## EOEA - Aging and Disability (A & D) Minimum Data Standards

**Consumer Demographic Data**

## Revision History

| **Date** | **Version** | **Description** | **Author** |
| --- | --- | --- | --- |
| November, 2021 | 1.0 | Initial Release | EOEA |

# Overview

This document provides System Instructions, best practices and establishes data standards to be followed by all SIMS users for any registered consumers or older adult who has a record within Aging and Disability (previously known as SAMs). ASAPs/AAAs that use the Aging and Disability consumer database for any program data entry are required to adhere to minimum data standards for good data hygiene.

# Objectives

This document sets minimal requirements, best practices and data standards for all SIMS users to ensure accuracy and standardization of data; such as, data records, program integrity, information security, correct usage in external systems, and data quality for finance and downstream analytics. **Accuracy within records directly impacts:**

* **the ability to perform accurate consumer searches,**
* **non-duplication of consumer records,**
* **a clear understanding and comprehensiveness of consumer care,**
* **completeness and improved consumer record information,**
* **the history of consumer’s programmatic life cycle**
* **the availability for smooth claiming and payments of services,**
* **enhanced data analytics,**
* **accuracy of reporting for additional advocacy**

## Characteristics of Good Data Hygiene

Below are several data standards required by EOEA. ASAPS/AAA are required to review and maintain data frequently to ensure accuracy of their records. If the ASAP/AAA identifies or is notified of a data inaccuracy or error, regardless of consumer’s active enrollments, the ASAP/AAA must remediate the data issue immediately.

* **Data Field Standards:**
	+ No Dummy, Test, or fictitious consumers – ie: Jonathan Springwell.
		- All ASAPs have access to Sandbox for all testing and practice of system functions
	+ Duplicate consumers are not permissible:
		- If a duplicate consumer is identified, it must be remediated immediately per instructions.
		- Please review process for merging consumers on the SIMS Support Blog
		- Test before merging
	+ Active consumers should have at least one Care Enrollment open within their record.
	+ Inactive consumers should not have:
		- Active Care Enrollments
		- Active Activity/Referrals
		- Active Care Plans
	+ The **Notes** field on the Consumer Details Page may never be used for recording protected or sensitive information as this field is visible to all SAMs users.
		- Protected and sensitive information includes:
			* Medical Conditions/Diagnosis
			* Protective Services information
		- Examples of acceptable information to be contained in the **Notes** field includes, but is not limited to:
			* Best time to contact
			* Best number to contact
			* If visit requires two ASAP staff members
* **Consumer level data requirements:**
	+ **Default Agency** listed within the SAMs record should always be the Home Care Case Management Agency, Senior Care Options Agency (SCO), or Personal Care Attendant Agency (PCM).
	+ All Consumer or Caller level data must be entered in accordance with Alliance of Information & Referral Systems(AIRS) Standards
	+ Consumer Information:
		- Consumer’s **Last Name** (consumer’s legal name) reflects established I&R standards (AIRS Standards):
			* Including, but not limited to spelling, punctuation and grammar (O’Connor; not O Connor, not O’ Connor)
		- Consumer’s **Residential Address** is complete, with accurate information entered for each; Address\_1, City, State, and Zip.
			* Zip Codes should be validated by a mapping service such as Google maps.
			* Address 1 shall not be blank when a consumer is receiving programmatic services
		- Consumer’s **Primary Address** - “residential” or “mailing” address location must be marked as primary locations.
			* Secondary addresses are complete within the consumer’s record when applicable.
		- For consumers residing in buildings, addresses remain consistent for all
			* Example: St. or Street
			* Apt. number
			* Zip Codes should be validated by a mapping service such as Google maps.
	+ Consumer **Active Status** – consumer records shall be deactivated when applicable including but not limited to instance of Consumer death or move out of state.
	+ Each consumer record shall have complete and accurate information entered for each:
		- **Date of Birth**
		- **MassHealth ID** number when applicable
			* Leave field **blank** if consumer’s MassHealth ID number is not known
			* Do not use “Pending.”
			* MassHealth ID should not be removed from the consumer’s record regardless of MassHealth coverage (Terminated, Pending) due to claiming
			* When applicable **MassHealth ID** number must be verified to ensure MassHealth coverage.
			* All MassHealth ID numbers can be verified through MassHealth Eligibility Verification System (EVS)
			* **MassHealth ID** number contains 12 numeric digits and no alpha characters.