



**SANDATA ELECTRONIC  
VISIT VERIFICATION (EVV):  
SANDATA MOBILE  
CONNECT (SMC)**

# OBJECTIVES

After completing this lesson, you will be able to:

- ◆ Explain the purpose and basic functionality of Sandata Mobile Connect (SMC)
- ◆ Access and log on to SMC
- ◆ Identify the SMC window elements and explain how to navigate within the SMC App
- ◆ Describe the back-up call process utilizing the client's telephone or any phone associated with the client



# INTRODUCTION

- ◆ Sandata Mobile Connect (SMC) allows an employee to start and end a visit without requiring the use of the client's home phone. SMC is the primary and preferred method of calling in and out for client visits.



An employee can start a visit using SMC and complete the visit using TVV and vice versa, if required.

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# SET UP AND CREDENTIALING

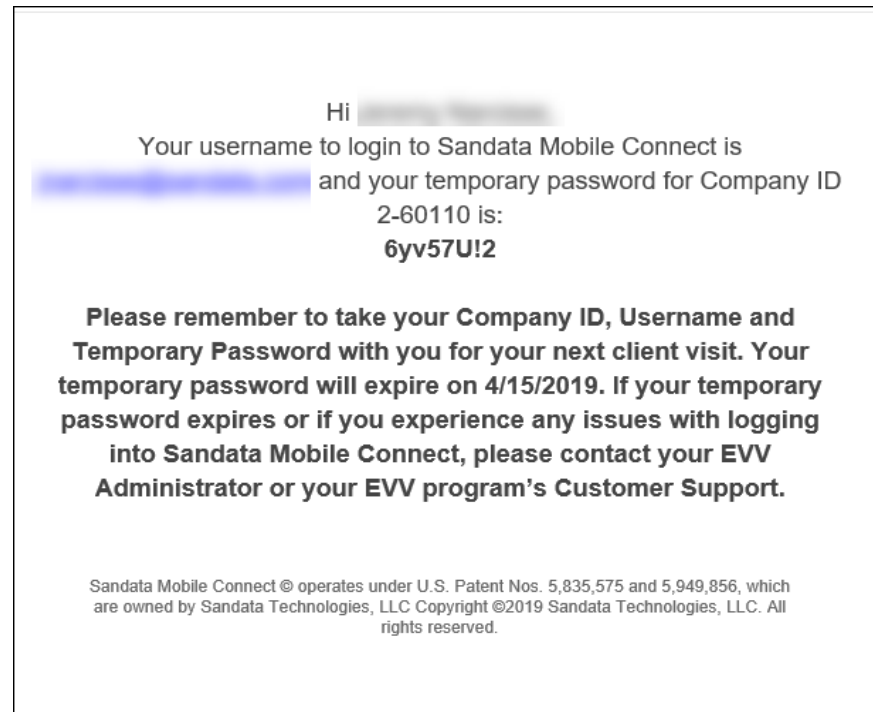


## SET UP AND CREDENTIALING

- ◆ SMC user credentials for employees are generated when the employee is created as an Employee in Sandata EVV.
- ◆ When an agency provider creates an employee, the following information must be specified in the employee profile in order for SMC to create the login credentials.
  - First and Last name
  - Valid email address
  - Social Security Number
  - Check the MOBILE USER checkbox in the Employee record

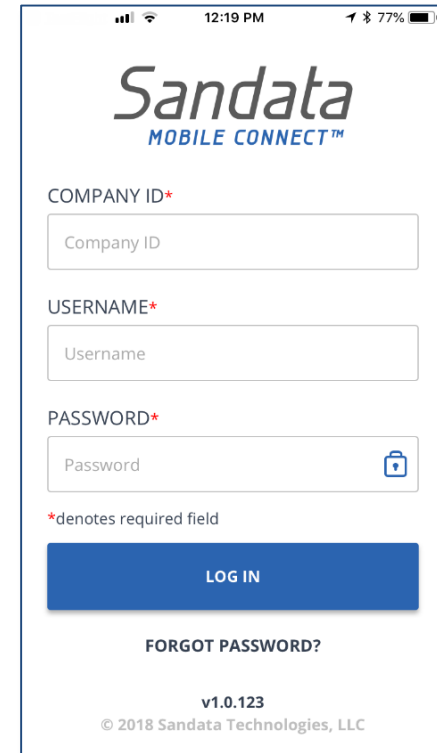
# SET UP AND CREDENTIALING

- ◆ When these values are captured and the employee record is saved, Sandata EVV generates a temporary SMC password and sends it to the email address entered.



# SET UP AND CREDENTIALING: INITIAL SET UP

- ◆ When the employee logs in to SMC for the first time, he or she will need to enter the following data elements:
  - **Company ID:** 2-Sandata account# (always the number 2 plus a dash and the agency provider's assigned Sandata account #)
  - **Username:** employee's email address
  - **Password:** the temporary password emailed to the employee's email address entered when creating the employee.



