

## Document Scope

This Checklist is for agencies using Sandata Agency Management as an alternate EVV system sending data to the Indiana Aggregator.

If a confirmed visit is not present in Aggregator, there may be other conditions that have not been met. Check the items below to help ensure confirmed visits are sent to the Aggregator.

## Checklist

### Client Admission

#### General Section

- The Aggregator related or enabled payor must be ranked 1.
  - The **Cust. No.** (Customer Number) field on the Payor Information for Client screen must be populated. The customer number must be 12 or more characters.
  - The **Medicaid ID** on the Payer Information for Client screen must be populated.
- The **Enable Santrax** checkbox must be selected.
- There must be an authorization.
  - The authorization's **Service** and an **Event Code** must match the service and event code on the billing rate plan associated with the rank 1 payer (the DEF event code is not supported).

#### Personal Section

- The **Other ID** field must be populated.
- The client must have an address value in the **Address** field.
  - The address 1 and address 2 fields must not exceed 30 characters.

## Staff Profile

### General Section

- The **Agency ID** field must be populated.
- The **Santrax ID** field must be populated (the value entered cannot be '0').

### Personal Section

- The **SSN** field must be populated with a valid social security number.
- The Email field must be populated for the current address.
- Staff must be added to the stxStaffUploadDetails table (internal only via SQL query).
- Staff must have at least one valid visit that pushes to the Aggregator.

## Visit Maintenance (Schedule Detail Screen)

- The schedule must have a 'Confirmed' **Status**.
- The schedule must have a **Proposed** in time.
- The schedule must have a billable/payable **Event Code(s)**.
- The visit must have an assigned Client.
  - The client must have a valid billing rate.
- The visit must have an assigned Staff.
  - The **Override** checkbox must not be enabled for the assigned staff.
- The **Comments** may not exceed 240 characters.

## System Payor Screen (for the Clients Rank 1 Payer)

### General Tab

- The **Number** column for the location affiliated with the client must be populated.

### Santrax Settings Tab

- The **Enable Santrax For Clients With This Payor** checkbox must be enabled.
- The **Payer Name** must be populated.