



Sandata Mobile Connect Guide

An Employee's guide on how to use the Sandata Mobile Connect App. (SMC)

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What is Sandata Mobile Connect (SMC)

- The Sandata Mobile Connect app., also referred to as SMC is a software application that runs on a mobile device such as a smartphone or tablet. This means employees can download the mobile app. to their smartphone or tablet and use it to record details about the services they provided during a visit. If the employee does not have a mobile device, they can use the Fixed Visit Verification method (FVV).

NOTE: FVV may not be applicable to your program.

The Roles in SMC

- **Employee** = The person providing care.
 - Clocks in and out using either the client's phone, Sandata's Mobile Connect App. or a Fixed Visit Verification device. Check with your program to know which is used and preferred.
- **Client** = The person receiving care.
 - Will use the EVV website to edit and approve visits.
- **Designee** = A Client's representative
 - A person designated to handle the client's responsibilities when they are unable to do so.

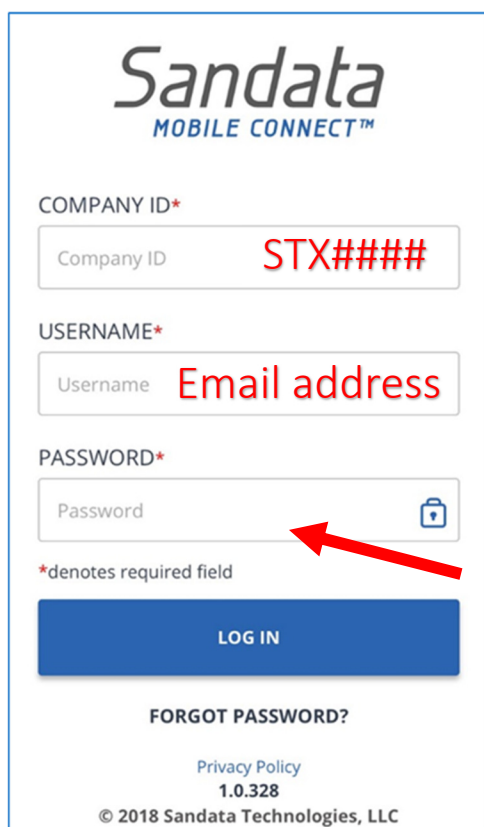
Setting up the SMC app.

Refer to the “How to Download the SMC Mobile app.” quick reference page to learn how to install the SMC app. on your mobile device. Both iOS and Android versions are available.

- Install the SMC mobile app. on your smartphone or tablet
- Tap the SMC icon to launch the mobile app.



Your login credentials will be provided to you. After opening the app for the first time, you'll need to enter the following required information;

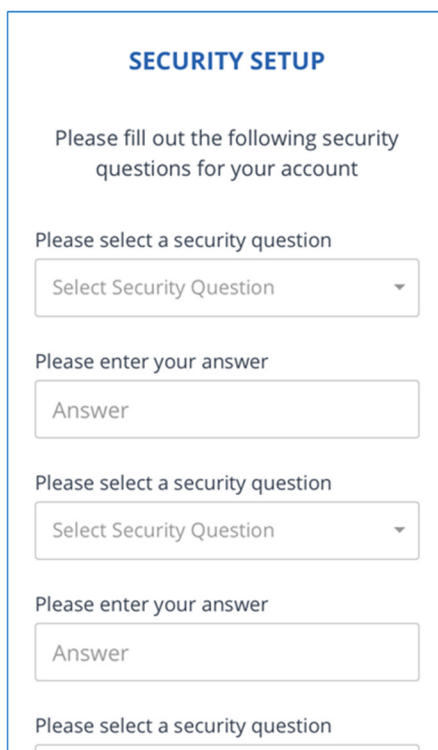
The login screen for Sandata Mobile Connect. It features the Sandata logo at the top. Below it are three input fields: 'COMPANY ID*' with a placeholder 'Company ID' and a red 'STX####' value; 'USERNAME*' with a placeholder 'Username' and a red 'Email address' value; and 'PASSWORD*' with a placeholder 'Password' and a red arrow pointing to it. A red arrow also points to the 'PASSWORD*' label. Below the fields is a blue 'LOG IN' button. At the bottom, there is a 'FORGOT PASSWORD?' link, a 'Privacy Policy' link, the version '1.0.328', and the copyright '© 2018 Sandata Technologies, LLC'. A small note '*denotes required field' is located between the username and password fields.