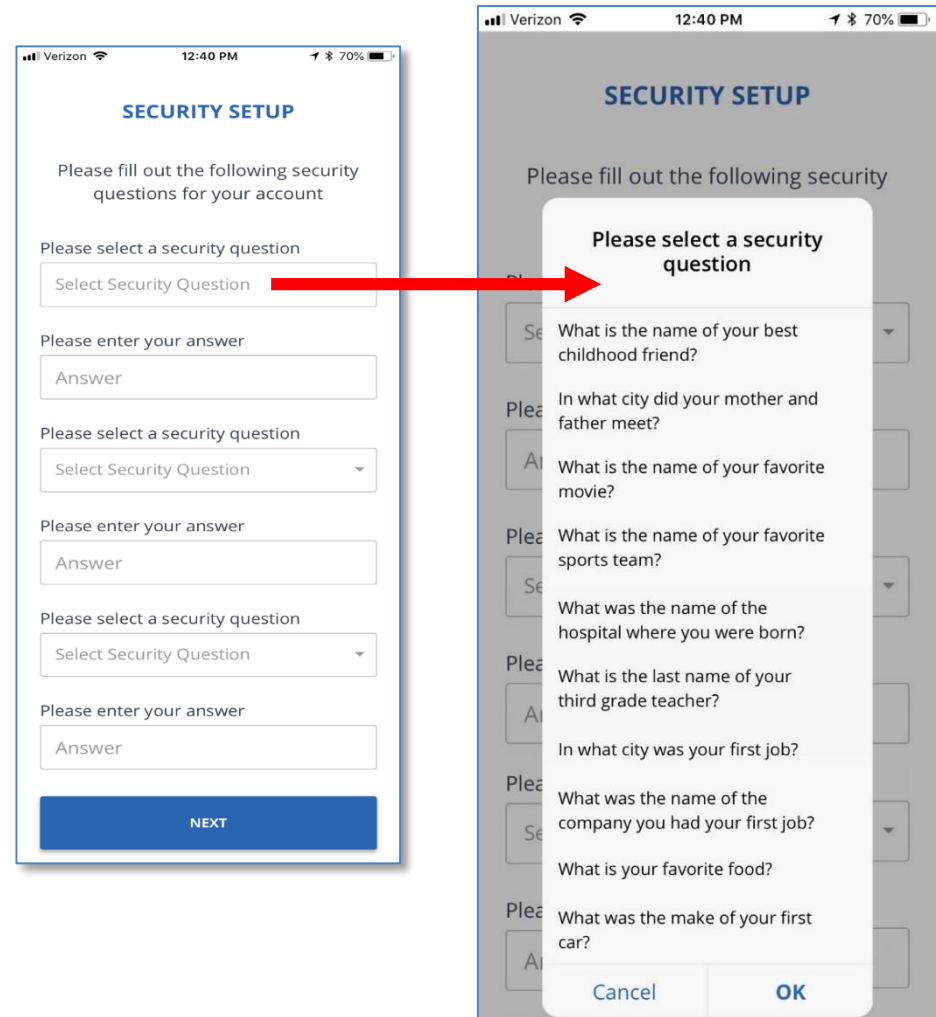
The screenshot shows the Sandata Mobile Connect login interface. At the top, the Sandata logo and 'MOBILE CONNECT™' are displayed. Below the logo, there are three input fields: 'COMPANY ID\*' with a placeholder 'Company ID', 'USERNAME\*' with a placeholder 'Username', and 'PASSWORD\*' with a placeholder 'Password' and a lock icon. A note below the fields states '\*denotes required field'. A blue 'LOG IN' button is positioned below the fields, followed by a 'FORGOT PASSWORD?' link. At the bottom, the version 'v1.0.123' and copyright '© 2018 Sandata Technologies, LLC' are shown.



Tapping the lock icon in the PASSWORD field displays the password. Displaying the password can help with initial log-in and temporary password entry.

# SET UP AND CREDENTIALING: INITIAL SET UP

- ◆ Upon logging in to SMC for the first time, the employee is asked to select and define answers to a set of security questions.
- ◆ After answering the required security questions, the next screen prompts the employee to create a new password.



The image displays two screenshots of the Sandata mobile application's security setup process. The left screenshot shows the 'SECURITY SETUP' screen with the following text: 'Please fill out the following security questions for your account'. It contains three identical sections, each with a 'Please select a security question' dropdown menu, a 'Please enter your answer' text input field, and a 'Please select a security question' dropdown menu. A blue 'NEXT' button is at the bottom. A red arrow points from the first dropdown menu to the right screenshot. The right screenshot shows a modal dialog with the text 'Please select a security question' and a list of questions: 'What is the name of your best childhood friend?', 'In what city did your mother and father meet?', 'What is the name of your favorite movie?', 'What is the name of your favorite sports team?', 'What was the name of the hospital where you were born?', 'What is the last name of your third grade teacher?', 'In what city was your first job?', 'What was the name of the company you had your first job?', 'What is your favorite food?', and 'What was the make of your first car?'. The dialog has 'Cancel' and 'OK' buttons at the bottom.

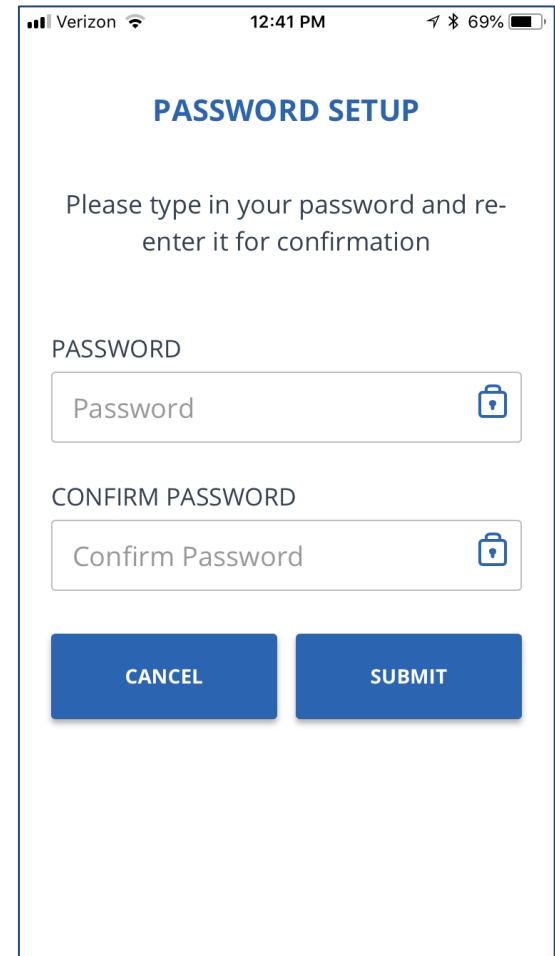


# SET UP AND CREDENTIALING: INITIAL SET UP

1. Enter the New Password
2. Confirm Password
3. Click **SUBMIT** after entering the new password.
4. The Login screen displays. The employee can now use the new password to login.

