About Sandata - Establishing EVV Credibility

Product Solution Overview

Methods of Visit Verification – Mobile, TVV, FVV

System Data Flow
   – (including 3rd party agency Management and Aggregator feeds)

EVV – caregiver workflow

EVV – agency workflow

Why Sandata
About Sandata

**SOLUTIONS**

**INCREASING THE CAPACITY TO CARE BY...**

- Optimizing the value of every in-home encounter
- Maximizing the efficiency of homecare Providers
- Enabling collaboration between Payers and Providers

<table>
<thead>
<tr>
<th>EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Focused on homecare technology for 40 years</td>
</tr>
<tr>
<td>- Experience with 15 state Medicaid Agencies and 8 MCOs</td>
</tr>
<tr>
<td>- Only EVV solution with CMS certification</td>
</tr>
<tr>
<td>- Only vendor with experience with all 4 state EVV models</td>
</tr>
<tr>
<td>- Proven Statewide Open EVV solution</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCALE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- 220+ employees dedicated to the Home Care market</td>
</tr>
<tr>
<td>- 150M+ Transactions/year</td>
</tr>
<tr>
<td>- 90+ integration points with 3rd party systems</td>
</tr>
<tr>
<td>- 3K+ clients in US, managing 1.3M patients</td>
</tr>
<tr>
<td>- Daily reach of 400K+ homes</td>
</tr>
</tbody>
</table>
Sandata Solutions for Providers

Back office “Referral to Cash” agency management for Medicaid, Private Duty, Medicare, and Facility Staffing. Available in LITE and COMPLETE.

Device and browser agnostic EMR. Standard, Briggs, MedPass, and/or custom forms, completely integrated with Sandata Agency Management.

Electronic Visit Verification™ (Telephonic, Mobile GPS, and Fixed device) technology with integrated task reporting at the point of care.

Hard checks, direct deposit, and pay cards. Handle W2, 1099 employees, and contractors. Track hours for benefit eligibility tracking.

Print a list of the clients and hours on the check.

Scalable and flexible Revenue Cycle Management outsource solution. Support local and state Managed Care, Commercial Insurance, other Payers, and private-pay clients.

Mobile and web application that includes advanced shift targeting, distribution, and communication features to gain efficiencies coordinating and communicating with field caregivers.
Sandata Electronic Visit Verification (EVV): How it works for a caregiver

**Assured Coverage™**

**Telephonic Visit Verification™ - TVVTM**
- Uses ANI to match caller’s phone number to identify client
- Employee enters individual ID #
- Tasks and/or readings can be entered at the point of service

**Sandata Mobile Connect® - SMC**
- Identifies location using GPS
- Available for Apple and Android tablets or smartphones
- BYOD and agency supplied phones
- Works in connected and disconnected modes

**Patented Fixed Visit Verification™ Device – FVV™**
- Electronic random number match device
- No wifi, cellular, or satellite connectivity needed
Electronic Visit Verification (EVV): Data Flow

Clients, Employees, and Schedules (optional) are created in the Agency Management System and passed to Sandata EVV.

Transactions are recorded in Sandata and passed back to the Agency Management system to complete billing and payroll.

Transactions come in from the field via mobile device or Telephone and are matched against the schedule data in real time.
Choose Language, View Past and Future Visits (requires integration to scheduling software)

Available today:
- English
- Spanish
- Russian
- Somali
- Mandarin Chinese
- Egyptian Arabic
- Vietnamese
- Swahili
- Serbian
- Nepali
- Fulani
- French European
- Hindi

Coming soon 2019:
- Laotian
- Burmese
- Hmong

Caregiver can view schedule for 2 weeks into the future

Caregiver can view historical visits – (configurable # of days of prior history)
Turn by turn directions
Tasks, Visit Notes, and Visit Summary

**Configurable free text visit note optional or required**
Client Verification (service, time, and signature)
Final Summary and Confirmation
Office View: Real-time EVV Portal
Visit Maintenance
Visit Details, Manual Adjustments, and Client Signature

<table>
<thead>
<tr>
<th>CLIENT NAME</th>
<th>CLIENT ID #</th>
<th>MEDICAID ID #</th>
<th>EMPLOYEE NAME</th>
<th>EMPLOYEE ID #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Palme, Rick</td>
<td>489886</td>
<td>123456789012</td>
<td>Pellito, Steve</td>
<td>476702</td>
</tr>
</tbody>
</table>

**GENERAL**

- **VISIT START DATE**: 07/10/2018
- **VISIT END DATE**: 07/10/2018
- **VISIT TIME ZONE**: America/New_York
- **VISIT STATUS**: Verified

- **CALL IN**: 07:09 AM
- **CALL OUT**: 07:21 AM
- **CALL HOURS**: 00:12
- **UNITS**: None

- **ADJUSTED IN DATE**: 07/10/2018
- **ADJUSTED IN HH:MM AM/PM**: 07:09 AM
- **ADJUSTED OUT DATE**: 07/10/2018
- **ADJUSTED OUT HH:MM AM/PM**: 07:21 AM

- **AGENCY ID**: 10115
- **AGENCY NAME**: Demo Sales
- **BILL HOURS**: 00:12

- **PAYER**: ODM
- **PROGRAM**: SPHH
- **SERVICE**: SPHH Aide (G01: )

