Sandata

Get more right from the start

Connecticut Department of Mental Health and Addiction Services

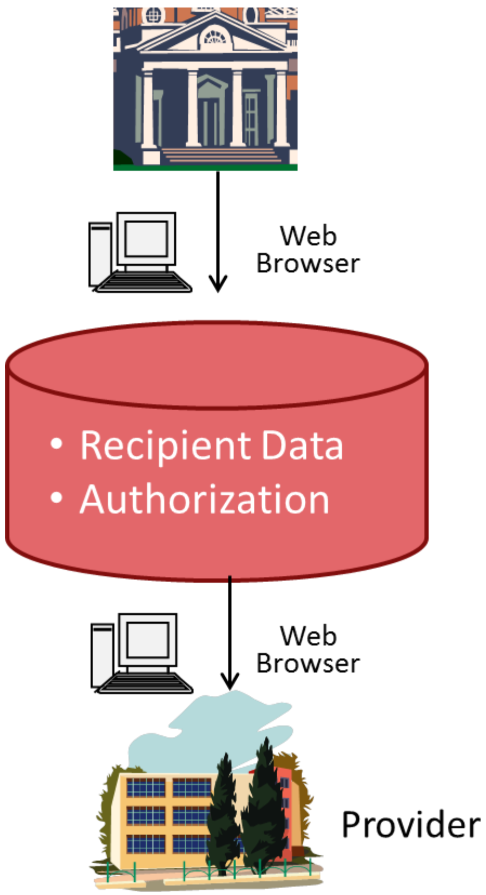
Electronic Visit Verification (EVV) Provider Training Client Module

Agenda

- Locating Clients
- Using Client Search Functions
- Client Record Navigation
- Payor & Authorization Details
- Adding Exclusions & Attributes

Notification of a New Client

- Provider Agencies will be notified by DMHAS when they are assigned a new client.
- Client and authorization information needed to schedule services are provided via the MMIS system.

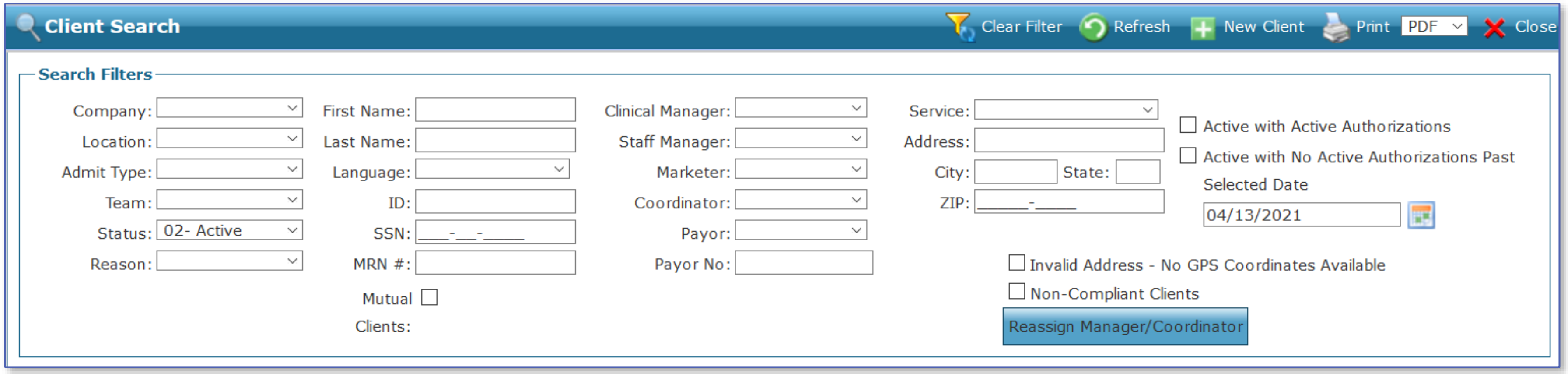


Client Search Screen

Clicking the Client module from the menu bar opens a *Client Search* screen.

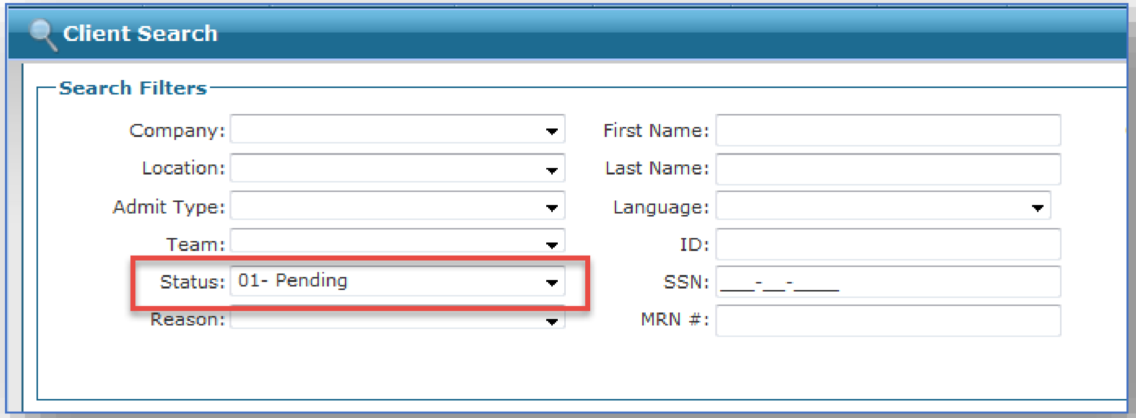
Key Search Filters include:

- Name
- Coordinator
- Location (branch office)
- Admit Type



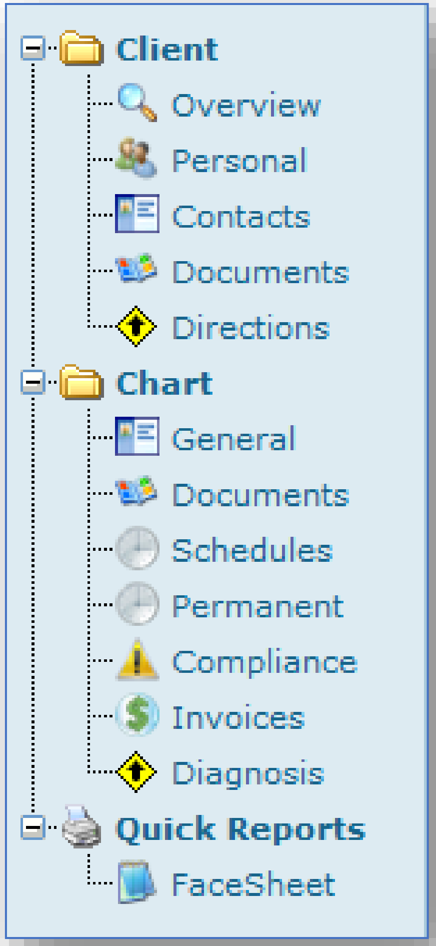
Locating New Client

- New clients appear with a status of **01- Pending**.
- New clients are assigned a unique internal Santrax Client ID, used in certain call scenarios. This ID is found on the *Client Address* report.
- Best Practice: Search regularly for client(s) with a Pending status.
- New clients need to be activated.



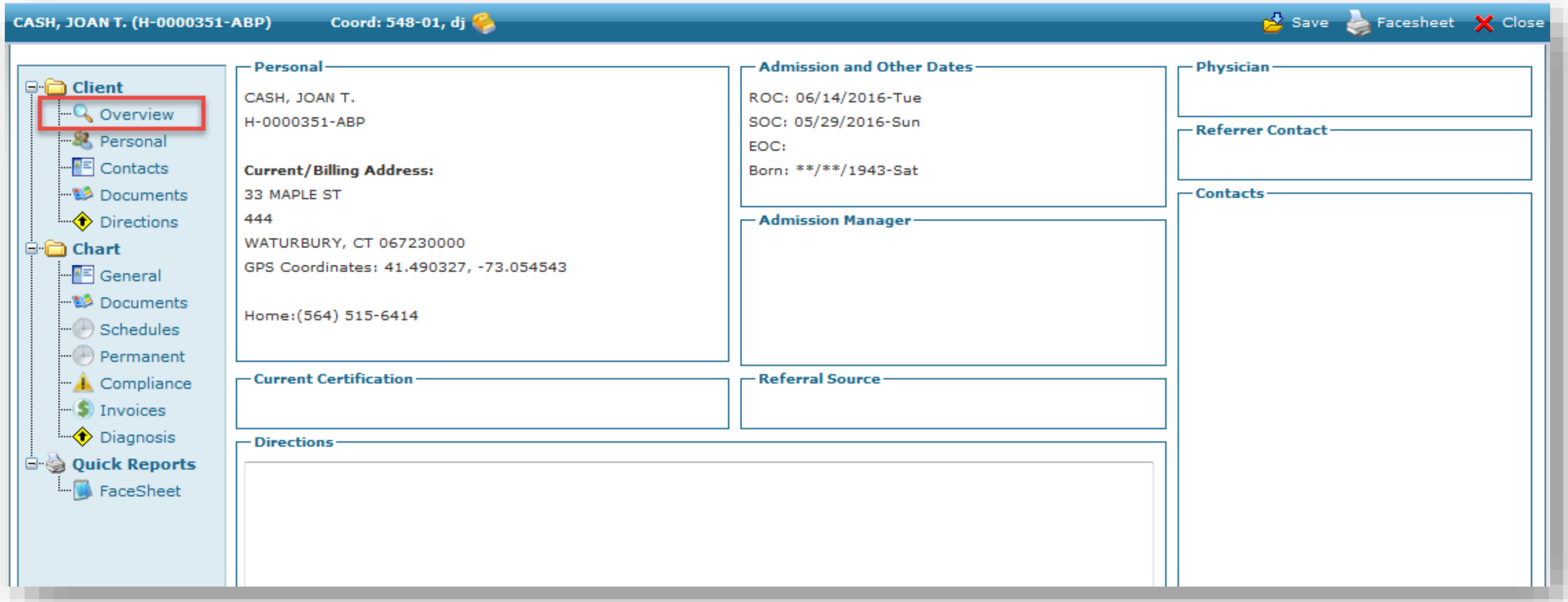
Client Record Navigation

- The Electronic Health Record (EHR) organizes information into folders for easy navigation
- The Client folder contains personal and demographic information
- The Chart folder contains information relating to the payer, services, authorizations, diagnosis, etc.