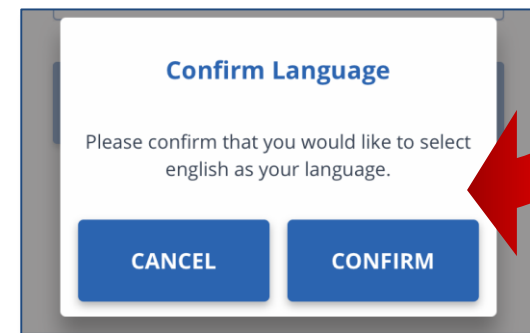
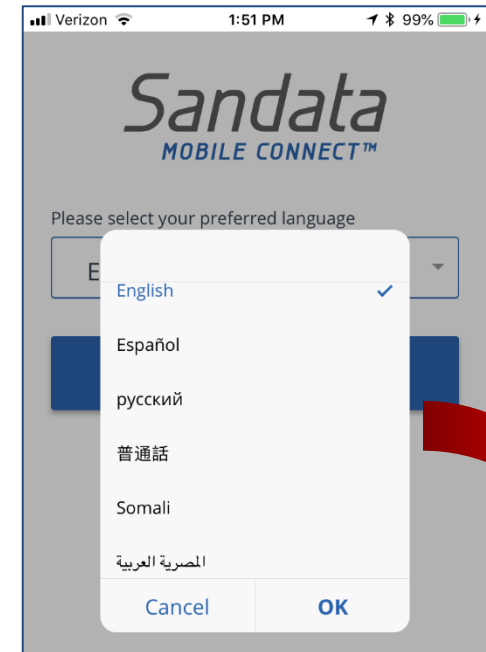


Passwords are case sensitive. They must be at least eight characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (i.e. @#\$%^).

A screenshot of a mobile application's password setup screen. The screen is titled "PASSWORD SETUP" in blue. Below the title, it says "Please type in your password and re-enter it for confirmation". There are two input fields: "PASSWORD" and "CONFIRM PASSWORD", each with a lock icon on the right. At the bottom, there are two blue buttons: "CANCEL" and "SUBMIT". The status bar at the top shows "Verizon", "12:41 PM", and "69%" battery.

# SET UP AND CREDENTIALING: INITIAL SET UP

- ◆ After successfully logging in with the new password, the next screen prompts the employee to confirm the language preference from a drop-down list on the screen.
- ◆ Languages available for the program include:
  - English
  - Spanish
  - Russian
  - Mandarin Chinese
  - Somali
  - Egyptian Arabic

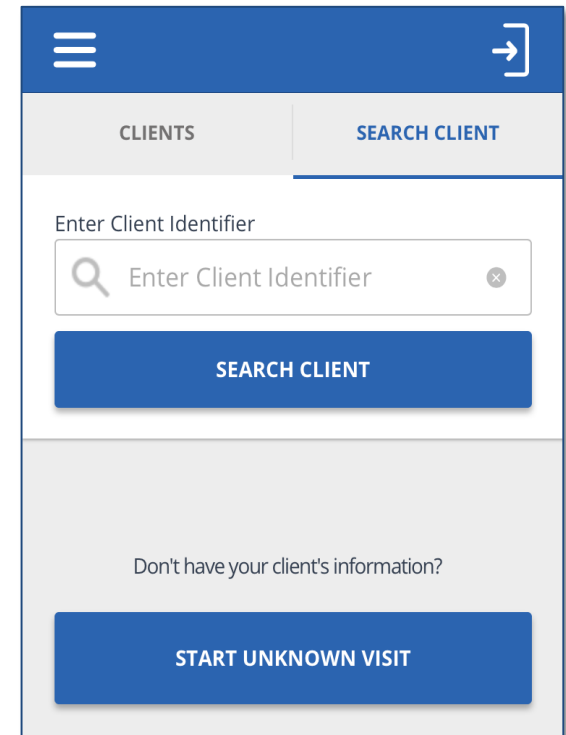





# NAVIGATING THE HOME SCREEN

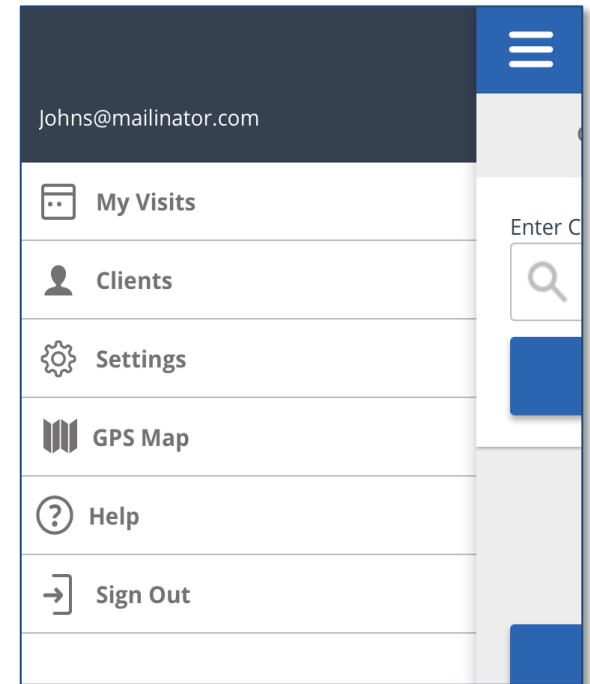
# NAVIGATING THE HOME SCREEN

- ◆ Upon successfully logging in to SMC, the user is presented with the Home screen. From this screen, the user is able to:
  - **Search for a client to start a visit** – tap into the **ENTER CLIENT IDENTIFIER** field and enter the ID to search for the client.
  - **Start an unknown visit** – tap the **START UNKNOWN VISIT** to enter the client's name and Medicaid ID in order to start the visit.



The screenshot shows the SMC Home screen. At the top, there is a blue header with a hamburger menu icon on the left and a home icon on the right. Below the header, there are two tabs: "CLIENTS" and "SEARCH CLIENT". The "SEARCH CLIENT" tab is active. Underneath the tabs, there is a section titled "Enter Client Identifier" with a search input field containing the placeholder text "Enter Client Identifier" and a magnifying glass icon on the left and a close icon on the right. Below the input field is a blue button labeled "SEARCH CLIENT". At the bottom of the screen, there is a light gray section with the text "Don't have your client's information?" and a blue button labeled "START UNKNOWN VISIT".

- ◆ The user can also tap the menu icon in the upper-left corner of the screen to access:
  - **My Visits**
  - **Clients** – to perform a client search.
  - **Settings** – to change language preference and password. All other options on the settings screen are disabled.
  - **Help** – to open the SMC help guide.
  - **Sign Out** – to exit SMC (The user can also tap the Sign Out icon  in the upper-right corner of the screen to log out of SMC).