PASSWORD

The temporary password you received in email

Setting up Security Questions

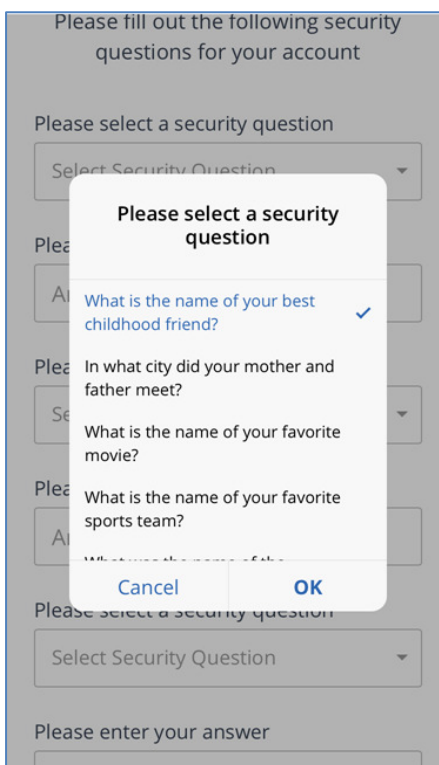
You will need to select and answer several security questions the first time you log in.



The screenshot shows a 'SECURITY SETUP' form. It contains three identical sections. Each section starts with the instruction 'Please fill out the following security questions for your account'. The first section is followed by 'Please select a security question' and a dropdown menu labeled 'Select Security Question'. Below this is 'Please enter your answer' and a text input field labeled 'Answer'. The second and third sections follow the same pattern.

Your answers should be...

- Be easy to remember
- Not be easily guessed
- Not change over time



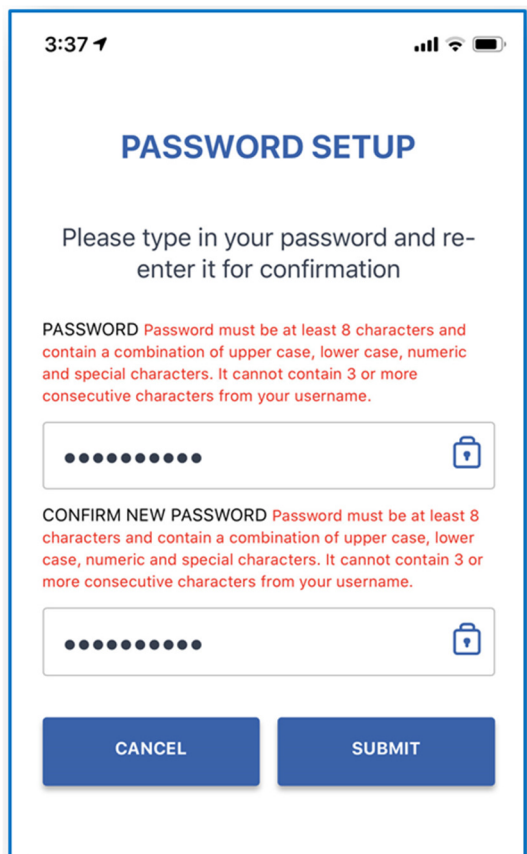
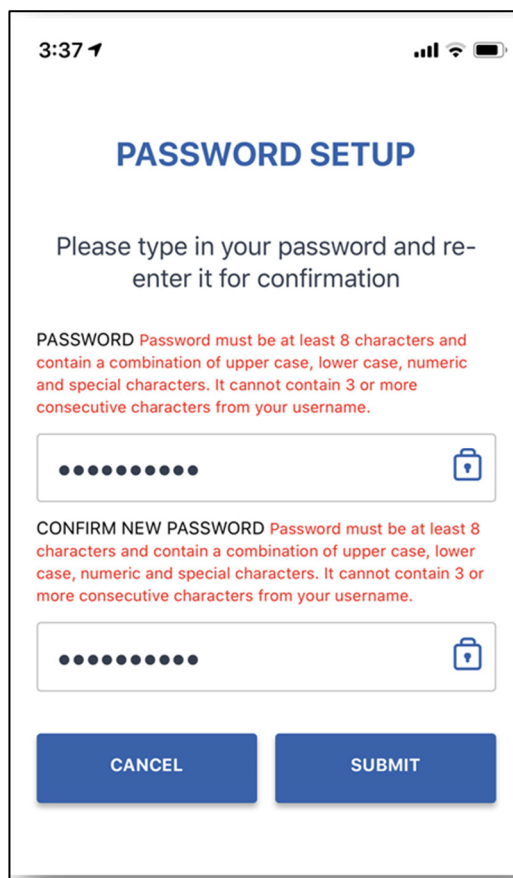
This screenshot shows a modal dialog titled 'Please select a security question'. It lists four options: 'What is the name of your best childhood friend?' (which is selected with a blue checkmark), 'In what city did your mother and father meet?', 'What is the name of your favorite movie?', and 'What is the name of your favorite sports team?'. At the bottom of the dialog are 'Cancel' and 'OK' buttons. The background shows a blurred view of the security setup form.