- **CLIENT VERIFIED TIME**: Yes
- **CLIENT VERIFIED SERVICE**: Yes
- **CLIENT SIGNATURE**: [Signature]

- **VISIT SOURCE**: SANDATA
- **DO NOT BILL**: No

Confidential and Proprietary

www.sandata.com
### Manage Exceptions

<table>
<thead>
<tr>
<th>CLIENT NAME</th>
<th>CLIENT ID #</th>
<th>MEDICAID ID #</th>
<th>EMPLOYEE NAME</th>
<th>EMPLOYEE ID #</th>
</tr>
</thead>
<tbody>
<tr>
<td>(516)848-7-</td>
<td></td>
<td></td>
<td>Sparacino, Sal</td>
<td>123456</td>
</tr>
</tbody>
</table>

- **Unknown Clients**: This exception needs to be fixed
- **Client Signature Exception**: 
  - **ACKNOWLEDGE THIS EXCEPTION**
GPS Map View
### Visit Details

<table>
<thead>
<tr>
<th>CLIENT NAME</th>
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#### Memo

Free text area for branch staff to log a note about the visit

963 characters remaining.

#### Visit Note

Visit Note
### Audit Trail of Manual Edits Made

**Visit Details**

<table>
<thead>
<tr>
<th>CLIENT NAME</th>
<th>CLIENT ID #</th>
<th>MEDICAID ID #</th>
<th>EMPLOYEE NAME</th>
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<td>476702</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REASON CODE</th>
<th>ITEM</th>
<th>DATE</th>
<th>CHANGED BY</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 - DCW/NAP Forgot to Call In</td>
<td>Visit - Update Adjusted Hours</td>
<td>6/26/2018 6:58:47 PM</td>
<td><a href="mailto:SPELLITO@sandata.com">SPELLITO@sandata.com</a></td>
</tr>
<tr>
<td></td>
<td>Visit - Update Memo</td>
<td>6/26/2018 6:56:27 PM</td>
<td><a href="mailto:SPELLITO@sandata.com">SPELLITO@sandata.com</a></td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries
# Visit Verification Report

**Account:**
- Name:
- Program: None
- Service: None

<table>
<thead>
<tr>
<th>MEDICAID ID</th>
<th>CLIENT</th>
<th>EMPLOYEE</th>
<th>DATE</th>
<th>START</th>
<th>ACTUAL END</th>
<th>HOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Smythe, Sylvester</td>
<td>Montgomery, Juliet</td>
<td>08/15/2017</td>
<td>11:52 AM</td>
<td>12:07 PM</td>
<td>0.25</td>
</tr>
<tr>
<td></td>
<td>Smythe, Sylvester</td>
<td>Montgomery, Juliet</td>
<td>08/15/2017</td>
<td>12:22 PM</td>
<td>12:29 PM</td>
<td>0.12</td>
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<tr>
<td></td>
<td>Smythe, Sylvester</td>
<td>Montgomery, Juliet</td>
<td>08/15/2017</td>
<td>01:08 PM</td>
<td>01:13 PM</td>
<td>0.05</td>
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<tr>
<td></td>
<td>Smythe, Sylvester</td>
<td>Montgomery, Juliet</td>
<td>08/15/2017</td>
<td>01:17 PM</td>
<td>01:20 PM</td>
<td>0.03</td>
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<td></td>
<td>Smythe, Sylvester</td>
<td>Montgomery, Juliet</td>
<td>08/15/2017</td>
<td>01:31 PM</td>
<td>01:37 PM</td>
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</table>

<table>
<thead>
<tr>
<th>BILL HOURS</th>
<th>CLIENT VERIFIED</th>
<th>SERVICE</th>
<th>TIME</th>
<th>SIGNATURE</th>
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<tbody>
<tr>
<td>0.25</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.12</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.08</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>0.03</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>0.06</td>
<td>No</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Report Parameters**

- Account:
- From: 08/15/2017
- To: 08/15/2017

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# ACTIVE CLIENTS

**Report Parameters**

- Account:
- From: 08/15/2017 - 08/15/2017

<table>
<thead>
<tr>
<th>CLIENT ID</th>
<th>MEDICAID ID</th>
<th>CLIENT NAME</th>
<th>PHONE #</th>
<th>ADDRESS</th>
<th>CITY</th>
<th>ST</th>
<th>ZIP</th>
<th>LATITUDE</th>
<th>LONGITUDE</th>
<th>ADDR VAL</th>
<th>CUSTOM ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>127789992</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>84070007</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55599024</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
EVV Within Sandata Agency Management
Transaction Details

- Signature

- Location
Why Sandata

• Most experienced EVV vendor available
• The ONLY EVV solution to have achieved CMS Certification
• Open integrations to third party solutions
• Fully compliant with 21st Century Cures Act requirements
• Flexible system configurations:
  – Multiple verification methods (TVV, SMC, FVV)
  – Integrated task capturing at the point of service
  – Simple
    • all visit (actual and rounded) and task data available on a single visit line
    • Exceptions clearly highlighted
    • View data agency wide or by individual scheduler
  – Real-time dashboard
  – Automatic Number Identification
  – Multiple rounding rules
  – Highly configurable rules setting for exception management
  – Data analytics and custom reporting
  – ROI producing features above and beyond just EVV
  – Simple per visit pricing structure (no maintenance, pmpm, or other hidden fees)
Thank you

STEVE PELLITO
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Phone: (516) 484-4400 Ext.4175