

Santrax[®] Payer Management

Electronic Visit Verification™ Solutions

*Increasing the Capacity to Care
Improving the Process of Delivering Care*

Electronic Visit Verification for Applied Self-Direction Program



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Agenda

- Introductions
- Establishing EVV Credibility
- What is Electronic Visit Verification?
- Sandata Self-Directed Care Suite
- Help at Home, LLC
- Concepts of Independence
- Questions

Establishing EVV Credibility

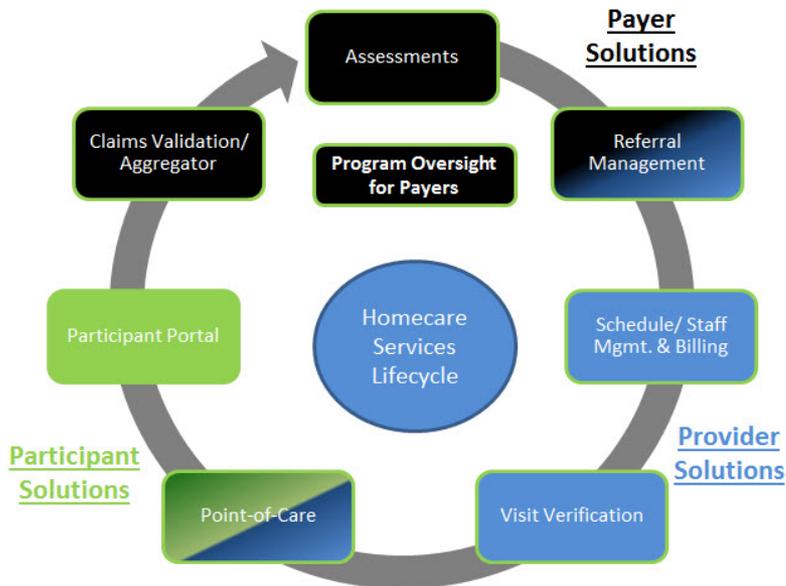
SOLUTIONS

INCREASING THE CAPACITY TO CARE BY...

- ✓ Optimizing the value of every visit
- ✓ Maximizing the efficiency of Providers
- ✓ Enabling collaboration between Payers and Providers

EXPERIENCE

- ✓ Focused on homecare technology for over 40 years
- ✓ Deployed EVV in 1994, held patent until 2010
- ✓ Experience with 9 state Medicaid Agencies and 8 MCOs
- ✓ Only vendor with experience with all 4 EVV models



SCALE

- ✓ 200+ employees dedicated to the Home Care market
- ✓ Mobile users: 60K+
- ✓ 90+ integration points with homecare vendors
- ✓ Customers in 45 states, Puerto Rico and Canada
- ✓ Daily reach of 200K+ homes
- ✓ 3K+ providers using Sandata to manage 500K+ patients

Electronic Visit Verification (EVV): What is it?

*Electronic Visit Verification is a **modular** technology solution that provides **transparency** into home and community based care delivery, supporting provider network optimization while **improving** the participant's quality of care.*



Electronic Visit Verification

When the worker arrives on site, they “check-in” using a variety of technologies (mobile, telephonic, device, etc.);

- When they leave, they “check-out” via the same means; and,
- System accurately captures visit start, stop, duration, and tasks performed.



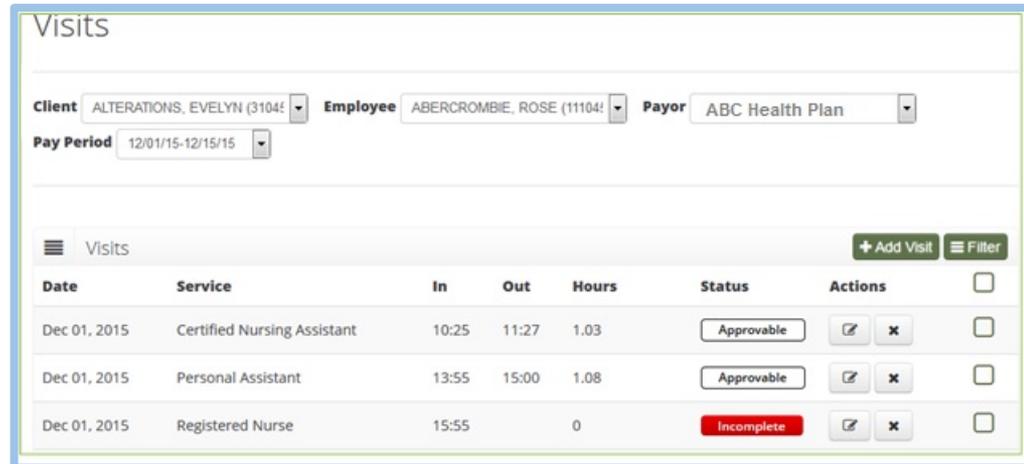
Mobile Visit Verification

- Mobile application loaded on a smart device
- Collects key visit information, e.g., Time, Location, Worker, and Participants IDs
- “Check-in” and “Check-out” - GPS confirmation
- Works in both connected and disconnected mode