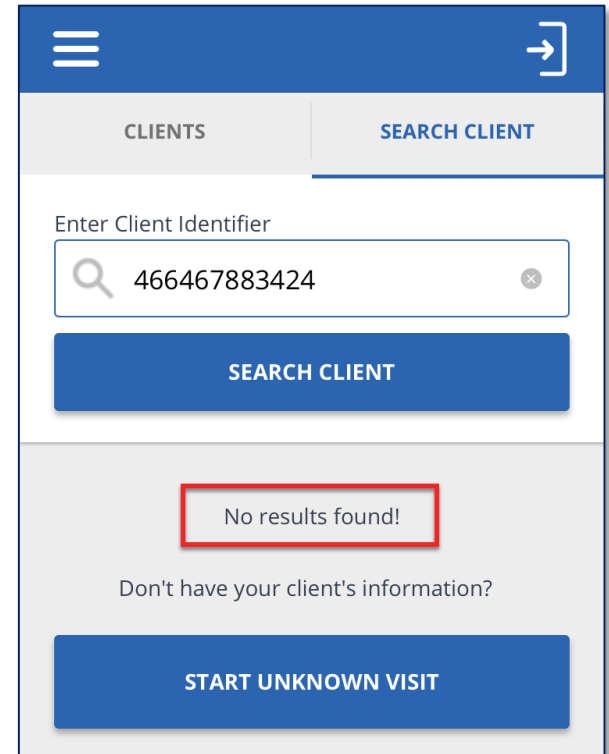




# STARTING A VISIT

# STARTING A VISIT

- ◆ When the employee arrives to provide care to the client, he or she will:
  1. Log in to SMC.
  2. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the ID of the client.
  3. Tap the **SEARCH CLIENT** button. (If ID entered does not match to any client, a “no results found” message displays).



CLIENTS SEARCH CLIENT

Enter Client Identifier

466467883424

SEARCH CLIENT

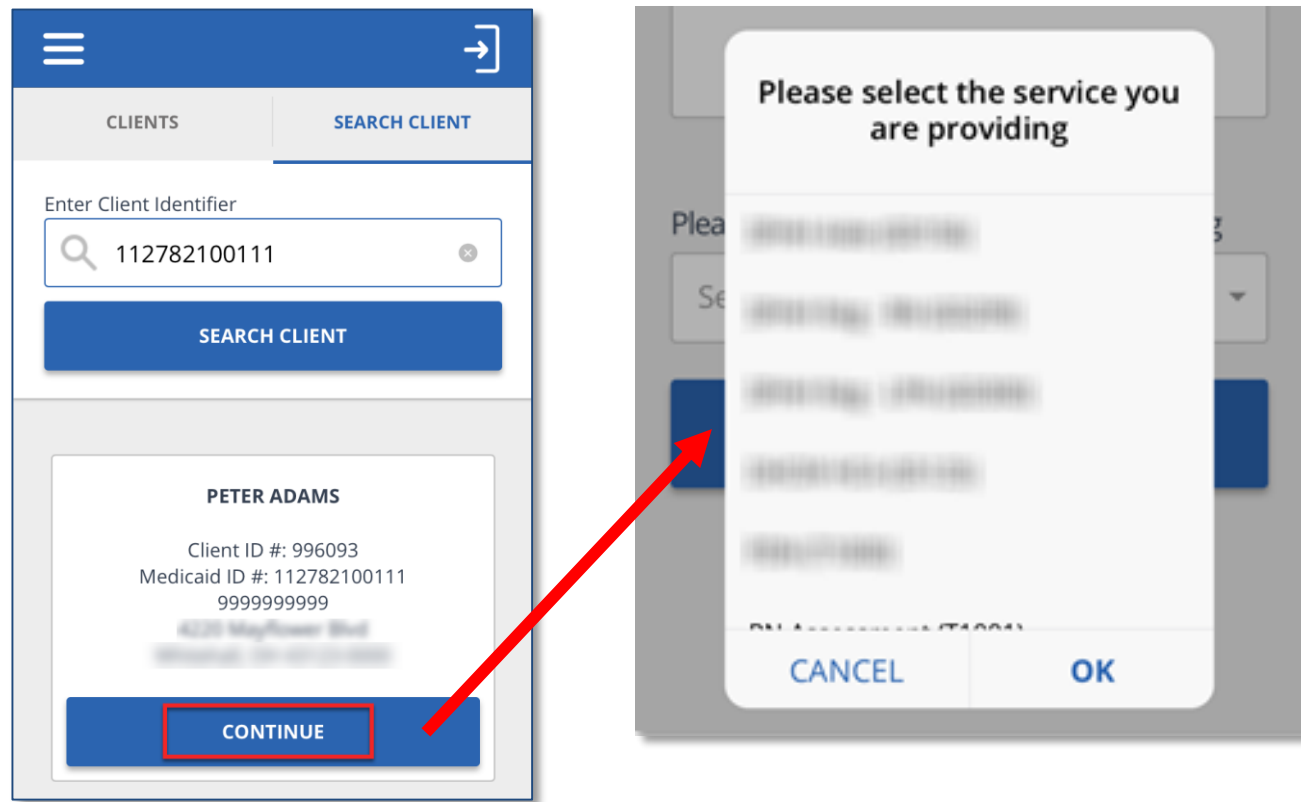
No results found!

Don't have your client's information?

START UNKNOWN VISIT

# STARTING A VISIT

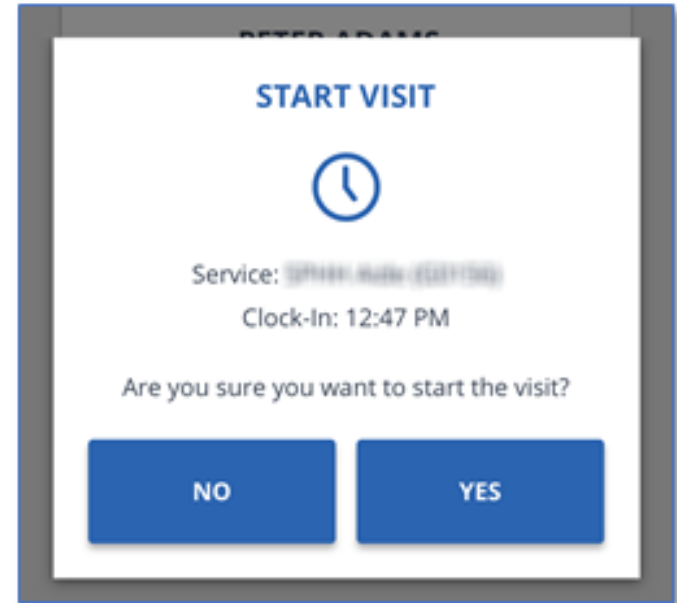
4. Tap the **CONTINUE** button when the search results display.
5. Select the *Service* from the drop-down list.





