Sandata
Get more right from the start

OUR IMPACT

To Our Valued Customers and Partners

As the Sandata team has begun to implement its 2022 strategy, I have been reflecting on all that we achieved in the last year. Despite the global pandemic, we were able to accomplish so much and that work was inspired by you, our valued customers and partners.

In the last year, we:

▶ Achieved HITRUST re-certification, which demonstrates our continued commitment to privacy, security, and compliance

▶ Assisted 10 states in achieving full CMS (Centers for Medicare & Medicaid Services) certification and 11 others in completing the final certification reviews for the EVV (Electronic Visit Verification) outcome-based certification process- 2 of the states are now awaiting their final approval for CMS certification and the remaining 5 are still in process.

▶ Brought new products to market, including Sandata Eligibility, Order Manager, and Claims Gateway

▶ Re-introduced the newly enhanced Sandata On-Demand

▶ Signed our 21st State contract

▶ Concluded the year by adding new key executives to our leadership team, including CTO Srini Achukola, CPO Ian Worden, and myself as CEO

While these are noteworthy moments within our year, I am also aware that we need to consider our impact. As such, it is my pleasure to introduce to you the 2021 Sandata Impact Report.

Transforming Healthcare in 2022

We are committed to providing you with the best industry-leading tools and solutions in 2022 so you can focus on what you do best: providing care. We are here to transform healthcare with the most trusted technology and unmatched experience. It will be rooted in the extra effort we make this year to listen to and engage with our customers, examining challenges faced in EVV, value-based care, and beyond.

Again, I thank you for your partnership with Sandata. The COVID-19 pandemic has forever changed the world, but because of it, we found new ways in which we could serve our customers. We hope you enjoy this piece, and we look forward to our future impact on our customers and the industry.

Sincerely,

Emmet O'Gara
Chief Executive Officer

WE ARE HERE TO TRANSFORM HEALTHCARE WITH THE MOST TRUSTED TECHNOLOGY AND UNMATCHED EXPERIENCE.

INTEGRITY

When Sandata handles your agency data, safety and security are paramount. "Security, privacy and data integrity define who we are and what we do," says Vincent Luciani, Chief Information Officer (CIO).

Sandata embodies integrity through our dedication to protect our customers' data, commitment to ethical practices, and continuous security training and education. At Sandata, employees are entrusted to protect patients' and caregivers' personal and healthcare information and handle that responsibility with the utmost discretion. To help ensure the integrity of data throughout our organization, we adhere to high-standards consisting of regular and detailed internal training, and continuous improvements to maintain our certifications.

High Standards

Sandata is a HIPAA-compliant organization, so we hold ourselves to a very high standard and are continuously searching for ways to improve our security. We question every security protocol, evaluate every data access point, and remediate every known vulnerability to ensure our customers' data is safe – no exceptions.

Our internal security training is required to be conducted at least two times per year. It covers how a company like Sandata can protect itself from becoming a victim of a data incident, the types of data we hold, and why our customers' data is so precious. With regular security education such as security awareness training, quarterly access audits, education modules, and mock phishing tests, we've ensured that security is a constant consideration for our employees.

HITRUST Certification

Every year, we renew our HITRUST Certification through a process that validates our security and privacy practices for storing, using, transferring, and disposing of data and information. HITRUST utilizes outside auditors to critically analyze, test our systems and practices, and then verifies our practices once again before granting us our certification.

Gaining our HITRUST Certification also requires us to improve upon our security and safety measures year after year. In 2021, we conducted more frequent and detailed audits, identified emerging security threats (and trained our teams accordingly), and educated our customers on the importance of data security/integrity.

Looking Forward to 2022

The biggest changes coming to Sandata in 2022, in regards to integrity and security, surrounds the rollout of multi-factor authentication (MFA) and the diversification of our hardware and software environments. The continuous improvement efforts help us eliminate risks, exposures and potential threats.

Sandata's team is working on further enhancing account security by adding multifactor authentication to its platforms. "MFA is an industry standard when it comes to login security and is a method used by almost all leading software providers," says Luciani. "We want to ensure that our customers have the latest protections in place and MFA enables this for them," says Luciani.

