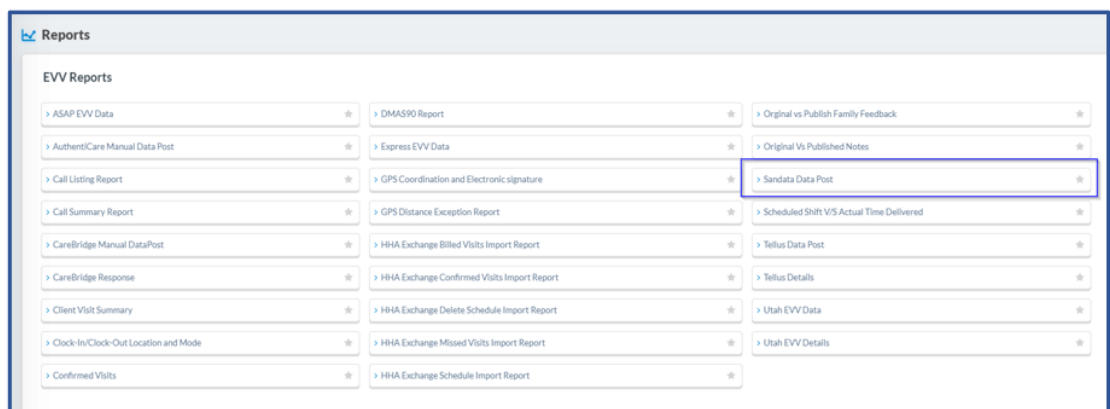# Sandata User Interface

Updates to our Sandata integration to make things easier for office staff

In February, 2021, we made some updates to the workflow for posting your EVV data to Sandata. The changes made it easier to see which schedules had errors that caused them to not be successful, and it put the whole process in 1 screen instead of 2.

Here are the steps.

Navigate to Reports>EVV and select "Sandata Data Post"

By default, you will be directed to
Entity: Visits
Data Posted: Not Posted
Date Range: The previous month
Clients: All
Caregivers: All
You will see 2 tabs: Not Posted/Exceptions

Sandata Data Post

Office(s)	Entity	Data Posted	Date Range	Client(s)	Caregiver(s)		
All Office selected	Visit(s)	Not Posted	03/01/2021 - 03/31/2021	All Client(s) Selected	All Caregiver(s) Selected	Schedule ID	Search

Not Posted Exceptions

	>	Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Action
☐	☐	16492	Bennett,Mary	Hurst,Louisa	Aetna Better Health of Ohio	03/19/2021 08:00 AM	03/19/2021 08:15 AM	Yes	
☐		16493	Bennett,Mary	Hurst,Louisa	Aetna Better Health of Ohio	03/20/2021 08:00 AM	03/20/2021 08:15 AM	Yes	
☐		16494	Bennett,Mary	Hurst,Louisa	Aetna Better Health of Ohio	03/21/2021 08:00 AM	03/21/2021 08:15 AM	Yes	

Each time you post, you will still need to check for Clients and Caregivers that you haven't posted successfully yet

Select the Entity

Select **Not Posted**

Sandata Data Post

Office(s)	Entity	Data Posted	Caregiver(s)
All Office selected	Caregiver(s)	Not Posted	All Caregiver(s) Selected

Entity ×

Caregiver(s) ⌄

OK

Entity	Data Posted	Date Range
Visit(Schedule)	Not Posted	01/05/2021 - 02/04/2021

Data Posted Type

Not Posted

Sandata Data Post

Office(s)	Entity	Data Posted	Caregiver(s)			2 Post to Sandata Search
All Office selected	Caregiver(s)	Not Posted	All Caregiver(s) Selected	Caregiver Name		

	Office Name	Caregiver	Caregiver Email	Caregiver SSN
☑ 1	Rochester Office, New York, USA	Vega, Rosalie	micky.bhambri@netsmartz.net	XXX-XX-3123
☑	Rochester Office, New York, USA	Cote, Adrian	arpit55.juneja@caresmartz360.com	XXX-XX-7701

Check on the Posted page, just to make sure that there aren't any that didn't post successfully in the past

Select the Entity

Select Posted

Sandata Data Post

Office(s)	Entity	Data Posted	Caregiver(s)
All Office selected	Caregiver(s)	Not Posted	All Caregiver(s) Selected

Entity

Caregiver(s) ×

Caregiver(s) ⌄

OK

	Entity	Data Posted	Caregiver(s)
Caregiver(s)	Posted	All Caregiver(s) Selected	

Data posted

Posted

	Office(s)	Entity	Data Posted	Caregiver(s)					2 Post to Sandata Search
	All Office selected	Caregiver(s)	Posted	All Caregiver(s) Selected	Caregiver Name				

	Office Name	Caregiver	Caregiver Email	Caregiver SSN	Status	Action
☐	Rochester Office, New York, USA	Baldwin, Austin	arpit55.juneja@caresmartz360.com	XXX-XX-3601	✔	👁
☑ 1	Rochester Office, New York, USA	Flynn, Michael	arpit55.juneja@caresmartz360.com	XXX-XX-7605	✖	👁

Click on the "eye" icon to see all attempts at posting

Status	Action
✖	👁
✔	👁

Click on the X on each line to see the error

Sandata Posted Details ✕

Batch Number	Posted On	Posted By	Status
Sandata_20210115145018	01/15/2021 09:50 AM	-	✖
Sandata_20210115130503	01/15/2021 08:05 AM	-	✖
Sandata_20200916145141	09/16/2020 10:51 AM	-	✖

Learn what data you need to correct

Message Summary: Error Description:
Records rejected, please review error and   NA
try again.

