

The background features a hand in a white lab coat pointing at a futuristic digital interface. The interface consists of various icons and data visualizations, including a large circular gauge, a gear, a first aid kit, a person icon, a syringe, a magnifying glass, a pill, and a network diagram. The overall theme is healthcare and data technology.

Sandata

Get more right from the start

Connecticut Department of Mental Health and
Addiction Services

Electronic Visit Verification (EVV) Provider Training
Reports Module

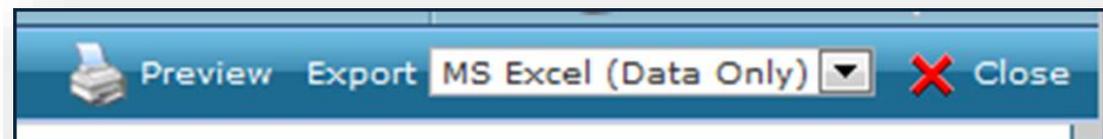
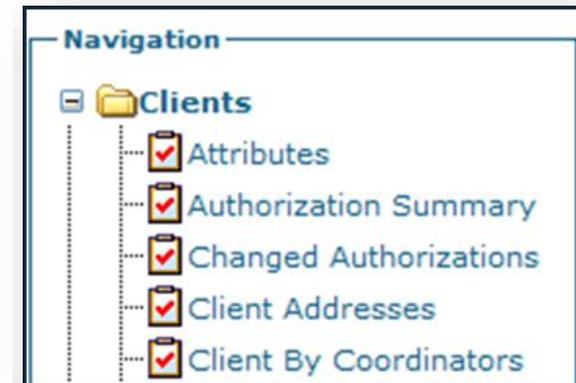


Agenda

- How to Run a Report
- Useful Reports

How to Run a Report

1. Click **Reports** from the menu bar.
2. From the Navigation panel, expand the report category and select a report
3. Edit Report Filters
Each report has its own filters and sort options.
4. View Report
Click **Preview** to view a PDF version.
Or, choose an export format and click **Export**.



Useful Reports

Clients → Expiring Authorizations

- ▶ Shows all authorizations expiring within a given date range.

Clients → Client Addresses

Scheduling → Calendar by Client

- ▶ Individual Schedule Calendars by Client

Scheduling → Calendar by Staff

- ▶ Individual Schedule Calendars for each caregiver.



Sample Report – Client Addresses

| Client Addresses | | | | | | |
|------------------------------|-------------|--------------|----------------|---------|--|--------|
| Client Status = '02- Active' | | | | | | |
| Name | ChartID | Stx ClientID | Phone | SOC | Address | County |
| ASHER, RONALD | H000013-CHP | 0013 | (860) 366-0013 | 6/1/16 | 91 Starberry Hill, Stamford, CT 06902 | |
| AUGUST, JOSEPH | H000008-CHP | 0008 | (860) 366-0008 | 6/1/16 | 32 Rachelle Ave, Stamford, CT 06905 | |
| BANCROFT, MIRIAM | H000010-CHP | 0010 | (860) 366-0010 | 6/1/16 | 28 Pinnacle Rock Rd, Stamford, CT 06903 | |
| BAROSA, MARIA | H000011-CHP | 0011 | (860) 366-0011 | 6/1/16 | 445 Hope St, Stamford, CT 06906 | |
| BARTON, MARGARET | H000012-CHP | 0012 | (781) 371-1488 | 6/1/16 | 202 Soundview Ave, Stamford, CT 06902 | |
| BASKIN, MARY | H000014-CHP | 0014 | (860) 366-0014 | 6/1/16 | 37 Nelson Street, Stamford, CT 06902 | |
| BELL, BEATRICE | H000015-CHP | 0015 | (860) 366-0015 | 6/1/16 | 80 E Ridge Road, Stamford, CT 06903 | |
| BIRD, RICHARD | H000022-CHP | 0022 | (781) 371-1488 | 6/1/16 | 247 Chestnut Hill Road, Stamford, CT 06903 | |
| BORDEN, PAUL | H000038-CHI | 0038 | (860) 366-0038 | 6/1/16 | 177 Pequot Ave, New London, CT 06320 | |
| BROCCO, RITA | H000020-CHP | 0020 | (860) 366-0020 | 6/1/16 | 40 Woodbury Ave, Stamford, CT 06907 | |
| CAMPBELL, ALYSSA | H000024-CHP | 0024 | (860) 366-0024 | 6/1/16 | 17 Denote Place, Stamford, CT 06907 | |
| CARSON, MARIE | H000023-CHP | 0023 | (860) 366-0023 | 6/1/16 | 22 Robin street, Stamford, CT 06902 | |
| CARTER, RICHARD | H000025-CHP | 0025 | (860) 366-0025 | 6/1/16 | 23 Locust Lane, Stamford, CT 06905 | |
| CLAYTON, AMANDA | H000032-CHP | 0032 | (781) 371-1488 | 6/1/16 | 33 Converse Place, New London, CT 06320 | |
| DOZARIO, FRANK | H000039-CHP | 0039 | (860) 366-0039 | 6/1/16 | 113 Cedar Grove Ave, New London, CT 06320 | |
| HOLLAND, MARK | H000047-CHP | 0047 | (781) 371-1488 | 6/1/16 | 687 Broadview Terrace, Hartford, CT 06106 | |
| JIMENEZ, STEPHANIE | H000049-CHI | 0049 | (781) 371-1488 | 12/1/16 | 58 Sterling Street, Hartford, CT 06112 | |