Self- Directed Care Suite

The Santrax Self-Directed Solution includes:

- **Participant Portal** – web portal for participants or their authorized representative to view, edit and approve visits and electronic timesheets;
- **Electronic Visit Verification** – point of care technologies to record Cures Act required EVV data elements as well as visit tasks completed;
- **Employee/Caregiver Portal** – web portal for individual caregivers to view and edit their visits and view their electronic timesheets;
- **Fiscal Management Portal** – allows a Fiscal Agent to view and edit data across the entire program population; and,
- **Jurisdictional View** – web portal for Payer oversight and reporting of all EVV data.



The screenshot displays the 'Visits' interface. At the top, there are dropdown menus for 'Client' (ALTERATIONS, EVELYN (3104)), 'Employee' (ABERCROMBIE, ROSE (11104)), and 'Payor' (ABC Health Plan). Below these is a 'Pay Period' dropdown set to '12/01/15-12/15/15'. The main area features a table with columns: Date, Service, In, Out, Hours, Status, and Actions. There are also '+ Add Visit' and 'Filter' buttons. The table contains three rows of visit data.

Date	Service	In	Out	Hours	Status	Actions
Dec 01, 2015	Certified Nursing Assistant	10:25	11:27	1.03	Approvable	[Edit] [X] [Check]
Dec 01, 2015	Personal Assistant	13:55	15:00	1.08	Approvable	[Edit] [X] [Check]
Dec 01, 2015	Registered Nurse	15:55		0	Incomplete	[Edit] [X] [Check]

The Santrax Self-Directed Solution DOES NOT require:

- **Schedules** – allows a participant and caregiver flexible scheduling that is personal and dynamic
- **Location Comparison** – location of the start and end of visit is captured, but not compared
- **Location Tracking** – location is only captured at the start and end of a visit

Help at Home, LLC

Our History

- Help At Home, LLC, along with our sister company, Oxford HealthCare in Alabama and Mississippi, has been providing compassionate, dependable alternatives to nursing home placement for over 35 years.
- Our name says it all about who we are and what we do.
- Since 1975, we have provided thousands of people with an option other than a nursing home - their own home.
- Our committed and well-trained staff has made it possible to keep people in their homes and communities, where they want to be.

Our Staff

- We are fully insured and bonded, and all of our staff is completely trained, tested, background-checked, and closely monitored by our staffing supervisors.
- Our training program is very comprehensive. As a matter of fact, our training program has even been used as a model for other home care associations!
- All of our employees receive continuous training throughout the year to keep their skills and knowledge sharp
- Our intense commitment to quality service and training has allowed us to work with many federal and state funded home care programs.

Our Commitment to Quality

- We operate 146 branch locations, providing services in 13 states. Our size allows us to have buying power and a voice in the industry, which benefits and protects our clients' rights to quality and services.
- Even though our operations are large in size, each office is managed at the local level, with direct supervision by our corporate staff to maintain our strictly enforced standards for quality service.
- With our locally assigned and highly committed management and supervisory teams in each office, we are able to provide the type of personal service that has made us a leader in our industry!



Help at Home, LLC

Our Mission Statement

- The mission of Help At Home, LLC/Oxford HealthCare is to benefit and enhance the lives of the elderly and disabled, and their families, by providing care and assistance in their homes. Every member of our team is committed to building lasting relationships based on honesty and trust with every client we serve.
- Help At Home, LLC/Oxford HealthCare compellingly believes that keeping people in the familiar surroundings of their home and community truly enhances their overall quality of life.
- Our employees are the key to our continued success. Help At Home, Inc./Oxford HealthCare are committed to supporting all of our team members in achieving their greatest personal and professional potential by providing comprehensive training, and continued support and education during their employment with us.

