

## Data Entry for Providers Using the Sandata Solution

### Client and Employee Data Simplified



#### What is a Medicaid ID?

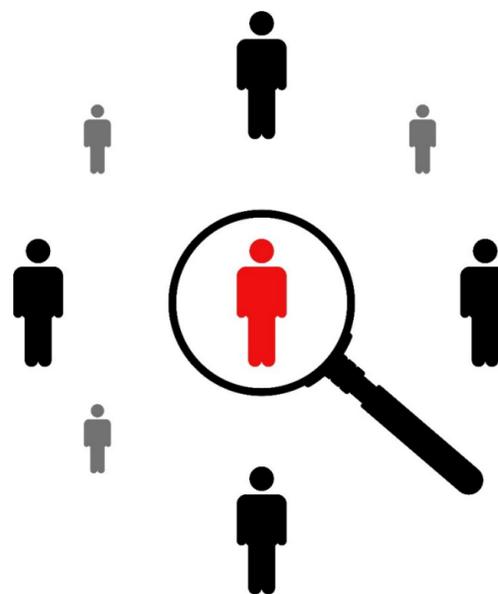
- Use the following guidelines for what to enter in the Medicaid ID field:
  - **IF** the services provided are for programs managed by Department of Health Care Services (DHCS), Department of Aging (CDA), CA Department of Social Services (CDSS), or CA Department of Public Health (CDPH), enter the **Client Index Number (CIN)**. The format is an 8-digit number + 1 capitalized letter.
  - **IF** the services provided are for programs managed by Department of Developmental Services (DDS), use the **7-digit Unique Client Identifier (UCI)** number.

#### Authorized Service(s) and Jurisdictional Entity (JE) Associations

- Client data entry must be done before submitting visits:
  - Clients must be associated with the correct payer and jurisdictional entity in the Client Payer section of the client record for each service they receive.
  - This will allow the jurisdictional entity to have access to that client's visit data for the associated services.
- Improper Client Payer associations may result in a data breach of **Personally Identifiable Information (PII)** and **Protected Health Information (PHI)**.

#### Data Entry: Employees

- All employees must be entered into the system before submitting visits.
- Ability to search, create, modify, remove, or reactivate employee records.
- When adding a new employee record, always search for the employee first to prevent any duplication of employee records.
- Once an employee is created, the Sandata system will generate a unique identifier, known as a Santrax ID. This number is required when employees use the Telephonic Visit Verification (TVV) option.



#### HHaEXchange Acquires Sandata Technologies

On October 3, 2024, [HHaEXchange](#), a leader in homecare management solutions for providers, caregivers, managed care organizations (MCOs), and state Medicaid programs, announced that it has acquired Sandata Technologies (California's state supplied EVV system). With four decades of experience, Sandata provides solutions that serve the homecare industry. Together, HHaEXchange and Sandata are well-positioned to meet the growing need for home and community-based services (HCBS).

- **Please note that this acquisition does not impact or change how California providers are to capture and submit EVV data. Current processes are to be continued.**
- [Sandata Press Release](#)
- [Frequently Asked Questions](#)



## Join us for our November Office Hours!

**Monday, November 4 | 11:00 am -12:00 pm**

[Register Here](#)

**Friday, November 15 | 2:30 pm -3:30 pm**

[Register Here](#)

**Note: Our Office Hours is Q&A only and will no longer include a presentation. Our EVV team can provide 1:1 assistance during this new Office Hours format.**

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**Here are some helpful links to get you started!**

[DHCS CalEVV website](#)

[Self-Registration Quick Reference Guide](#)

[CalEVV Data Entry: Clients](#)

[CalEVV Data Entry: Employees](#)

[Preparing a Bulk Upload](#)

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### **Need Assistance?**

For program policy questions, contact [EVV@dhcs.ca.gov](mailto:EVV@dhcs.ca.gov).

For CalEVV Technical Support, contact 1-855-943-6070 or [CACustomerCare@sandata.com](mailto:CACustomerCare@sandata.com).



Questions? E-mail us at: [EVV@dhcs.ca.gov](mailto:EVV@dhcs.ca.gov)

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