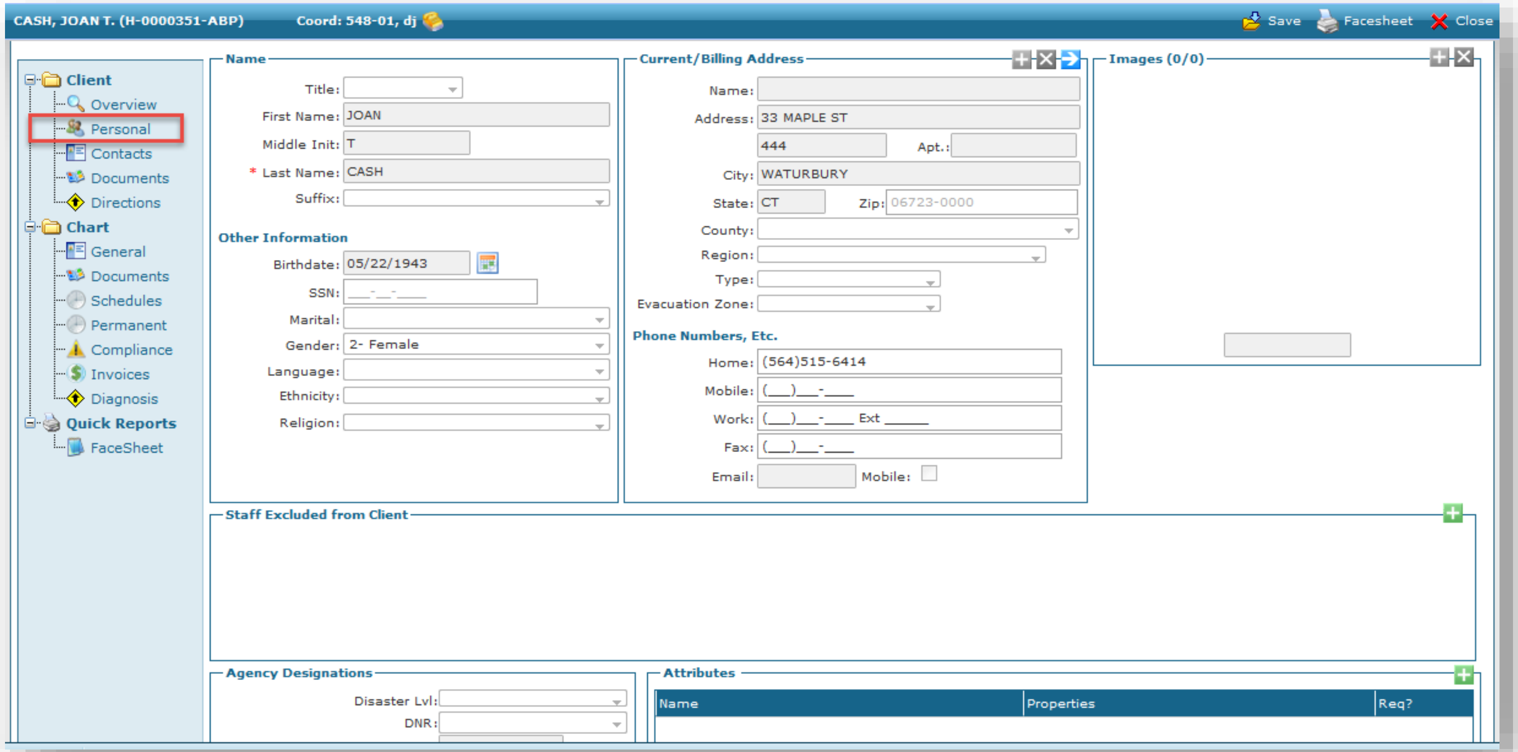
Client Folder > Overview Screen

The Overview screen provides a summary of information from other screens in the client record.



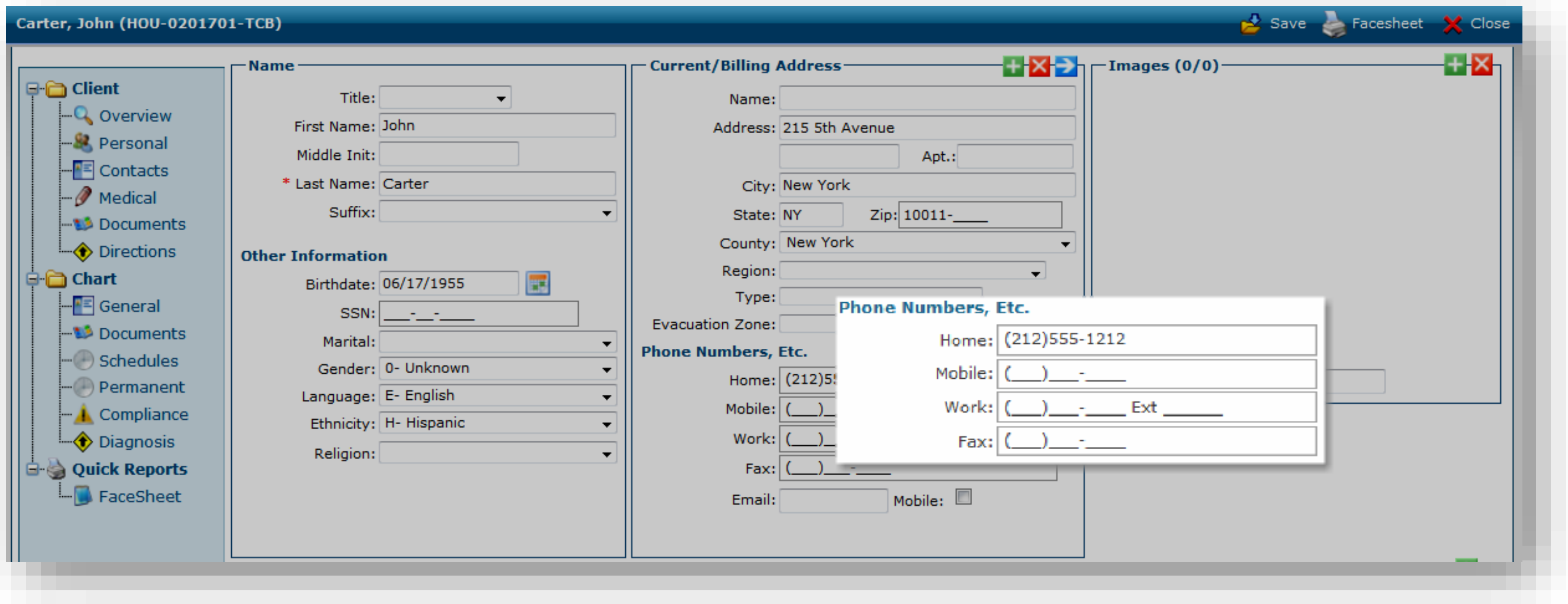
Client Folder > Personal Screen

- Information in the **Personal** screen is a combination of read-only and editable fields. Fields populated by data feed are greyed-out.



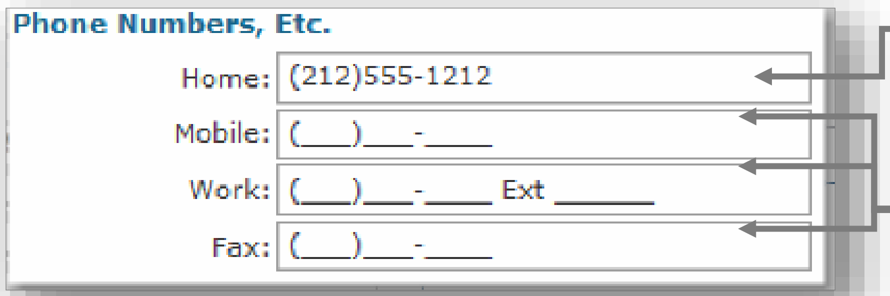
Client Folder > Personal Screen

- Verify the client info and validate the Home phone number
  - A maximum of three additional phone numbers can be entered for use with EVV calling.



