

Reports in EVV and Aggregator

Introduction

The Reports tabs in Sandata EVV and Sandata Aggregator are used to view and export data. You can use the reports functionality to see a summary of your EVV system organized in different ways.

- If you are using Sandata EVV, changes to the data will need to be made in Data Entry, Security, and/or Visit Maintenance.
- If you are using an alternate vendor, changes to data will need to be made in your source system.
- Reports are a free and optional resource available to all providers.

Frequent EVV terms can be found in the Appendix to this document.

EVV report types include:

1. Daily reports – 7 reports available
2. Date range reports – 6 reports available
3. Billing reports – 1 report available
4. Security reports – 3 reports available (*only available to Aggregator users*)

Daily Reports

Daily reports can only be run for a 24-hour period.

Report Name	Included Fields	How can this report help me?
Active Clients	Client ID, Client Medicaid ID , Client Name, Phone Number, Address, City, State, Zip Code, Latitude, Longitude, Alternate Medicaid ID	View active clients and related data for your EVV account. This information is required to be accurate to record a successful EVV visit.
Active Employees	Employee ID, Employee Name, Employee Email, Employee Santrax ID , Phone Number, Department	View active employee(s) and related data for your EVV account. This information is required to be accurate to record a successful EVV visit. Independent providers – this is where you can look up your Santrax ID.
Call Listing	Service, Client ID, Client Medicaid ID, Client Name, Phone Number, Employee Name, Employee Santrax ID, Call Type, Call Time, Group Visit Code, Indicators	Review visit activity for the date selected.
Call Summary	Service, Client ID, Client Medicaid ID, Client Name, Phone Number, Employee Name, Employee Email, Employee Santrax ID, Start Time, End Time, Hours, Bill Hours, Units	Calculate unit totals for each visit.

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GPS Distance Exception	Client ID, Client Name, Client Medicaid ID, Employee ID, Employee Name, Employee Email, Call Date, Call Time, Service, Distance, Closest Client Address	For visits captured via the application that include GPS information, view the location of the call, and how far the call was placed from the client address, represented in latitude and longitude.
Visit Listing	Payer, Account , Account Name, Provider Medicaid ID , Client Name, Client Medicaid ID, Employee Name, Employee Santrax ID, Start Time, End Time, Group Visit Code, Status	View the Sandata EVV account number associated with your provider Medicaid ID. This report is a summary of the Date Range Report > Full Visit Export.
Visit Verification	Client Medicaid ID, Client Name, Phone Number, Employee Name, Employee Santrax ID, Visit Date, Start Time, End Time, Hours (Scheduled, Actual, Adjusted), Bill Hours, Client Verification (Time, Service, Signature)	View a summary of all visits, including the client verification details. Note: visit verification is no longer required for purposes of EVV.

Date Range Reports

Date range reports can be run for a period longer than 24 hours. The exact period is defined in the Date Range section of the run reports screen.

Report Name	Included Fields	How can this report help me?
Client Visit Summary	Program, Service , Employee Santrax ID, Employee Email, Employee Name , Visit Date, Number of Visits, Hours	View visits sorted by client.
Detail Visit Status	Visit ID, Client Medicaid ID, Phone Number, Employee Name, Service, Group Visit Code, Visit Date, Start Time, End Time, Hours (Scheduled, Actual, Adjusted), Unresolved Exceptions	View a list of all missing or inaccurate data points on incomplete visits.
Full Visit Export	All visit information captured across the date range, and records for clients and employees involved in each visit.	Verify all visit details and associated records. Alt EVV users: ensure information from the source system correctly displays in the aggregator.
Summary Visit Status	Visit Status, Visit Age (chart layout)	Identify visits that have been in an unresolved or unmatched visit status for longer than 24 hours.
Visit Log	Program, Service, SPV, Priority, Employee Name, Visit Date, Hours (Scheduled, Actual, Adjusted), Bill Hours, Rate, Reason Codes	View the reason codes applied to modified visits.

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Visit Verification Activity Summary	Edited Value, User, Edit Date, Edit Time, Client Medicaid ID, Client Name, Employee Name, Employee Santrax ID, Service, Group Visit Code, Visit Date, Hours (Scheduled, Actual, Adjusted), Bill Hours, Units, Reason Codes, Omit	Review all edits made to visits and identify the user who made the edit.
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Billing Reports

Report Name	Included Fields	How can this report help me?
Visit Claims Verification Status	Payer, Program, Service, HCPCS, Client Name, Medicaid ID, Visit Date, Start Time, End Time, Visit Status, Batch ID, Transaction ID, Visit Verified Date	For processed visits, view the matching claim data and date the visit was returned from the claims adjudication system.

Security Reports (Aggregator Only)

Report Name	Included Fields	How can this report help me?
Member Access	Provider ID, Account Name, Account, Log In, Log Out, User ID, User First Name, User Last Name, Request Start, Request End, Module Name, Privilege, Description, Access Time, Client Medicaid ID, Client Alternate Medicaid ID, Client Key, Client ID, Client First Name, Client Last Name, Client Middle Name	View each privilege accessed by a user. For example, view the date and time a report was run, and who ran the report.
System Activity	Provider ID, Provider Name, Log In Time, Log Out Time, Username, User Full Name (Last, First), Request Start, Request End, Module, Privilege, Description	View audit activity by user. For example, view the date and time data entry was opened, and who initiated the open.
User Login History	Provider ID, Account, Account Name, User ID, Username, Log In, Log Out, IP Used	View the login history and location for each user.

Appendix - Definitions

- Alternate (Alt) EVV: A vendor other than Sandata, used to record EVV visits and manage records
- Client: An individual receiving EVV services
- Employee: A direct care worker employed by an agency
- Exception: An indicator of missing or inaccurate visit information
- Sandata EVV: An online portal used to record EVV visits and manage records
- Sandata Aggregator (for alternate EVV system users): An online portal used to display information from the provider source system
- User: A provider with unique sign-in credentials to Sandata EVV and/or Aggregator