Total: 17



Sample Report – Expiring Authorizations

Expiring Authorizations By Payor

Client Status = '02- Active', From 07/01/2021 To 08/07/2021 11:59 PM, Authorization Required = 'True'

| Client | Chart ID | SOC | Primary Insurance ID | Prior Auth End Date | Service ID | Event ID | Ref Num |
|---------------------------------------|---------------|-----------|----------------------|---------------------|------------|----------|---------|
| Payor: CT Mental Health Waiver | | | | | | | |
| Carter, Mary | HA0000017-MHP | 4/12/2021 | | 7/31/2021 | 1213M | DEF | |
| Rogers, Rose | HA0000021-MHP | 4/12/2021 | | 7/31/2021 | H0038 | DEF | |
| Rogers, Rose | HA0000021-MHP | 4/12/2021 | | 7/31/2021 | H2015 | DEF | |
| Sub Total: 3 | | | | | | | |
| Grand Total: 3 | | | | | | | |

Sample Report – Calendar by Staff/Client

Calendar By Staff As Of 4/13/2021 Moss, Donna
 Date From 04/04/2021 Date To 04/13/2021 April 2021
 Home:
 Work:
 Mobile/Cell:

| Sun | Mon | Tues | Wed | Thurs | Fri | Sat |
|-----|--|---|-----|-------|-----|-----|
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 01:00 PM-01:30 PM-1213M-Carter, Mary 05:00 PM-05:30 PM-H0038-Carter, Mary | 13 09:00 AM-09:30 AM-1213M-Carter, Mary | | | | |

| Client ID | Service | Client | Address | City, State | Phone |
|---------------|---------|--------------|----------------------|---------------------|----------------|
| HA0000017-MHP | 1213M | Carter, Mary | 26 Harbor Park Drive | Port Washington, NY | (917) 972-7973 |
| HA0000017-MHP | H0038 | Carter, Mary | 26 Harbor Park Drive | Port Washington, NY | (917) 972-7973 |