Client Folder > Personal Screen

- Updating client phone numbers (agency updates)
  - The Home phone number is populated by the data feed from DMHAS/Gainwell.
    - Corrections to a client's home telephone number must be requested by contacting:
      - Ann Marie Luongo, Advanced Behavioral Health
      - 860-704-6211 or aluongo@abhct.com
  - The Mobile, Work & Fax numbers are available for the agency to add other phone numbers they may have for the client.
  - These phone numbers will not be overwritten by the data feeds.
  - All phone number fields are evaluated by the EVV system.



Delivered by DMHAS/Gainwell data feed

Agency phone numbers for clients can be added here (will not be overwritten by DMHAS data).

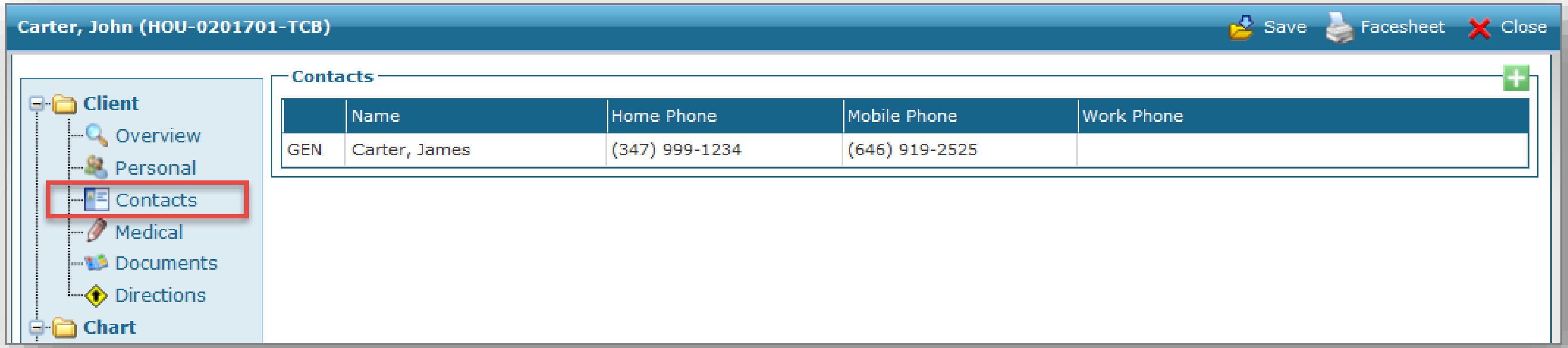
Client Folder > Contacts Screen

Multiple contacts can be entered for each client.

- Contacts can be family members, pharmacists, clergy etc.

Double-click one of the contacts listed to display the contact's information.

Click the green plus sign (+) to add new contacts.



Client Folder > Directions Screen

Built in Google Maps functionality

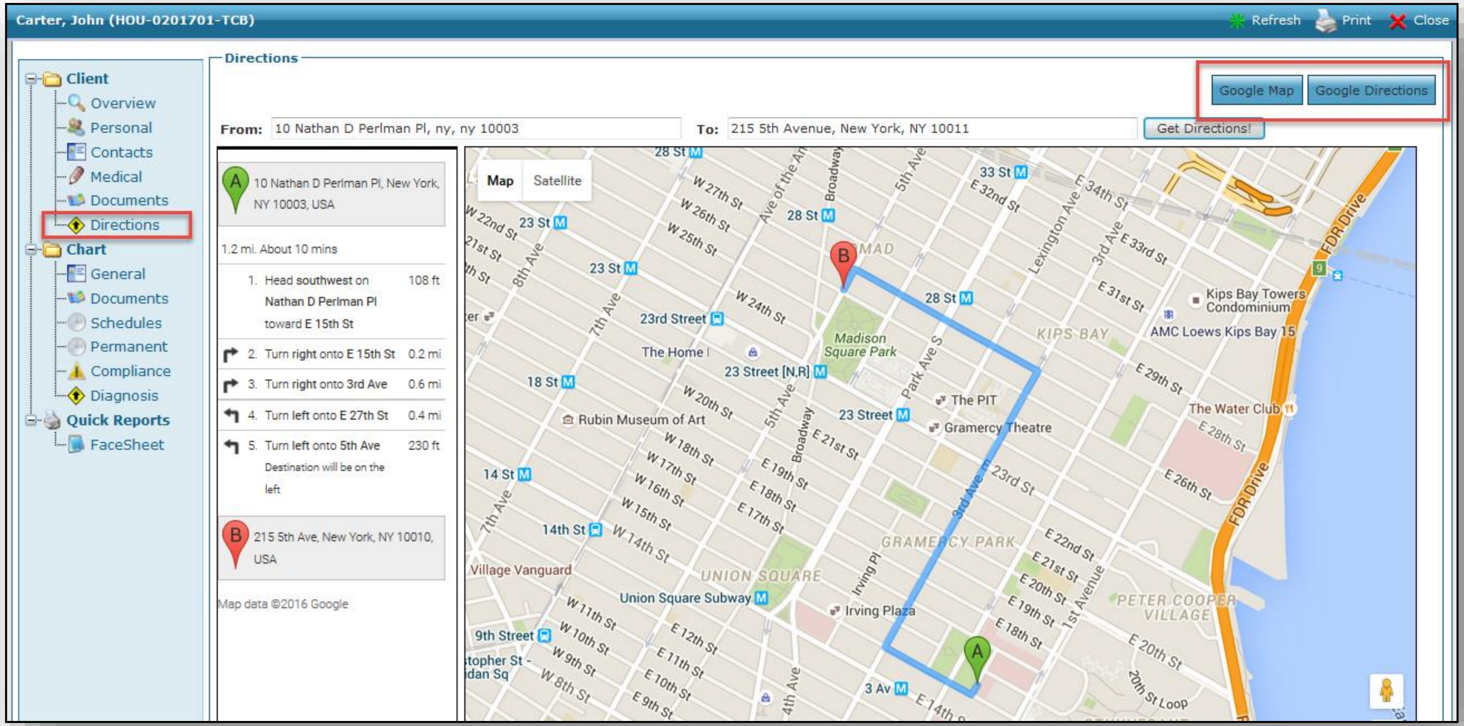


Chart Folder > General Screen

The General screen contains admission details including:

- Approved Services
- Admission Status
- Payer and authorization information

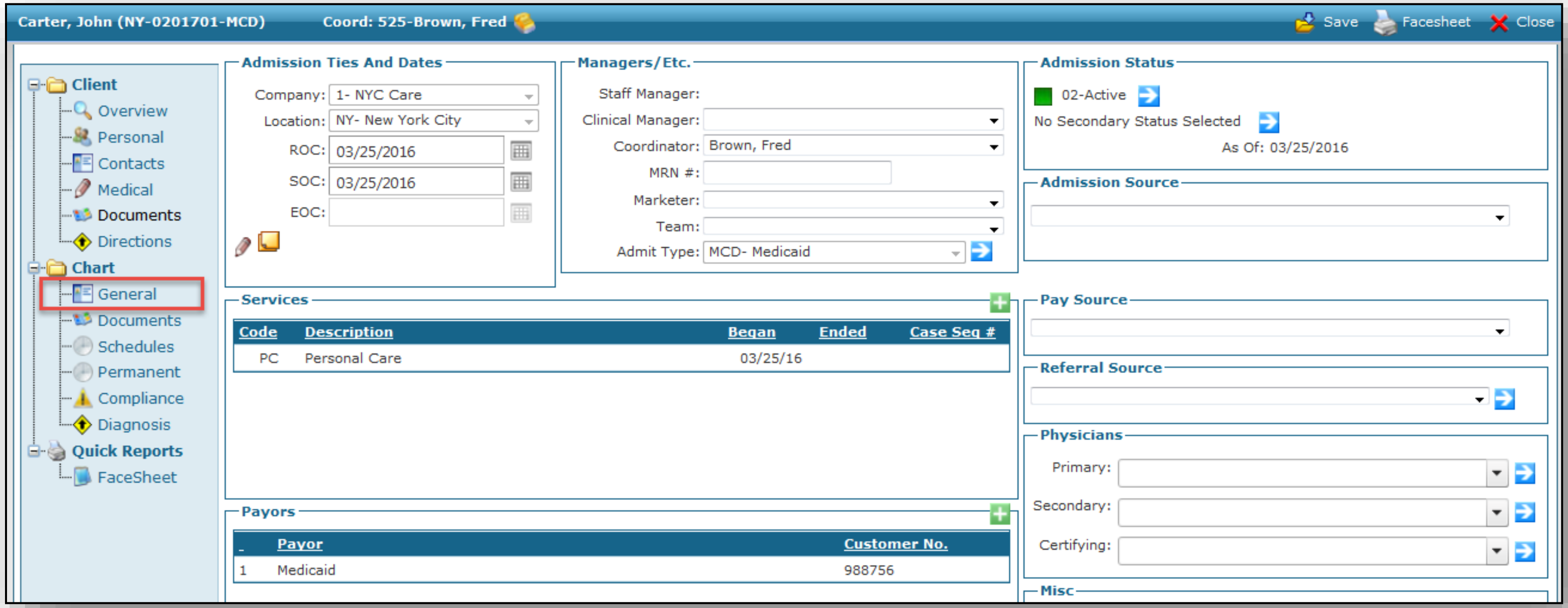


Chart Folder > General Screen

Activating New Clients

1. New clients can be found by running a search with the **Status** filtered for **'Pending'** on the *Client Search* screen.
2. Open the client's record and go to the *Admission Status* section of the **General** screen.
3. Click the blue arrow next to the admission status.
4. Confirm the status as **Active** and set the *Start of Care* date.
5. Click **Save** in upper right corner.