Client Display ID:
13

Type	Error Message	Description
Client	ERROR: A valid 12-digit PatientMedicaidID is required when the patient is not a new born or if the individual is being provided services by ODA only, the ClientMedicaidID can be optional and the 7-digit PIMS ID must be provided in the PayerClientIdentifier field.	

Once you have confirmed that all the clients and caregivers have been posted, you can post their schedules

Select the Entity

Select Not Posted

Sandata Data Post

Office(s)	Entity	Data Posted	Batch Status	Batch File
All Office Selected	Select	Posted	Select	Select

Entity Type

Select

Select
Patient(Client)
Staff(Caregiver)
Visit(Schedule)

Entity	Data Posted	Date Range
Visit(Schedule)	Not Posted	01/05/2021 - 02/04/2021

Data Posted Type

Not Posted

There are 2 tabs:

• Not Posted

• Exceptions

Sandata Data Post

Office(s)	Entity	Data Posted	Date Range	Client(s)	Caregiver(s)		
All Office selected	Visit(s)	Not Posted	02/01/2021 - 02/28/2021	All Client(s) Selected	All Caregiver(s) Selected	Schedule ID	Search

Not Posted   Exceptions

	>		Schedule ID	Client	Caregiver	Payer	Schedule Star
☐	>		15137	Jones,Randal	Price,Lynne	MOLINA HEALTHCARE OF OH	02/01/2021 (
☐	>		15138	Jones,Randal	Price,Lynne	MOLINA HEALTHCARE OF OH	02/02/2021 (
☐	>		15195	Peterson,Norman	Doubtfire,Euphegenia	Aetna Better Health of Ohio	02/02/2021 1

Exceptions—Add codes one at a time

Exceptions—Add codes bulk

After the codes have been added, move to the "Not Posted" tab

Sandata Data Post

Office(s) All Office selected	Entity Visit(s)	Data Posted Not Posted	Date Range 02/01/2021 - 02/28/2021	Client(s) All Client(s) Selected	Caregiver(s) All Caregiver(s) Selected	Schedule ID

Not Posted   Exceptions

☐	> ☐	Schedule ID	Client	Caregiver	Payer
☐	>	15137	Jones,Randal	Price,Lynne	MOLINA HEALTHCARE OF OH
☐	>	15138	Jones,Randal	Price,Lynne	MOLINA HEALTHCARE OF OH
☐	>	15195	Peterson,Norman	Doubtfire,Euphegenia	Aetna Better Health of Ohio
☐	>	15139	Jones,Randal	Price,Lynne	MOLINA HEALTHCARE OF OH

You can check the boxes next to the blue schedule and then select "Post to Sandata"

Sandata Data Post

Office(s) All Office selected	Entity Visit(s)	Data Posted Not Posted	Date Range 01/01/2021 - 01/31/2021	Client(s) All Client(s) Selected	Caregiver(s) All Caregiver(s) Selected	Schedule ID		❷ Post to Sandata Search

☐ ❶	Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Action
☑	87149	Bell,Marion	Johnson,Kurt	Bell,Marion	01/01/2021 06:00 AM	01/01/2021 07:00 PM	No	👁
☑	87104	Reese,Javier	Blair,Lora	Reese,Javier	01/01/2021 08:00 AM	01/01/2021 11:15 AM	No	👁
☑	87137	Gill,Nancy	Cobb,Norman	Gill,Nancy	01/01/2021 08:00 AM	01/01/2021 08:15 AM	Yes	👁

After the posting is done, change the filter to "Posted" to see any rejections and why the posting was not successful

Sandata Data Post

Office(s)	Entity	Data Posted	Date Range	Client(s)	Caregiver(s)					Post to Sandata Search
All Office selected	Visit(s)	Posted	12/30/2020 - 01/29/2021	All Client(s) Selected	All Caregiver(s) Selected	Schedule ID				

☑	Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Status	Action
☑	86132	Clayton,Dave	Albert,Eric	Clayton,Dave	12/31/2020 05:00 AM	12/31/2020 05:30 AM	Yes	✖	👁 ➕
☑	86136	Clayton,Dave	Albert,Eric	Clayton,Dave	12/31/2020 05:30 AM	12/31/2020 05:45 AM	Yes	✖	👁 ➕
☑	86159	Clayton,Dave	Albert,Eric	Clayton,Dave	01/01/2021 02:00 AM	01/01/2021 02:15 AM	Yes	✖	👁 ➕

A red X in the Status column indicates that the post was not successful.