In addition, Sandata continues to diversify its network making its systems more dynamic to expand or contract capacities which will make processes, systems, and servers more readily available to our customers. Through diversification, Sandata is able to further strengthen our security and our system's resilience against both physical and digital threats, ensuring that one incident cannot affect the entire system.

To Our Customers

Integrity in our security practices is not about meeting a requirement to keep your data safe. It's about understanding the value of your information and safeguarding it as if it were our own. It's about dedicating ourselves to adapting, innovating, and improving our systems. Most importantly, integrity is about earning our customers' trust and confidence every day.

INTEGRITY IS ABOUT EARNING OUR CUSTOMERS' TRUST AND CONFIDENCE EVERY DAY.

ACCOUNTABILITY

Being accountable to our customers is not something we feel obligated to do, it's something we're passionate about. It's a value that keeps our standards high, our customers happy, and our organization successful.

Accountability has permeated all interactions with our customers and drives success through the customer journey. From Sales through Professional Services and on to Support, we create customer expectations and fulfill our responsibilities with transparent communication, unwavering dedication to our obligations, and a willingness to thrive.

Setting Expectations During Sales

Accountability begins early in the customer journey with transparency. We want to help our customers understand the path through implementation, not just the technology. By immediately creating realistic customer expectations, we can hold each other accountable along the way and ensure that you not only have a successful implementation, but a positive experience with our team.

"Our people make the difference," says Angel Newsom, Chief Customer Officer (CCO). "No matter where you are on this journey, whether you are an agency, caregiver, or state program, you're going to have people along that path to guide and direct you."

Mutual Accountability During Implementation

In 2021, we re-envisioned our customer implementation to emphasize that we are not just here to train our customers on how to use our software, but to foster a lifelong relationship as we enable them to achieve more than they thought possible.

"We are helping customers understand their commitment, dedication, and work is essential to success in this implementation. Implementation is a partnership, and we need to work together to make this process efficient and successful," says Carey L. Sowle, SVP Professional Services.

Implementation is a collaborative partnership with clear expectations, responsibilities, and escalation paths with a distinct end goal: the customer's go-live date. The most successful customers are the ones who understand, embrace, and fully commit to mutual accountability and transparency in the process.

Accountability in 2021 and 2022

Part of accountability is listening to our customers' feedback, understanding their evolving needs, and providing them with resources and innovations that will simply make their experience with Sandata better.

Here are some of the ways we improved our implementation process in 2021:

- Created precise and transparent implementation goals and ensured all our actions brought us closer to success.

- Instilled a greater focus on partnership earlier in the customer journey, so our customers understood how to enable a successful implementation.

- Encouraged honest communication both internally and externally to manage expectations and feedback in a more productive manner.

- Increased the number of implementations a team member can manage effectively by automating some of our processes, improving our internal products, and reprioritizing tasks to alleviate stress on our team.

In 2022, our goal is to make implementation even better. We envision a smooth, consistent, 90-day process where challenges are anticipated and resolved early and efficiently. This means more open communication, embracing difficult conversations, and understanding that accountability is a positive addition to our work and our lives.

Remaining Accountable with Continued Support

Working with Sandata is a lifelong, client-centric partnership that doesn't end when our customers move from implementation to support. "We don't leave our customers. We ensure a continuity of care and a continuity of coverage, providing them with informative and instructional resources and support personnel that help position them for success," says Tim Nyberg, SVP Strategy.

To Our Customers

We are accountable to our customers through every step of their journey. Whether we are creating expectations in sales or communicating in customer support, our relationships with our customers are based on mutual trust, confidence, and a system of accountability.

ACCOUNTABILITY HAS PERMEATED ALL INTERACTIONS WITH OUR CUSTOMERS AND DRIVES SUCCESS THROUGH THE CUSTOMER JOURNEY.