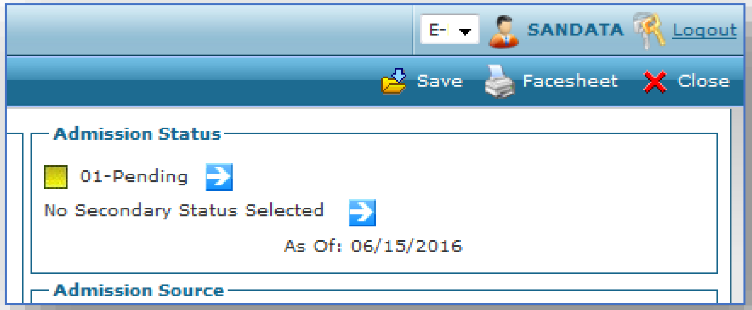


Chart Folder > General Screen

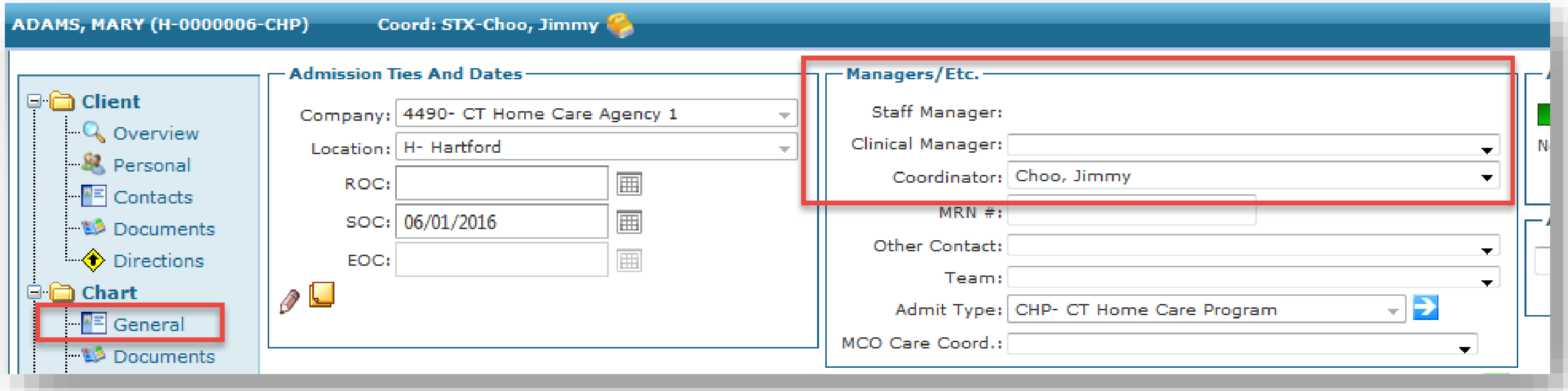
Admission Ties and Dates

- Located in the top left section of the General screen
- Can access Historian and Notes
- Displays the Company, Location to which the client has been assigned, plus the ROC, SOC and EOC
  - Referral of Care
  - Start of Care
  - End of Care

Chart Folder > General Screen

Manager/Etc.

Coordinators can be assigned to each client to allow for additional report filtering.



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Client Folder > General Screen

- Adding Agency-specific client identifiers
  - The EVV system uses the client's Medicaid ID as their primary ID.
  - If your agency has an additional agency-specific ID for the client which you wish to receive back in the 835, that ID needs to be added to the client record as their 'MRN' number.
  - This data point is then included in the 837 submission and returned in the 835 back to the agency.

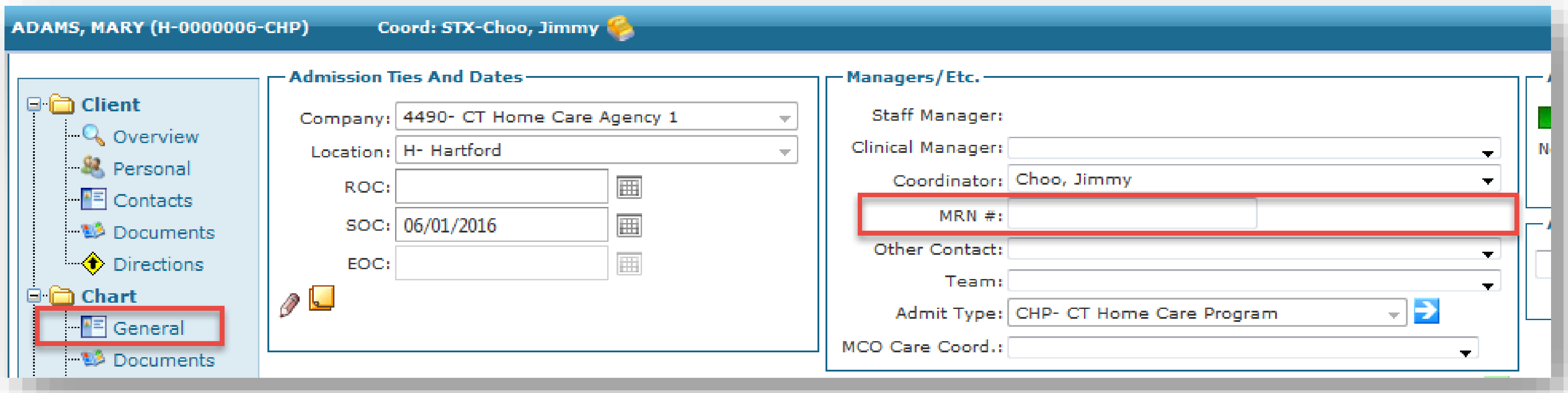


Chart Folder > General Screen

Santrax

Confirm that the **Enable Santrax** box is checked. Check the box and **Save** the record if that box is not checked.

Effective date is not required.

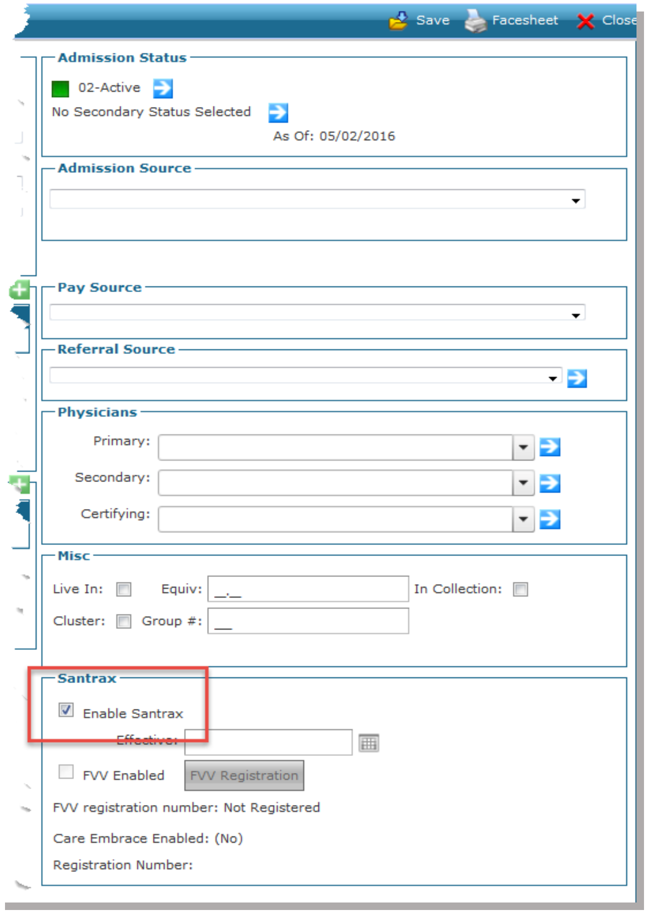


Chart Folder > General Screen

Live- In

For 24 hour live-in clients, check the *Live-In* box and enter the equivalent pay hrs.