Setting Up Your Password

Passwords MUST have:

- At least 1 upper case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 special character (@#\$%^)
- Be at least 12 characters long

Example: Password2020!

- Enter and re-enter a new password
- Tap **SUBMIT**

NOTE: Passwords are case sensitive

Using the Menu Bar

The menu bar is displayed at the top of the mobile app.

1 Tap here for the **menu**

2 Tap here to **log out**



Menu Bar Options

My Visits – Displays visits

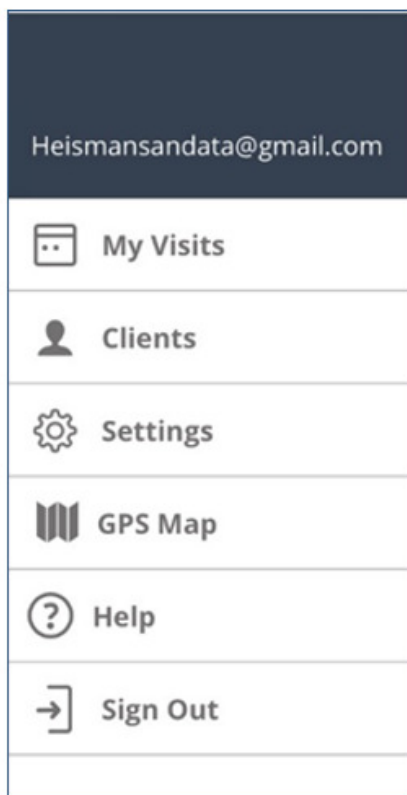
Clients – Displays the client screen

Setting – Displays the settings screen

GPS – Displays a map with a pin at location

Help – Displays the help screen

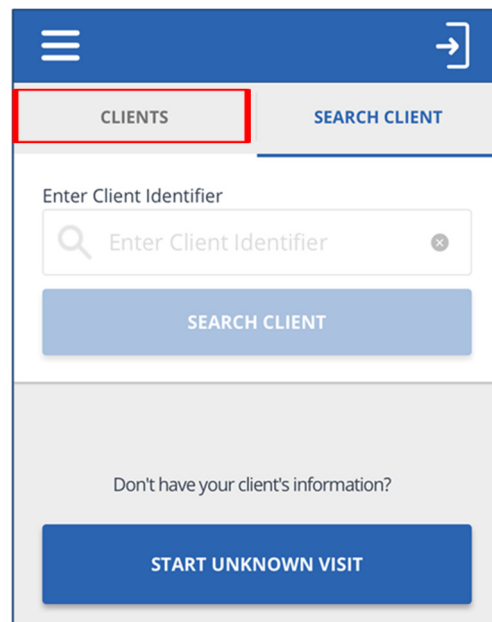
Sign out – Logs out of the app and displays the login screen.