CLIENT-CENTRIC

Our relationship with our customers is a valued lifelong partnership that we are fostering with intention. Sandata's internal journey is guided by the impact our decisions have on our customers, and our unique approach to client care has created a system of continuous feedback and transparency, which has allowed us to offer the most impactful solutions.

2021: A Year of Resources

In 2021, we aimed for more extensive and detailed customer feedback to influence our growth. From this feedback, we noticed our vendors and agencies were successfully using our software, though not to their greatest potential. Addressing this gap would mean our customers could have a more thorough implementation and application of our software in nearly limitless ways. From this, Sandata On-Demand was born.

Sandata On-Demand

With over 160 home care and I/DD agencies and 15 state or state projects already live, Sandata On-Demand was enhanced to offers a secure portal for customers to access training videos, release notes, reference guides, and over 1,200 articles. With a full text and video library of resources, Sandata On-Demand improves our customer support.

It also offers more visibility on support tickets than ever before. If customers submit a support request, they can track their ticket every step of the way, know what agent they're working with, and get information on the status of their ticket in real time. In 2021, we solved 134,509 support tickets, demonstrating to our customers that we are committed to their success.

2022: The Voice of the Customer

In 2022, we are going to offer more resources to our customers and bring more information directly to them, so they don't have to waste time searching for answers.

We are building a "voice of the customer" program that will offer opportunities for surveys and interviews to encourage our customers to tell us what we are doing well and where we need to improve. "Our customers have ideas, and we want that feedback so we can improve in the ways they need us to," says Newsom. Keeping our customers' voice at the forefront of our work gives us the opportunity to constantly address friction points, streamline customer experiences, and maintain transparency as we implement new changes.

Customer Success Managers

Our relationships with our customers do not end after implementation. Customer Success Managers are an indispensable resource for our customers and our teams, ensuring the continuation of success while using our software and bringing the data from their feedback to life.

Customer Success Managers help us understand how our customers' programs are performing, assist them in making key decisions, and help pinpoint service gaps. They also create partnerships to enable and empower customers to do more with our technology.

To Our Customers

Customers stay with Sandata because we have the greatest expertise in the field. Whether it's product development, engineering, or communication, we know the business and the regulations. We are on the pulse of what's happening in the industry and how everything affects you. We have been through it, we understand it, and we can guide you when changes occur.

"It all goes back to people. We are constantly evolving to ensure that we are meeting the needs of our customers," says Newsom. "We, as an organization, hold ourselves to a different standard. And that standard is not selling our customers a piece of software, but ensuring that they are getting the most value out of it."

KEEPING OUR CUSTOMERS' VOICE AT THE FOREFRONT OF OUR WORK GIVES US THE OPPORTUNITY TO BE OUR VERY BEST.

INNOVATION

The desire to generate value through innovation has always been a driving force at Sandata. "Historically, innovation is a key component of Sandata's DNA," notes Emmet O'Gara, Chief Executive Officer. "We were first-to-market with many of the solutions that are ubiquitous today in home care. We have led the home care and EVV market transformation since our inception 40 years ago."

WE INTEGRATE PERSPECTIVE ACROSS THOUSANDS OF AGENCIES, CAREGIVERS, AND PAYERS TO INFORM DECISIONS ABOUT DELIVERING INNOVATION FOR OUR CUSTOMERS.

Advancing the Journey in 2021

In 2021, we continued our mission to innovate our solutions in the pursuit of providing better offerings and services to our customers while scaling internally to facilitate growth.

We introduced Order Manager, a new product to help our payer clients better manage case referrals and reduce time to member placement with the right agencies. Order Manager enables Managed Care Organizations (MCOs) to authorize services and distribute cases electronically, allowing providers to accept cases on an easy-to-use platform.

Internally, our teams adopted innovative technologies, pursued automation improvements, and invested in our technology stack to allow Sandata to scale and support more customers. This means we're prepared to grow with our customer community and deliver operational consistency and quality for their critical programs.

Leadership Engagement

This year, Sandata intentionally aligned executive sponsors to a majority of our clients in addition to our standard support model. Our leadership team is establishing regular check-ins and purposeful engagement with our customer base to increase open communication.