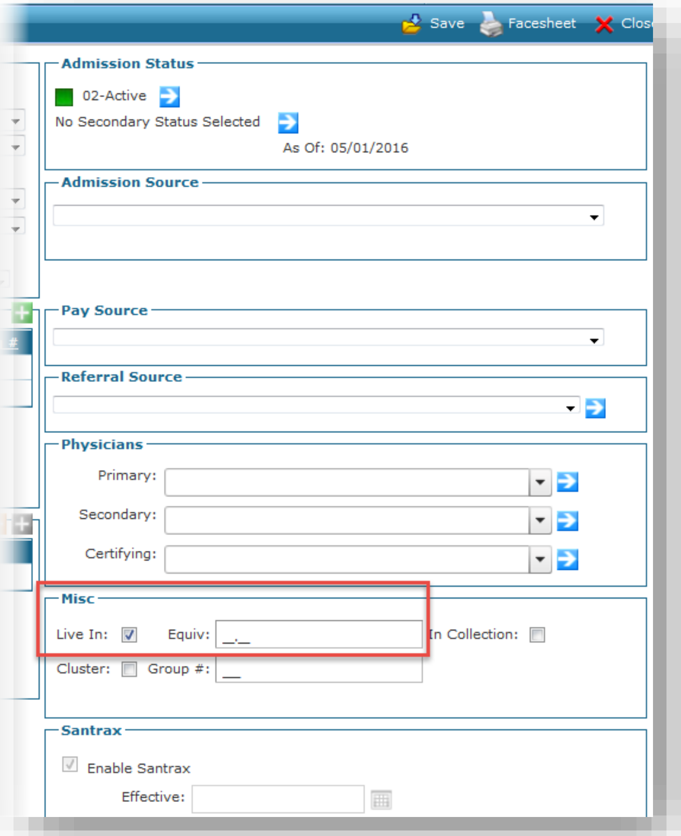


Chart Folder > General Screen

Payors and Authorizations

- Authorizations are accessed via the **Authorization** panel on the **General** screen.
  - Double-click the Authorization line to open the details

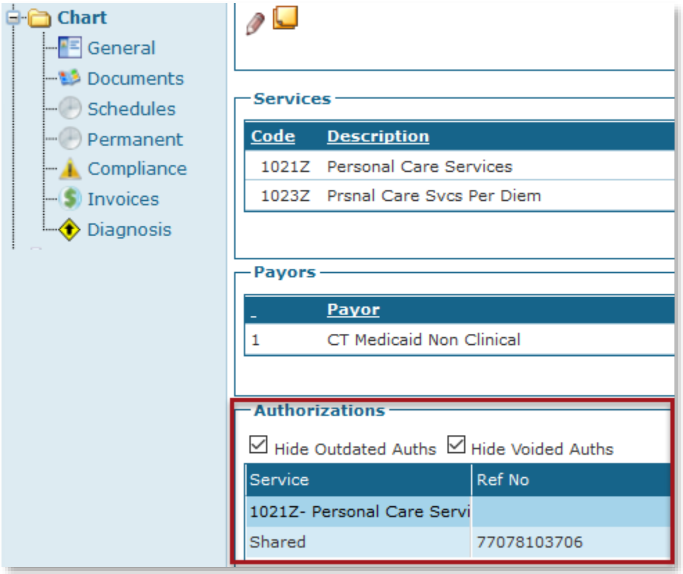


Chart Folder > Viewing an Authorization

- An authorization specifies limits established by the payer on the services a client may receive:
  - Service: type of visits
  - Date Range: of visits
  - Limitations: Maximum number of encounters per day/week/month

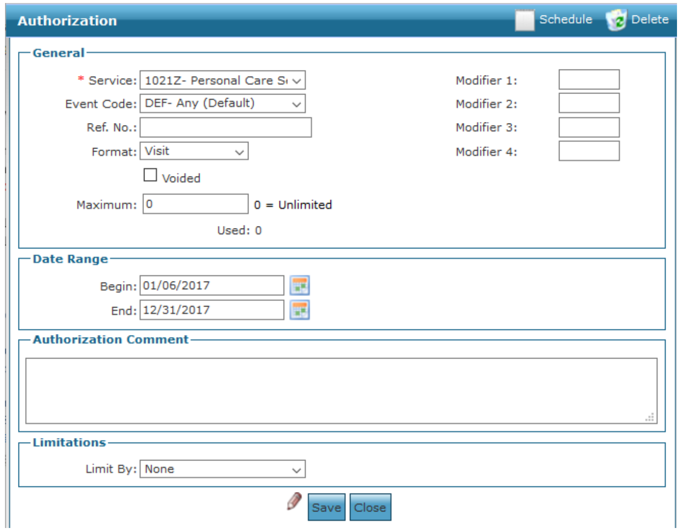


Chart Folder > Schedule Screen

- Client's scheduled visits
- Schedules can be filtered for a specified date range
- Schedules can be edited from this screen by double-clicking on a schedule line to view the details

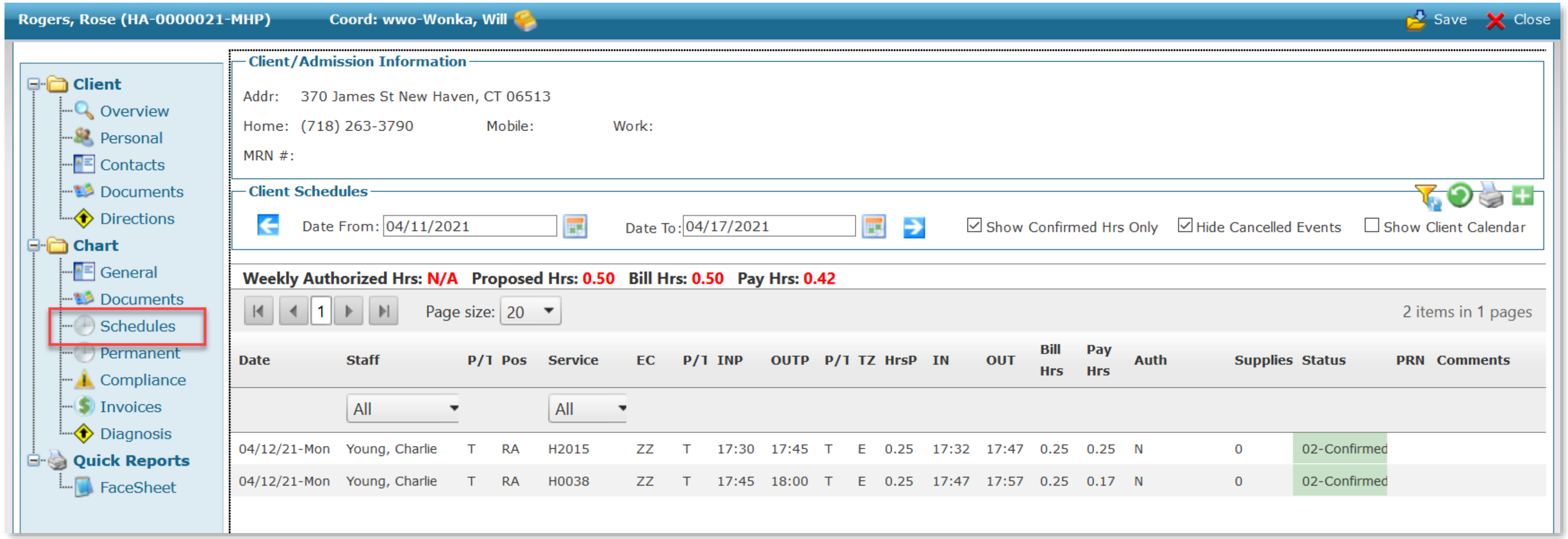
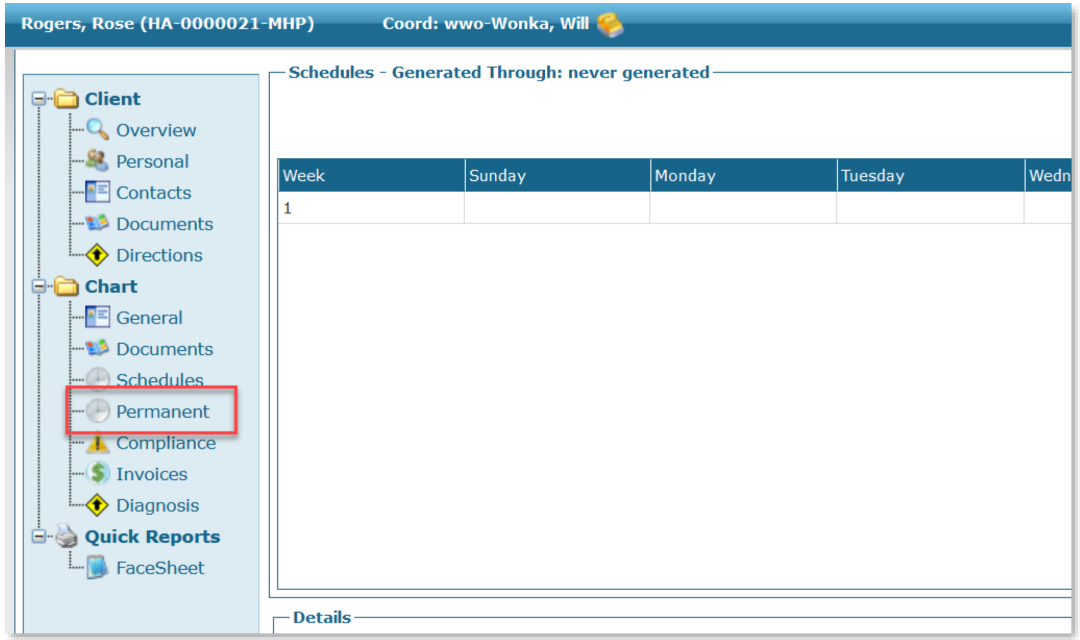


Chart Folder > Permanent Screen

Permanent Schedule Templates

- Allows you to create up to a 2 week pattern
- Allows for different caregivers and times
- Allows for creating alternating patterns



Exclusions & attributes

Introduction

Exclusions limit which clients are allowed to be assigned to a particular staff member. When exclusions are created in Santrax® Agency Management, users are warned or prevented from creating and editing a schedule that will conflict with the exclusions.