# STARTING A VISIT

6. Tap the **START VISIT** button. A pop-up screen appears asking the employee to confirm the start of the visit.
7. Log out of SMC and proceed with providing care.



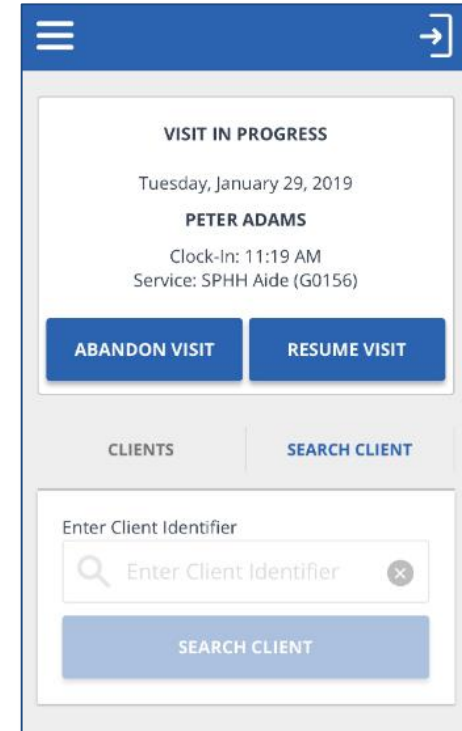
To ensure security, after five (5) minutes of inactivity the employee is automatically logged out of SMC.



# COMPLETING A VISIT

# COMPLETING A VISIT

1. Log in to SMC. The Home screen shows the visit is in progress.
2. Tap **RESUME VISIT** to proceed to complete the visit.



VISIT IN PROGRESS

Tuesday, January 29, 2019

**PETER ADAMS**

Clock-In: 11:19 AM  
Service: SPHH Aide (G0156)

ABANDON VISIT RESUME VISIT

CLIENTS SEARCH CLIENT

Enter Client Identifier

Enter Client Identifier

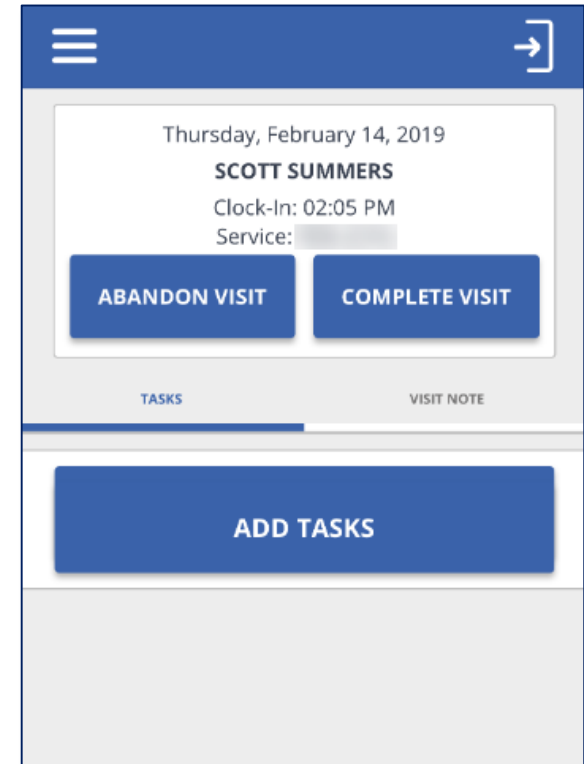
SEARCH CLIENT



The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

# COMPLETING A VISIT

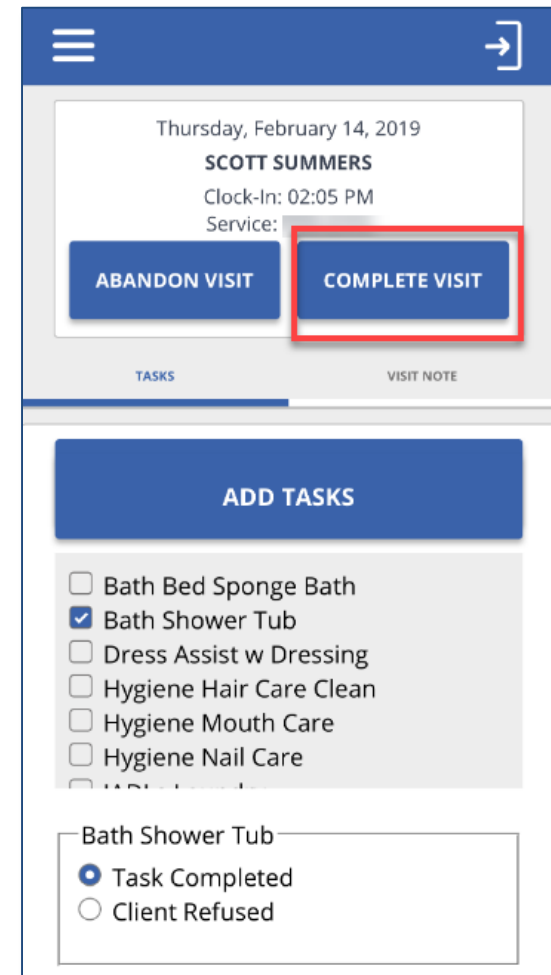
3. Tap **ADD TASKS**. The Task selection screen displays.



Please be aware that notes are not required. This **Visit Note** field should **not** be used to satisfy documentation requirements. This **Visit Note** field should **not** be used to capture any clinical data.