Office(s)	Entity	Data Posted	Date Range	Client(s)	Caregiver(s)				Search
All Office selected	Visit(s)	Posted	01/01/2021 - 01/31/2021	All Client(s) Selected	All Caregiver(s) Selected	Schedule ID			

☐	Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Status	Action
☐	86209	Clayton,Dave	Alvarez,Teri	Clayton,Dave	01/01/2021 12:00 AM	01/01/2021 01:45 AM	Yes	✖	➕
☐	86159	Clayton,Dave	Albert,Eric	Clayton,Dave	01/01/2021 02:00 AM	01/01/2021 02:15 AM	Yes	✖	➕

You can click on the X icon to see the problem

	Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Status	Action
	86209	Clayton,Dave	Alvarez,Teri	Clayton,Dave	01/01/2021 12:00 AM	01/01/2021 01:45 AM	Yes	✗	+

Office(s)
All Office selected

Entity
Visit(s)

Data Posted
Posted

Date Range
01/01/2021 - 01/31/2021

Client(s)
All Client(s) Selected

Caregiver(s)
All Caregiver(s) Selected

Schedule ID

View status reasons

First, you will see the batch number, when it was posted and by whom.

If you have posted the same schedule multiple times, you can see that as well

Sandata Posted Details ✕

Batch Number	Posted On	Posted By	Status
Sandata_20210209163316	02/09/2021 11:33 AM	Bee, Joe	✗

Sandata Posted Details ✕

Batch Number	Posted On	Posted By	Status	Action
Sandata_20210129083146	01/29/2021 03:31 AM	Gupta, Priyank_Admin	✗	👁
Sandata_20210129081044	01/29/2021 03:10 AM	Gupta, Priyank_Admin	✗	👁

Then, click on the **X** to see the problem

Sandata Posted Details   ✕

Batch Number	Posted On	Posted By	Status
Sandata_20210209163316	02/09/2021 11:33 AM	Bee, Joe	✗

Sandata Posted Details   ✕

Batch Number	Posted On	Posted By	Status
Sandata_20210209163316	02/09/2021 11:33 AM	Bee, Joe	⌄

Message Summary:	Error Description:
[1] Records uploaded, please check errors/warnings and try again.	NA

Visit Other ID:
86209

Type	Error Message	Description
Visit	ERROR: The ProcedureCode length is invalid. The length should be between 5 and 5. The record is being rejected.	null
Visit	ERROR: The ProcedureCode length is invalid. The length should be between 5 and 5. The record is being rejected.	null
Visit Changes		Reason Code 70: Other

After you make the corrections to the schedule/payer/profile, you can just check the box and re-post.

Successful posting will change the **X** to a ✔

Sandata Data Post

Office(s)	Entity	Data Posted	Date Range	Client(s)	Caregiver(s)				2 Post to Sandata Search
All Office selected	Visit(s)	Posted	12/30/2020 - 01/29/2021	All Client(s) Selected	All Caregiver(s) Selected	Schedule ID			

☑	Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Status	Action
☑ 1	86132	Clayton,Dave	Albert,Eric	Clayton,Dave	12/31/2020 05:00 AM	12/31/2020 05:30 AM	Yes	✗	👁 ＋

If you successfully posted a schedule,

then you changed something about it that requires you to RE-post it,

you will do that by using the + icon

Yes	✖	✚
No	✔	✚
Yes	✖	✚

Sandata Reason Code   ✕

Reason Code *

Other   ⌄

Description *

zcvddv

☐ I hereby certify by entering the reason code & description to this visit is true & to best of my
knowledge correct and has been entered by me itself.

Close   **Save**

After you add the reason codes and save,

Check the box and then Post to Sandata

Sandata Data Post

Office(s)	Entity	Data Posted	Date Range	Client(s)	Caregiver(s)				② **Post to Sandata** **Search**
All Office selected	**Visit(s)**	**Posted**	**12/30/2020 - 01/29/2021**	**All Client(s) Selected**	**All Caregiver(s) Selected**	Schedule ID			

☑		Schedule ID	Client	Caregiver	Payer	Schedule StartDate/Time	Schedule EndDate/Time	Is Billable	Status	Action
☑ ①		86132	Clayton,Dave	Albert,Eric	Clayton,Dave	12/31/2020 05:00 AM	12/31/2020 05:30 AM	Yes	✖	👁 ✚

About Caresmartz, Inc.

Becoming a leading technology company within the homecare industry, Caresmartz, Inc. has helped hundreds of private-duty home care agencies, caregivers, home care startups, and office staff in their day-to-day operations through their software solutions. Their software, CareSmartz360, is tailored to the needs of their clients, giving them control over their home care business, from scheduling and client management to invoicing and much more.

To learn more, visit:
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