Exclusion Set-up: User Security

The ability to add and edit client exclusions depends on the assigned security group. The Security Group, 'Manage Attributes', is must be assigned to a user to allow access to Exclusions and Attributes by going to **Staff> Staff Profile > Security**.

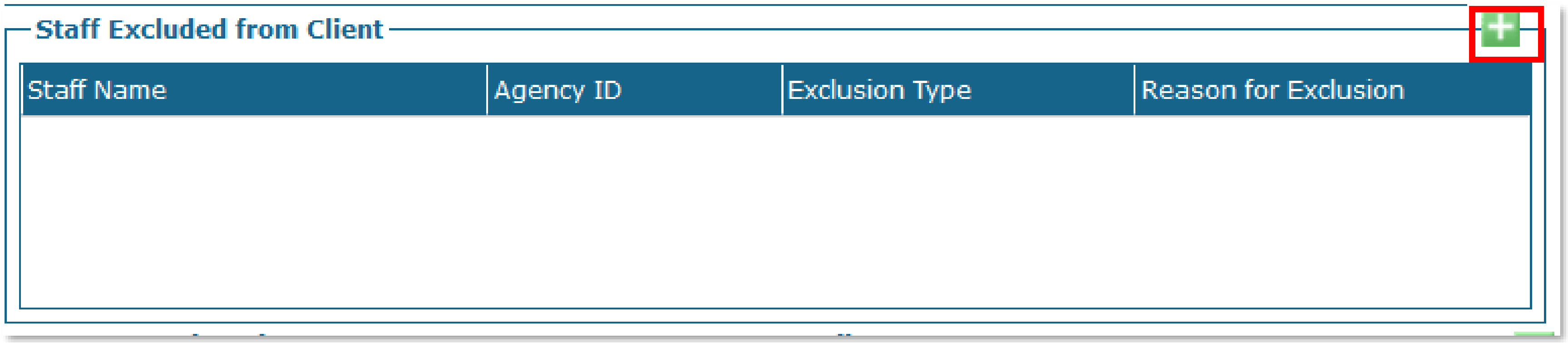
Security Groups

Total Security Groups: 12

Name	Description
Billing	Responsible for billing functions
Clinical Staff	Staff who will use the clinical functions of the system
HR	Works with agency staff screens, onboarding, compliance
JV-User	Areas in a Provider instance that a Jurisdictional User will have access to.
Manage Attributes	Manage Attributes and Exclusions
Merge Clients	
Scheduling	Agency staff responsible for scheduling
Scheduling Override	Advanced Scheduling Features
System Administration Oversight	Works alerts, visit dashboard, security assignment. Assigned to SA users responsible for oversight.
Temporary Client	Temporary Client
TPL Functionality	Responsible for assigning TPL payors
Visit Maintenance Read Only	Reviews alerts, read only access

Adding Exclusions

1. From the Personal screen in the client's profile, click the green plus sign to enter a staff member to be flagged as excluded from this client.

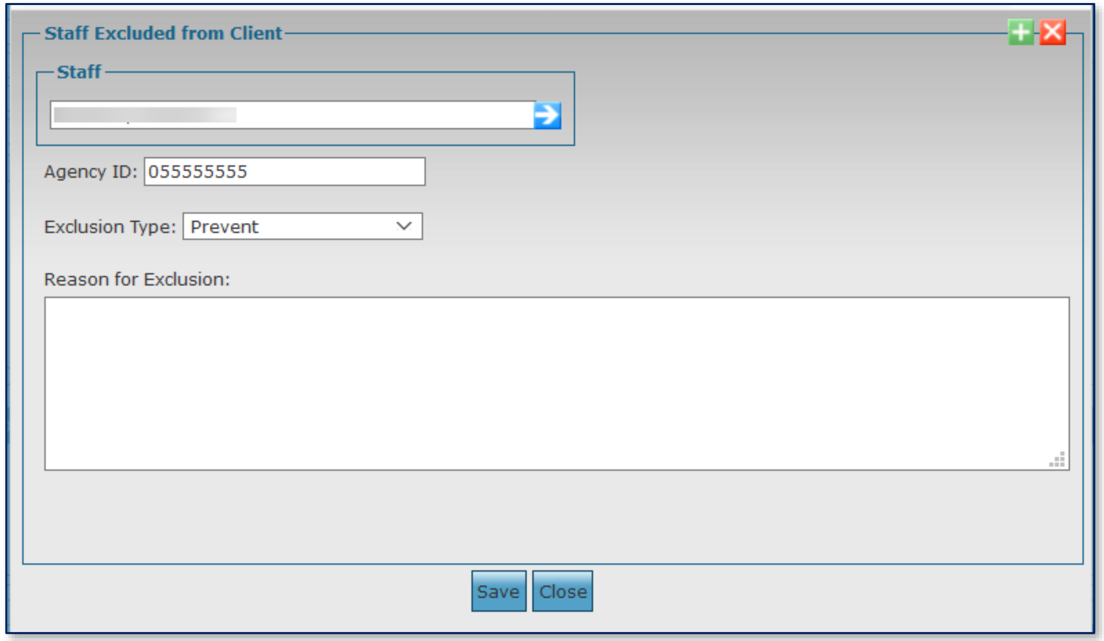


Adding Exclusions (cont'd)

2. Enter the Staff member's name by clicking the blue arrow. Use the **Staff Search** filter to select a staff member. If the staff has an **Agency ID** the ID displays.
3. Enter the **Exclusion Type** (**Prevent/Warn**) and the **Reason for Exclusion**
   - **Prevent** – when scheduling, a message appears informing the user a schedule cannot be created using the client and staff combination
   - **Warn** – when scheduling, a warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user can choose to override the warning message or choose another staff member.

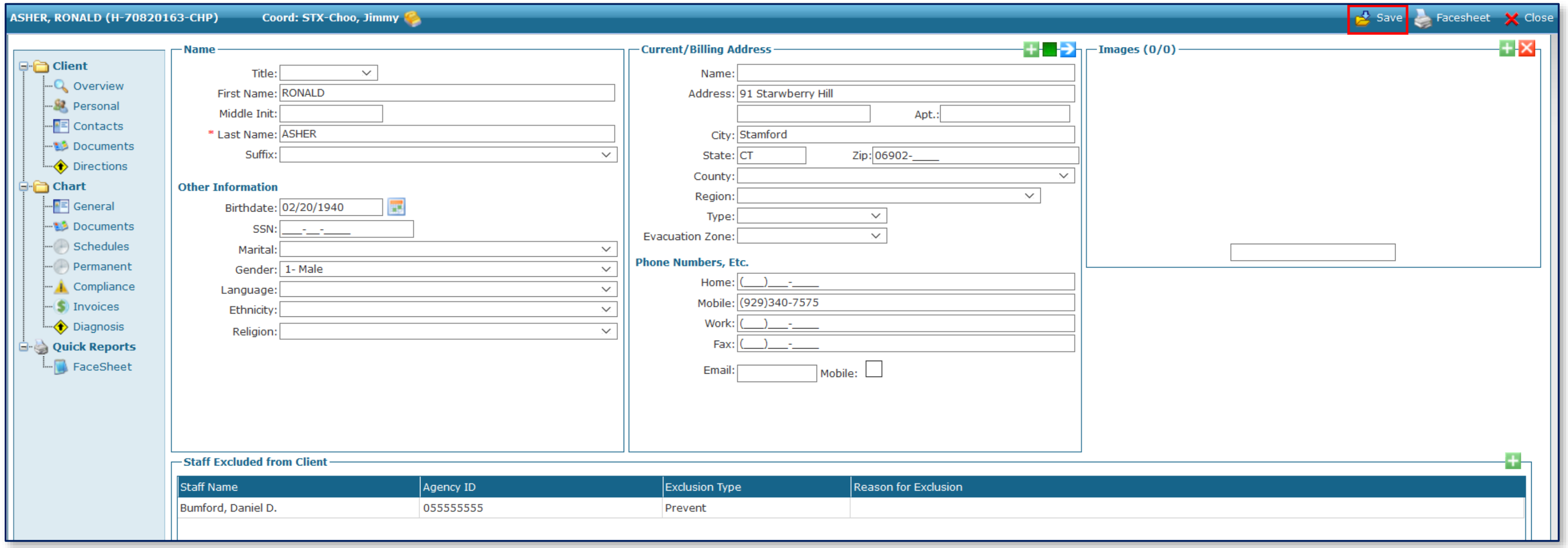
Adding Exclusions (cont'd)

4. Click **Save**.



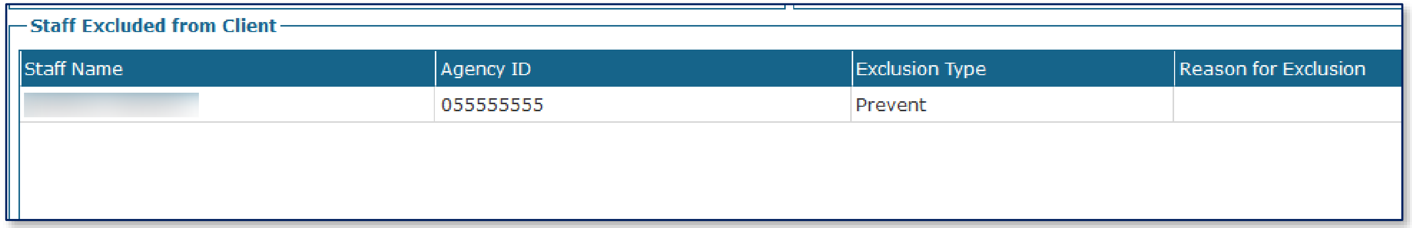
Adding Exclusions (cont'd)