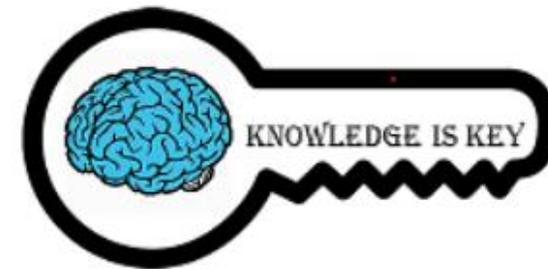


What You Have Learned

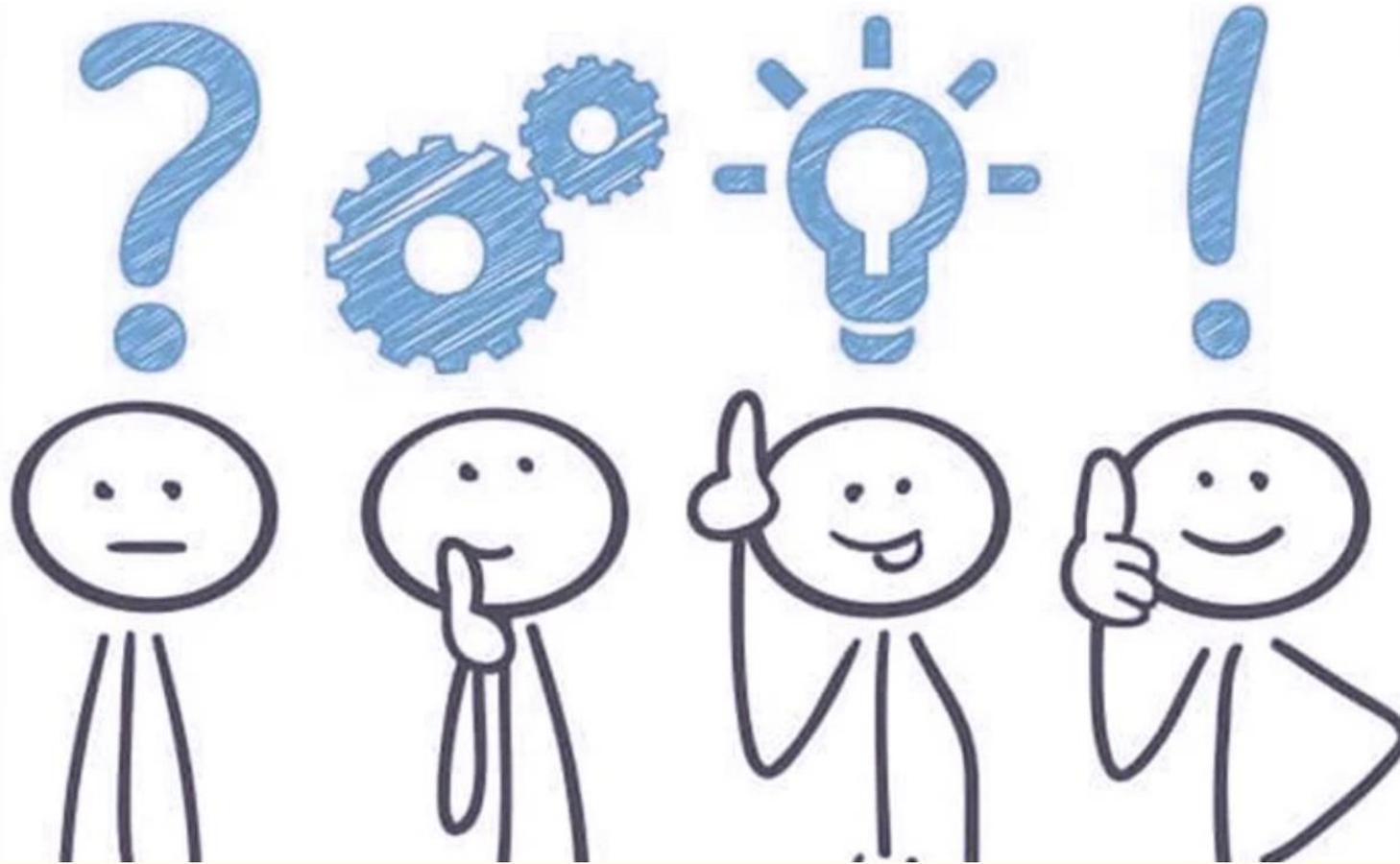
How to Access the Reports Tab and Run Reports

Useful Reports

- ▶ Calendar by Client
- ▶ Calendar by Staff
- ▶ Expiring Authorizations
- ▶ Client List with Last Scheduled Date



Questions



Next Steps

- ▶ If you are the EVV administrator for your agency, look for your agency's Welcome Kit containing account details which will be sent via email
 - Create additional agency users to access the system
 - Enter caregivers into your system
 - Prepare and train caregivers on the EVV visit capture processes (mobile and TVV)
 - Verify client data in your system including phone numbers
 - Create and maintain schedules for clients
 - Enter your usual and customary rates for each service

- ▶ Program Go Live Date: 05.03.2021



How to Stay Connected

Website

www.ctdssmap.com

Email

ctcustomer@sandata.com

Telephone

1-855-399-8050