Help at Home, LLC

Utilization of EVV with our Clients, including those with preferred workers:

- Ability to maximize service Authorizations to keep Clients in their home, where they want to be
- Employee and caregiver compliance to program – visibility
- Reporting tools to manage schedules, authorizations, HR/Compliance

Challenges when changing from paper to EVV:

- Change management to ensure successful roll out
- Integration with existing systems and other required systems in other states
- Work load shift for ADMIN and field employees
- Full ability to eliminate all paper (when not using mobile app with signature and tasks)

Concepts of Independence

History

- 1977** • A small group of severely disabled individuals with high skilled needs began to develop a community-based model as an alternative to institutionalization.
- 1980** • Concepts began providing “patient managed home care services” to four Consumers and after one year had enrolled more than 100 Consumers.
 - CDPAS model expanded with the NYS exemption to the Nurse Practice Act, which allows a PA to perform tasks normally provided by a PCA, HHA, LPN or an RN.
- 2000** • NY State allowed voluntarily participation of Consumers into a MLTC plan.
- 2012** • Medicaid Redesign initiatives, all CDPAS Consumers, other than children and individuals with a waiver, were mandated into a Managed Care plan.
- Today** • We administer CDPAS for approximately 40 mainstream Managed Care Organizations and Managed Long-Term Care Plans across our caseload area of NY City and over 25 other NY State counties.
 - We also administer CDPAS for approximately 10 LDSSs. Combined, we currently serve approximately 4,000 Consumers who employ almost 8,000 Personal Assistants, from the tip of Long Island to the Canadian border.
 - To provide local presence, Concepts has established regional offices overseen by Concepts’ staff and/or partnerships with affiliated Independent Living Centers.

Concepts of Independence

Consumer Directed Time and Attendance Challenges

- Most EVV systems were developed for traditional home care, where the agency assigns the worker and knows the time-in and time-out and the tasks, etc.
- Most EVV systems require a schedule be established so that calls/electronic visit punches can be verified against the schedule so that the time and attendance can be accepted.
- Since Consumers have the flexibility to modify the schedule, many do so, even changing the worker and even the “start of shift” location WITHOUT notifying the FI
- Exceptions could include: (1) no “punch in”, (2) no “punch out”, (3) worker that “punched in or out” was not the same worker as on the “schedule”, (4) Phone number used for the call in (or call out) was not the same as the “schedule”, (5) the time for the “punch in” (or “punch out”) did not agree with the “schedule”
- Effort needed to properly document the exception is extremely time consuming
- If exception is not resolved timely, worker may not get paid for that day on the next pay date
- This may also create a problem with billing, depending on the funding source (DSS or MLTC)
- We have an extremely diverse Consumer/PA population with language barriers, cell phone/land line/internet coverage or availability

Note: Many of our Consumers have 4, 5 even 6 Personal Assistants, to cover their high hour authorization

Concepts of Independence

Solutions and Implementation

Develop an EVV system that allows Consumer choice and flexibility, therefore, will verify and accept a visit:

- Based on a pool of workers that have been hired by that Consumer
- Allow for the actual daily hours worked to fluctuate, as long as the weekly authorized hours are not exceeded.
- However, reasonable daily variances have been established by regional Consumer Advisory Committees.

Allow for a Consumer's choice by offering:

- A call-in system
- A fob mounted in the Consumer's home
- A smart phone app

Integrate this EVV system with a billing system

Integrate this EVV system with a payroll system

Within this integrated system, allow for Compliance Notifications to Consumers (i.e., Service Authorizations that are about to expire) and notifications to their PA's (i.e., medical exam anniversary due dates). So that if the matter is not remedied, a "hard stop" is placed in the system if the issue remains non-compliant.

Sandata Solution Value

With Sandata, you are partnering with a technology thought leader who can meet your program needs today and also has a vision for the future. We create a connected home and community based care network, which maximizes the effectiveness of your program; increases compliance through targeted measures and enforced EVV system utilization; and improves service delivery.

Date of Service

Location of Service

Individual Providing Service

Type of Service

Individual Receiving Service

Time Service Begins and Ends

Sandata's EVV Solution:

- Ensures Compliance with 21st Century Cures Act and is cited as a national reference by CMS;
- Flexible EVV without schedules
- EVV with location independence
- Designed to protect the Privacy and Civil Rights of Medicaid Members

Thank You

Happy to Address Questions

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For more information visit our website:

[www.sandata.com/solutions-for/participants/
EVV Vendors Q & A Document](http://www.sandata.com/solutions-for/participants/EVV_Vendors_Q_A_Document)