5. Click **Save** at the *Personal* screen of the client's EHR.

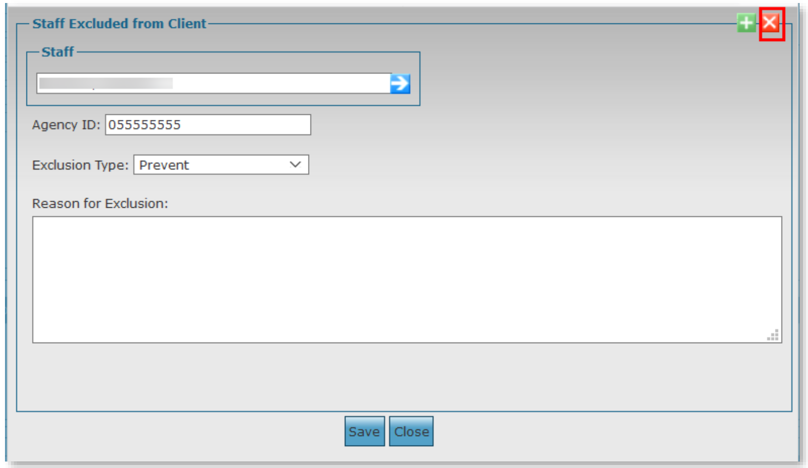


Deleting Exclusions

1. Double click an Exclusion to open the *Staff Excluded from Client* screen

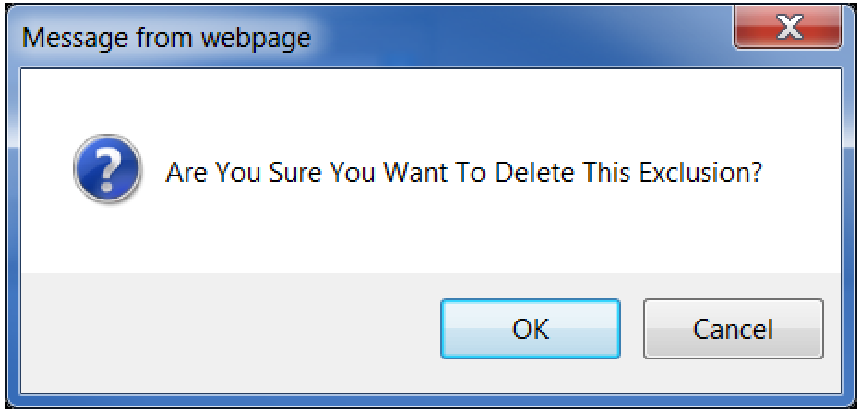


2. Click **Delete**.



Deleting Exclusions (cont'd)

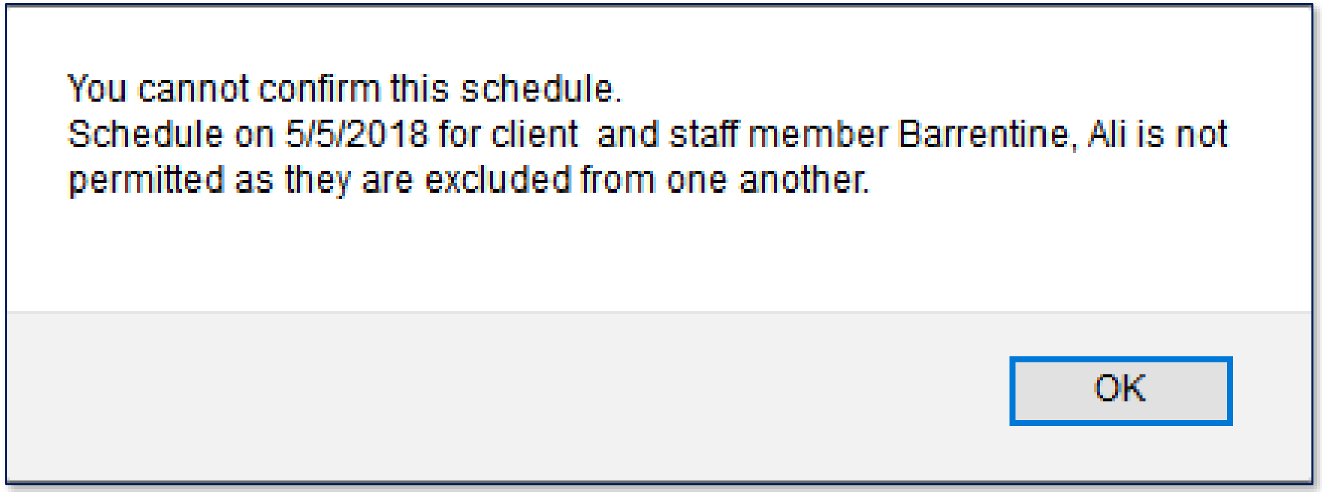
3. Click **OK**.



Scheduling with Exclusions

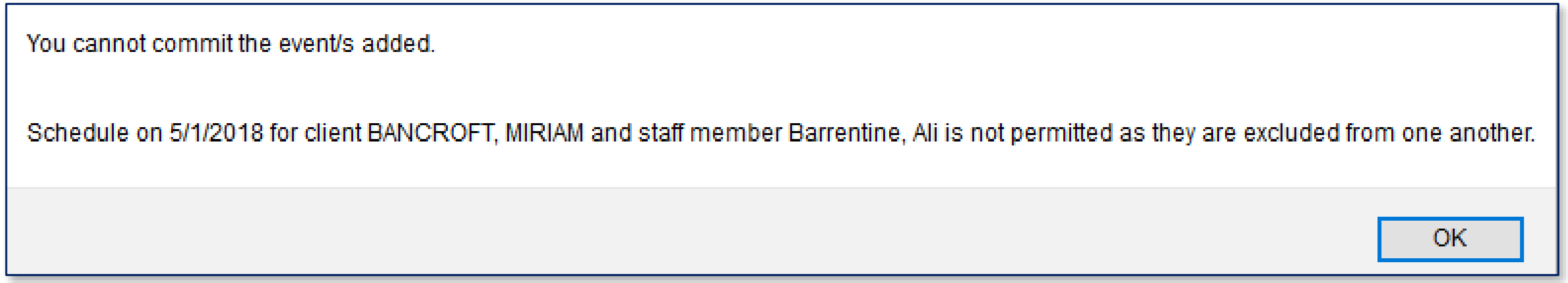
When '*Prevent*' is set on an exclusion, the following messages appear if a user attempts to save or commit a schedule with a client and staff member that are excluded from each other. This also applies when a staff member is excluded from a client's payor.

- Saving from the Schedule Detail screen:



Scheduling with Exclusions (cont'd)

- Committing from the *New Events* screen:

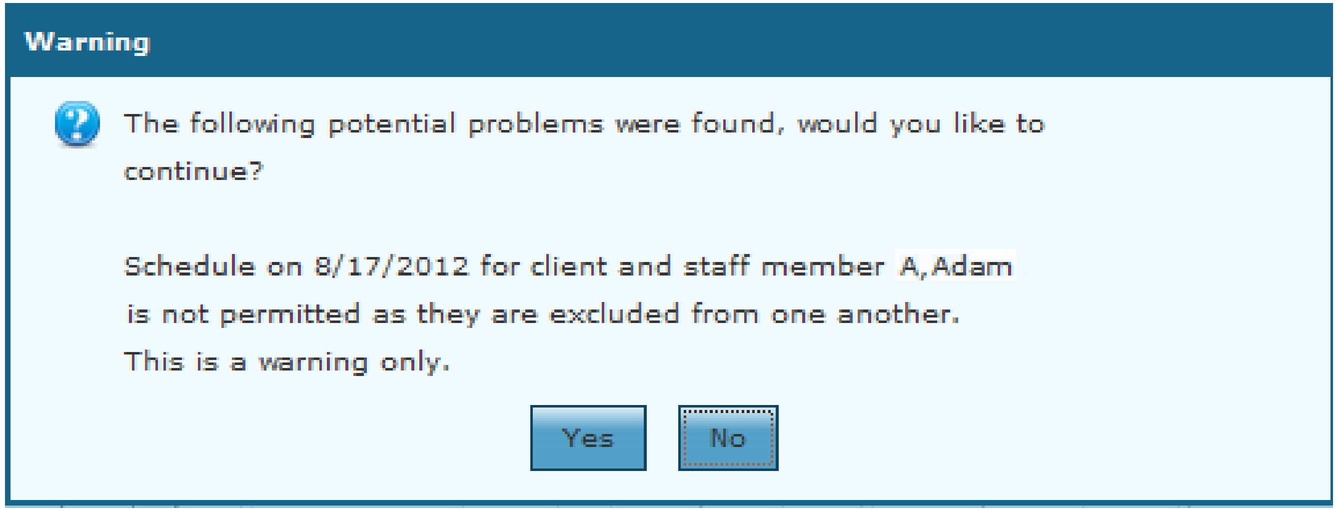


When '*Warn*' is set on an exclusion, the following warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user has the option of confirming the schedule.