# COMPLETING A VISIT

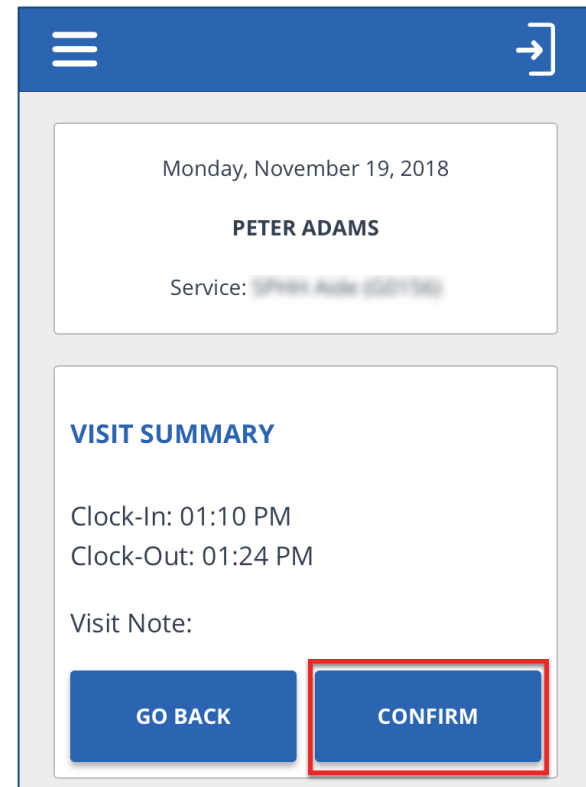
4. Select each task performed for the client.
5. Specify if the task was completed or refused.
6. Tap **COMPLETE VISIT**.



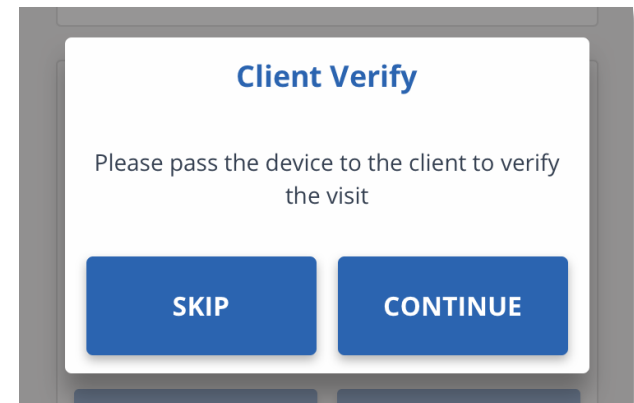
The screenshot shows a mobile application interface for completing a visit. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. Below the header, the date "Thursday, February 14, 2019" is displayed, followed by the name "SCOTT SUMMERS", "Clock-In: 02:05 PM", and "Service:". Below this information are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". The "COMPLETE VISIT" button is highlighted with a red border. Below the buttons are two tabs: "TASKS" and "VISIT NOTE". The "TASKS" tab is active, showing a blue "ADD TASKS" button. Below the button is a list of tasks with checkboxes: "Bath Bed Sponge Bath", "Bath Shower Tub" (checked), "Dress Assist w Dressing", "Hygiene Hair Care Clean", "Hygiene Mouth Care", and "Hygiene Nail Care". Below the list is a section for "Bath Shower Tub" with two radio buttons: "Task Completed" (selected) and "Client Refused".

# COMPLETING A VISIT

7. The *Visit Summary* screen displays.
8. Tap **CONFIRM**.



9. The Client Verify screen displays.
10. Tap **CONTINUE** and pass the device to the client or tap **SKIP**.

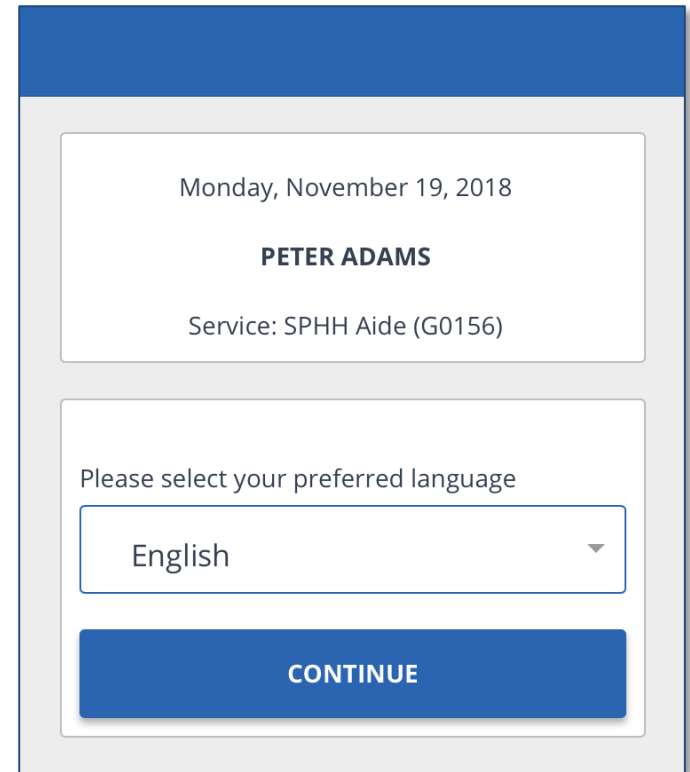


The **SKIP** button allows the in-progress visit to be completed when the client is not willing or able to verify the visit. This visit appears in Sandata EVV as an exception and must be verified in *Visit Maintenance*.

# COMPLETING A VISIT

The following steps are completed by the client:

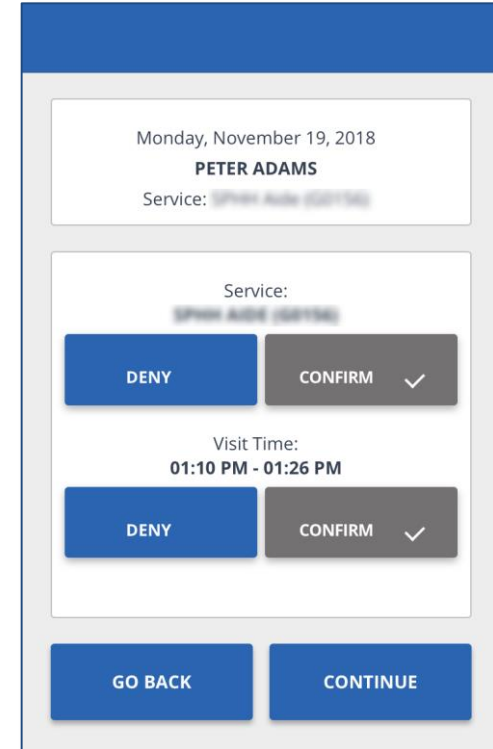
11. Tap on a language in the drop-down field then tap **CONTINUE**.

A screenshot of a mobile application interface. At the top is a blue header bar. Below it is a white card with a light gray border. The card displays the date 'Monday, November 19, 2018', the name 'PETER ADAMS' in bold, and the service 'Service: SPHH Aide (G0156)'. Below this is another white card with a light gray border. It contains the text 'Please select your preferred language' above a drop-down menu. The drop-down menu is currently set to 'English' and has a small downward arrow on the right. Below the drop-down menu is a blue button with the text 'CONTINUE' in white, all-caps.