Leadership involvement offers an additional avenue for customers to share their successes, express perspective on our dynamic markets for roadmap consideration, and convey challenges that require a solution. Through an internal accountability model, we are staying close to the pulse of our clients and the members they serve.

Innovation in 2022

In 2022, our customers will benefit from the launch of our new application, Sandata Claims Gateway. This will enable payers to automatically review claims before submission and verify that all EVV data matches the claim. Claims and billing processes will be streamlined, visibility and accuracy of claims will improve, and denials will be minimized.

In addition, we are refreshing user interfaces, building user-friendly reporting capabilities, and automating workflows across our product suite. "Self-service and automation continue to be critical to our end users," reports Srini Achukola, Chief Technology Officer. "We are investing meaningfully to drive automation and efficiency for our clients, reflecting current and future market requirements."

To Our Customers

"To our customers, innovation should mean that Sandata continuously leverages new solutions to solve emerging regulatory or care continuum needs for payers and providers," comments Newsom. "We integrate perspective across thousands of agencies, caregivers, and payers to inform decisions about delivering innovation for our customers."

As stated, innovation is an integral part of Sandata's DNA and will continue to drive our organization forward as we strategize with clients, deliver valuable solutions, and grow with the changing market. "Our clients realize value when they succeed at optimizing care and extending the impact of every dollar. We strive to positively influence healthcare being delivered to the folks that need it the most," says Nyberg. "That's the fire that keeps us going."

TEAMWORK

As the world grows and evolves, so does Sandata.

Over the past two years, Sandata has seen a major culture shift to a people-focused strategy. When we decided to develop this new strategy, we discussed Sandata's values, the strengths and weaknesses of our teams, and our vision for the future.

HOW DO WE WANT TO GROW – NOT ONLY IN SALES OR IN NUMBERS – BUT IN TALENT, CULTURE, AND DIVERSITY?

At Sandata, we envision a future where our organization is further strengthened by positivity, diversity, and teamwork. We know our culture shift has already made an incredible, positive impact on our internal team and our customers, and we are thrilled for the endless possibilities ahead of us.

Breaking Down and Building Up

Sandata is emphasizing accountability as we evolve to a culture of greater teamwork than ever before. We've broken down departmental separations, so our teams understand their own positions better, how their work is critical to others, and how they can impact the rest of the Sandata team.

Our ultimate goal is to increase our performance and the effectiveness of our products, and by working together with greater visibility and accountability, we know our customers will see a better outcome.

The Importance of Diversity, Equity, and Inclusion

We understand how valuable it is to have a rich and diverse team of talented people. We want to mirror the communities we serve and have expanded the recruitment of diverse talent to enrich our organization while creating equitable and inclusive opportunities for growth within our team.

Recruiting diverse talent can mean a lot of things, but for Sandata it means attracting the most talented people of differing racial and ethnic backgrounds, gender and sexual identities, veteran statuses, and beliefs. "We want to bring a more beautiful quilt of employees to our talented team. We look for individuals that are culturally additive to our organization," says Doug Nafziger, Chief Administrative Officer.

We've also changed our national recruiting processes. We train managers to reduce or eliminate hiring bias, conduct national candidate searches, offer benefits that align with our candidates' needs, and annually track diversity amongst all employees to ensure we are continually working toward our vision of diversity, equity, and inclusion.

"Diversity of people leads to a diversity of ideas," says Nafziger. "Diversity will always lead to better outcomes and better experiences." While Sandata is proud to have industry-leading statistics for diversity, equity, and inclusion, we also know there is always room for improvement, and we will continue to strive for an equitable future, both for our internal team and for the communities we serve.

To Our Customers

Our teams are highly adaptable and genuinely love helping our customers see the value in the software they've purchased and just how much it can positively impact their lives and their business.

When an organization like Sandata has a diverse, positive, and people-focused group of talented team members that work together effectively, we can learn and grow much more quickly, creating better products, better service, and a better future for our customers.

Sandata

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