Scheduling with Exclusions (cont'd)

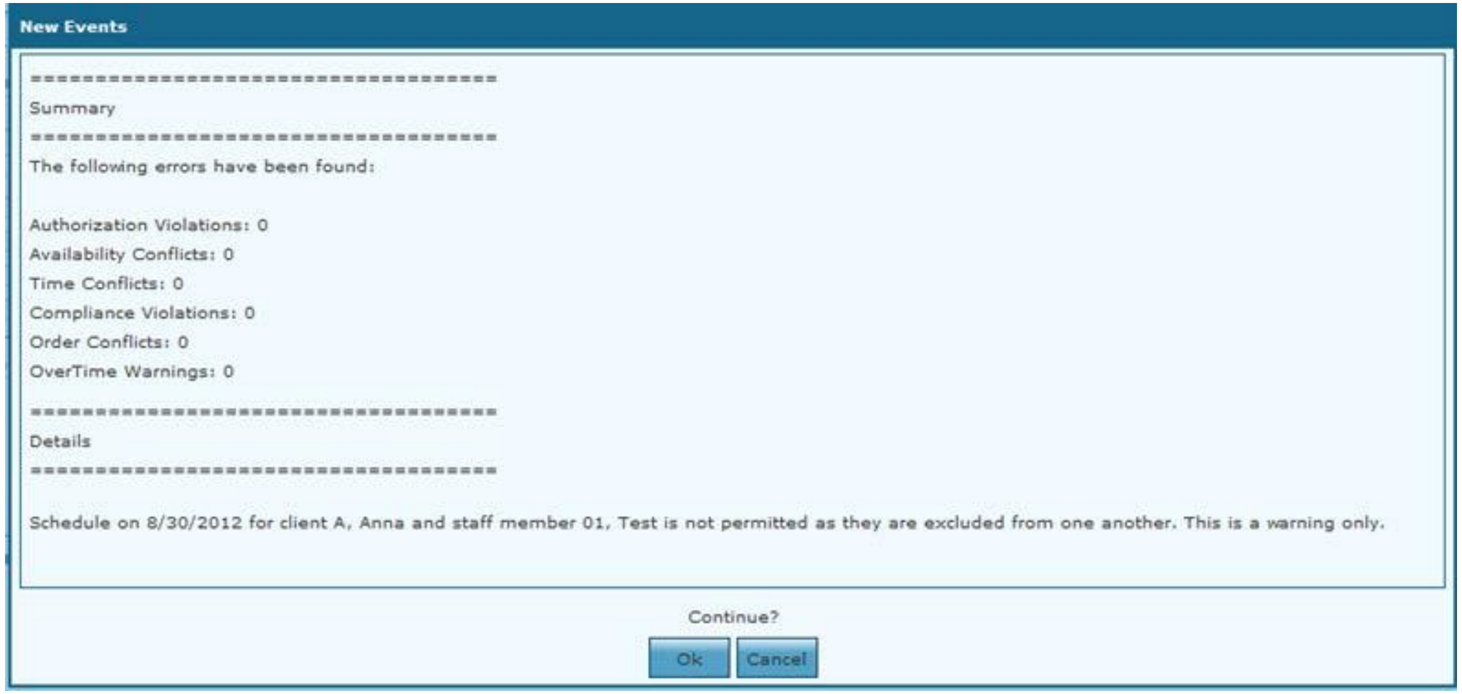
When '*Warn*' is set on an exclusion, the following warning appears if a user attempts to confirm or commit a schedule with a client and staff member that are excluded from one another. The user has the option of confirming the schedule.

- Confirming from the *Schedule Detail* screen



Scheduling with Exclusions (cont’d)

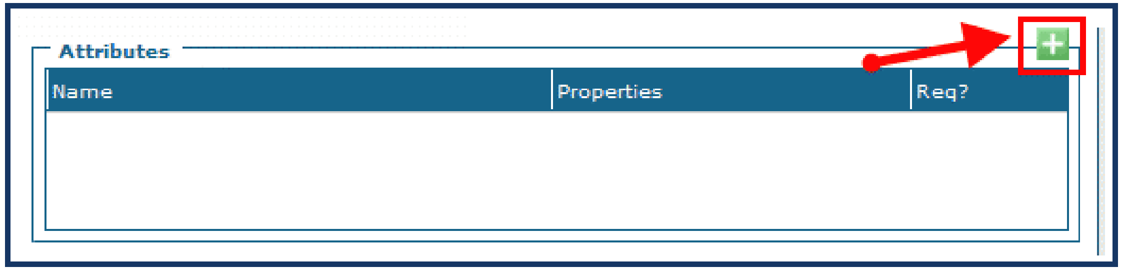
- Committing from the *New Events* screen



Adding Attributes

To assign attributes, from the *Personal* section of the client's EHR, locate the *Attributes* section of the screen and complete the following steps.

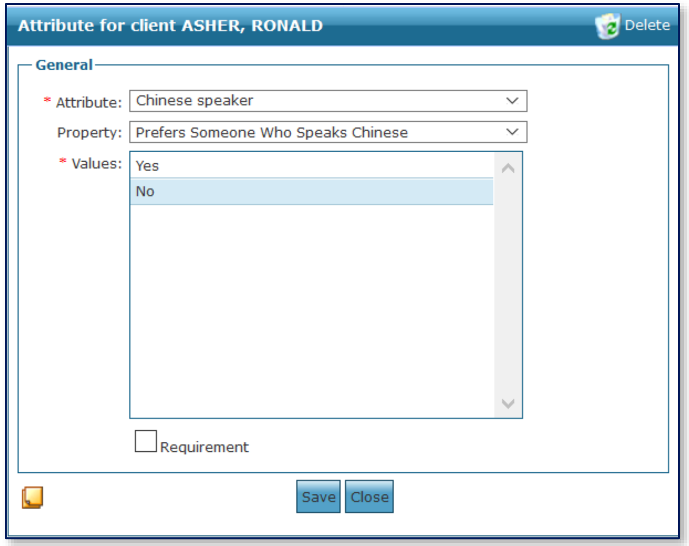
1. Click **Add** ( ).



2. Select the **Attribute**.
3. Select the **Property**.

Adding Attributes (cont'd)

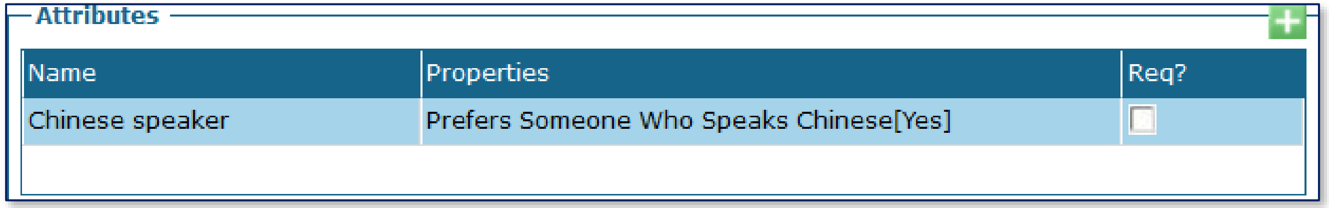
4. Select the **Values**.
5. Multi-Select using the <Ctrl> or <Shift> key.
6. Select the Requirement checkbox, if applicable (selecting **Requirement** indicates the attribute must be met/satisfied).
7. Click **Save**.



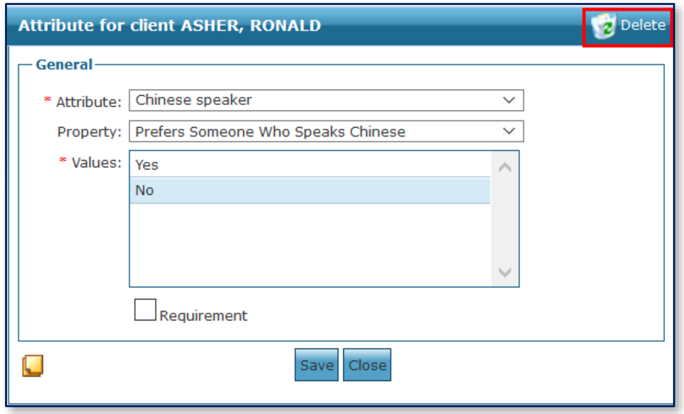
Deleting Attributes

To delete a Client Attribute

1. Double click an Attribute to open the *Attribute for Client* screen.



2. Click **Delete**.



Deleting Attributes (cont’d)

3. Click **Yes** to confirm the deletion.

4. Click **Save**.

DEMONSTRATION

- Client Search
- Activating Clients
- Client Electronic Health Record
- Viewing Authorizations
- Adding Exclusions & Attributes

What You Have Learned

- Notification of a new client:
  - Access Agency will notify provider agencies when they are assigned a new client.
  - Client and Authorization will be sent to Sandata Payor Management (SPM) via a data feed.
  - Verifying pre-populated client information.
- Accessing the Client module and utilizing the search filters.
- Locating new clients.
- Activating new clients; changing status from Imported to Active.
- Accessing and viewing Payers and Authorizations.

Questions...