# COMPLETING A VISIT

12. The Client Confirmation screen displays. The client must tap **CONFIRM** or **DENY** for the Service and Visit Time, then tap **CONTINUE**.



The screenshot shows a mobile application interface for confirming a visit. At the top, it displays the date "Monday, November 19, 2018" and the client's name "PETER ADAMS". Below this, the "Service:" field is shown with a dropdown menu. Underneath, there are two buttons: a blue "DENY" button and a grey "CONFIRM" button with a checkmark. The "Visit Time:" field is also shown with a dropdown menu displaying "01:10 PM - 01:26 PM". Below this, there are again two buttons: a blue "DENY" button and a grey "CONFIRM" button with a checkmark. At the bottom of the screen, there are two large blue buttons: "GO BACK" and "CONTINUE".

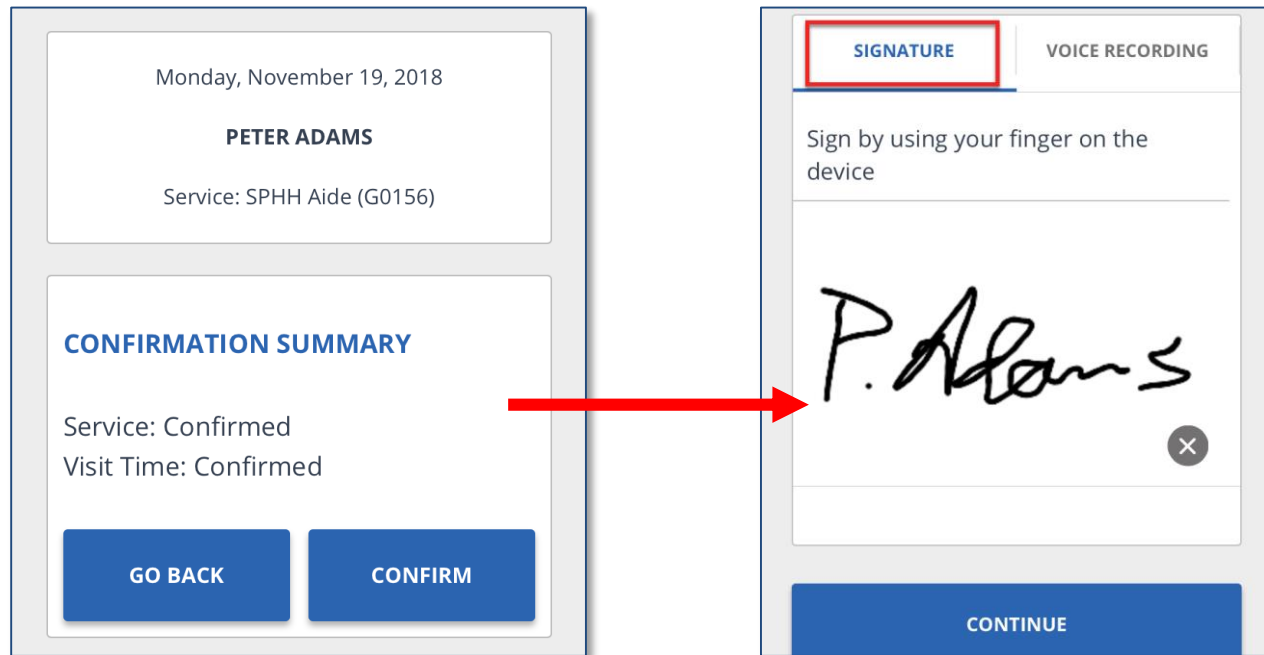


## Client Confirmation

The client cannot bypass the confirmation screen; they must choose **CONFIRM** or **DENY** for each item before the **CONTINUE** button is enabled. If the client taps **DENY** for either item on the visit, a *Visit Verification* exception is created for the visit in Sandata EVV *Visit Maintenance*.

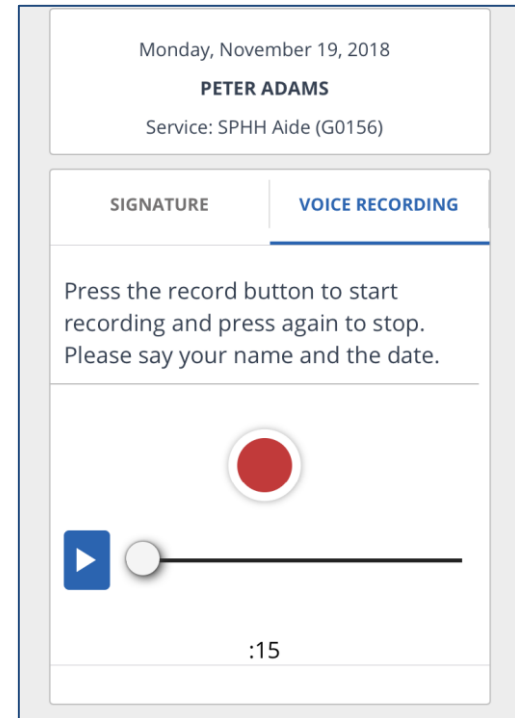
# COMPLETING A VISIT

13. The Confirmation Summary screen displays. Tap **CONFIRM** (Tapping **GO BACK** returns the user to the previous screen).
14. The *Signature/Voice Recording* screen displays. For Signature, sign in the box.



# COMPLETING A VISIT

15. For Voice Recording, tap the circle to record your name and the date. Tap the circle again to end the recording.
16. After signing or recording the voice, tap **CONTINUE**.




Monday, November 19, 2018



**PETER ADAMS**

Service: SPHH Aide (G0156)

SIGNATURE      VOICE RECORDING

Press the record button to start recording and press again to stop. Please say your name and the date.



