Greenwich Mean Time
HTTP	Hypertext Transfer Protocol
JSON	JavaScript Object Notation
SOAP	Simple Object Access Protocol
SRS	System Requirement Specifications
TBD	To Be Determined
UTC	Universal Time Coordinated
XML	Extensible Markup Language

3.1. Time Zone List

This is the common list of time zone we used. If your area is not covered by this list please contact Sandata support to get additional time zone value that we accept. Please note that the value sent must exactly match the value and case shown.

Text Value	**Daylight Saving**
US/Alaska	Active
US/Aleutian	Active
US/Arizona	Inactive
US/Central	Active
US/East-Indiana	Active
US/Eastern	Active
US/Hawaii	Inactive
US/Indiana-Starke	Active
US/Michigan	Active
US/Mountain	Active
US/Pacific	Active

Text Value	Daylight Saving
US/Samoa	Inactive
America/Indiana/Indianapolis	Active
America/Indiana/Knox	Active
America/Indiana/Marengo	Active
America/Indiana/Petersburg	Active
America/Indiana/Vevay	Active
America/Indiana/Vincennes	Active
Canada/Atlantic	Active
Canada/Central	Active
Canada/East-Saskatchewan	Inactive
Canada/Eastern	Active
Canada/Mountain	Active
Canada/Newfoundland	Active
Canada/Pacific	Active
Canada/Saskatchewan	Active
Canada/Yukon	Active
America/Puerto_Rico	Inactive