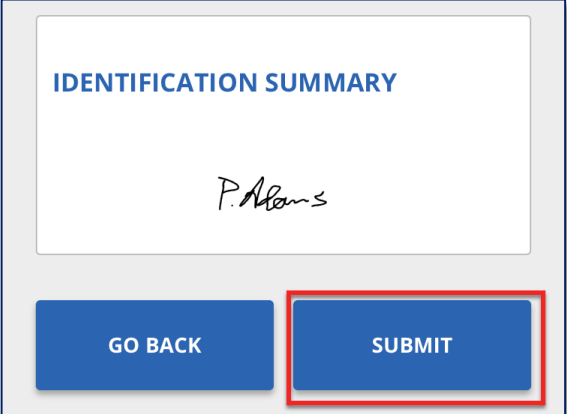
:15



If both voice recording and signature exists, SMC prompts the user to choose which confirmation to associate to the visit. Remember, voice recording is the preferred method of confirmation.

# COMPLETING A VISIT

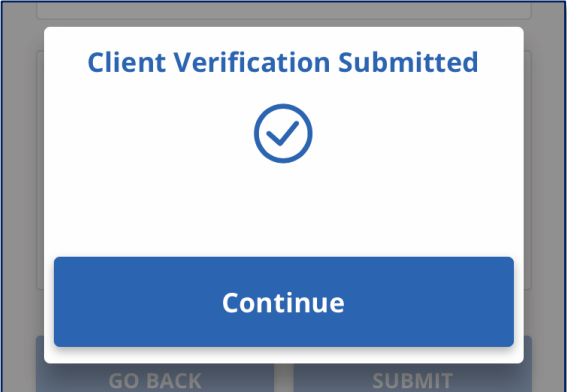
17. For Voice Recording, tap the circle to record your name and the date. Tap the circle again to end the recording.
18. After signing or recording the voice, tap **CONTINUE**.



IDENTIFICATION SUMMARY

*P. Adams*

GO BACK SUBMIT



Client Verification Submitted

✓

Continue

GO BACK SUBMIT



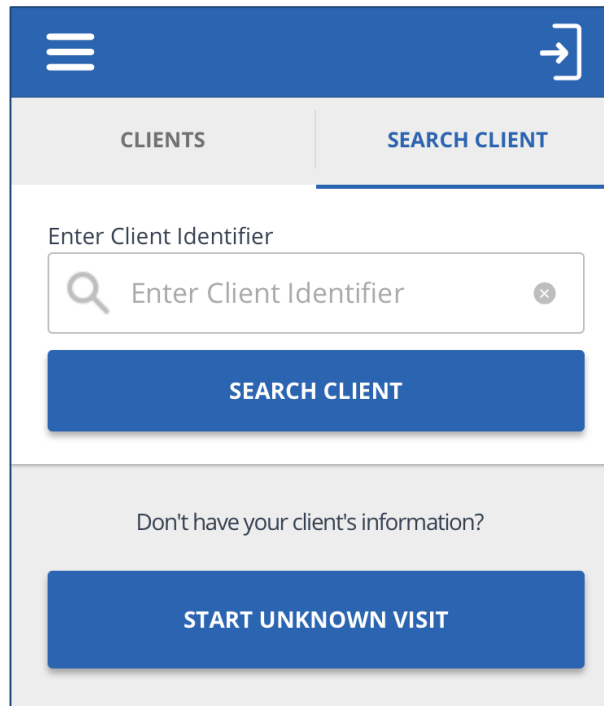
# **STARTING AN UNKNOWN VISIT**

# STARTING AN UNKNOWN VISIT

- ◆ If the Client Identifier entered is not found when trying to start a visit, the employee can start an unknown visit. Unknown visits appear in Sandata EVV as an unknown Client Visit exception and must be fixed in Visit Maintenance.

# STARTING AN UNKNOWN VISIT

1. Log in to MVV
2. Tap **START UNKNOWN VISIT**.



The screenshot shows a mobile application interface with a blue header bar containing a menu icon on the left and a back icon on the right. Below the header, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. The 'SEARCH CLIENT' tab is active. Underneath, there is a text input field labeled 'Enter Client Identifier' with a magnifying glass icon on the left and a clear icon on the right. Below the input field is a blue button labeled 'SEARCH CLIENT'. At the bottom of the screen, there is a grey section with the text 'Don't have your client's information?' and a blue button labeled 'START UNKNOWN VISIT'.

# STARTING AN UNKNOWN VISIT

3. Enter the following information for the client and tap **CONTINUE** (this information is available on the *Memo* screen of the Visit Details in Visit Maintenance).
  - First Name (Required)
  - Last Name (Required)
  - Medicaid ID # (Optional – if available)

### START UNKNOWN VISIT

Please enter the client's name before continuing

FIRST NAME \*

LAST NAME \*

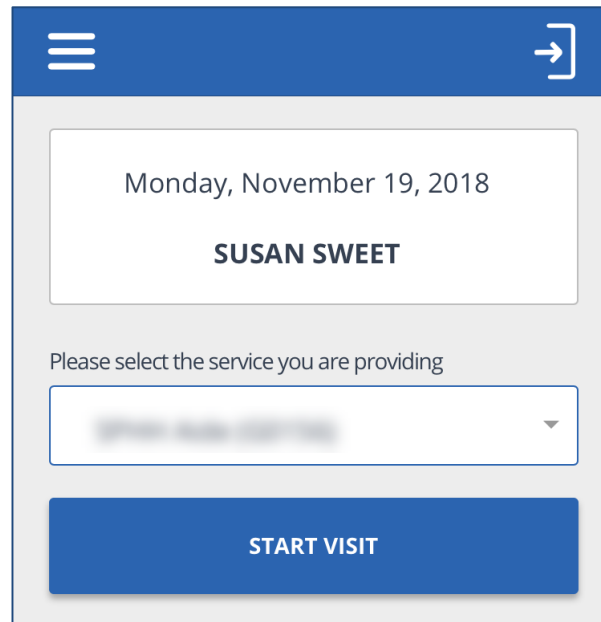
MEDICAID ID #

\*denotes required field

**CANCEL** **CONTINUE**



4. Select the Service from the drop down list and tap **START VISIT**.



The screenshot shows a mobile application interface with a blue header bar containing a menu icon on the left and a right arrow icon on the right. Below the header, a white box displays the date "Monday, November 19, 2018" and the name "SUSAN SWEET" in bold. Below this, the text "Please select the service you are providing" is followed by a blurred dropdown menu. At the bottom of the form is a large blue button labeled "START VISIT".

# STARTING AN UNKNOWN VISIT

5. Tap **YES** to confirm the start of the visit. A pop-up displays asking the employee to confirm the start of visit.
6. The visit is completed following the same process used when completing a visit for a known client.
7. Log out of the SMC app.