Starting a Visit

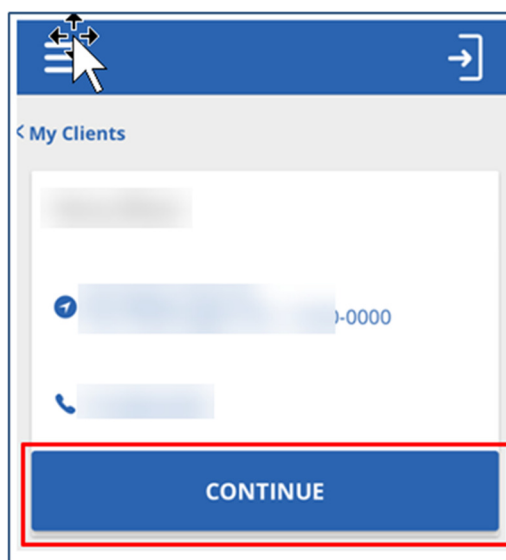
Upon logging in to Sandata Mobile Connect, you will be presented with a list of clients that you provide care to under the **Clients** tab.

If you need to start a visit for a client that ***is not*** yet linked to your account, you should follow the steps to “Start an Unknown Visit” (page 9)

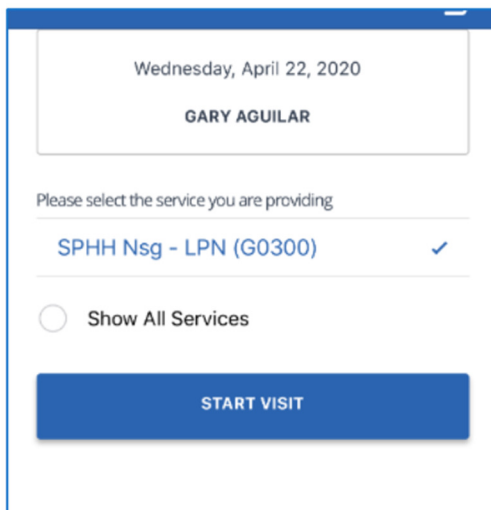
Start a visit from the **My Clients** screen

- Tap a client from the list to start a visit
Check to make sure the right client displays

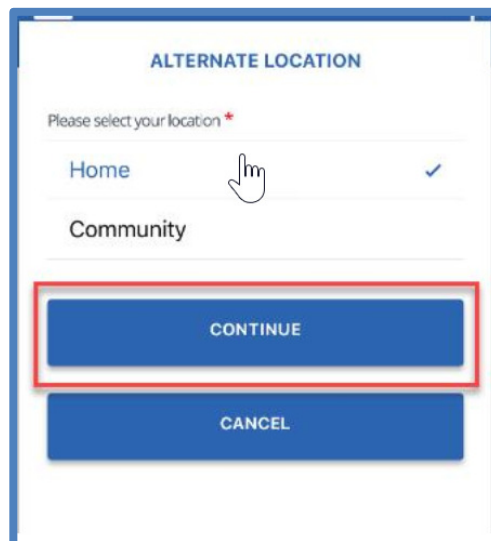


Tap **CONTINUE**

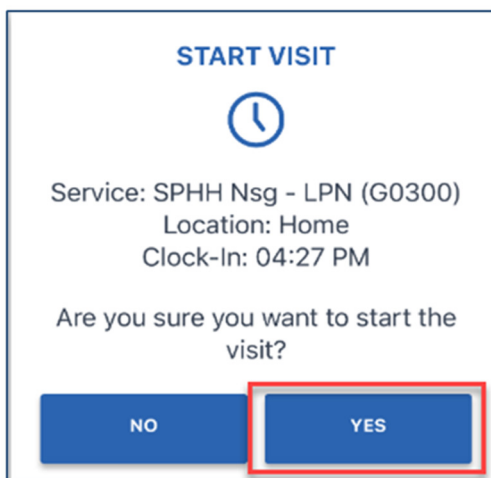
- Tap the **Service** to select
- Tap **START VISIT**



- Select a location
NOTE: *The Location step may not be applicable to your program.*



- Tap **CONTINUE**



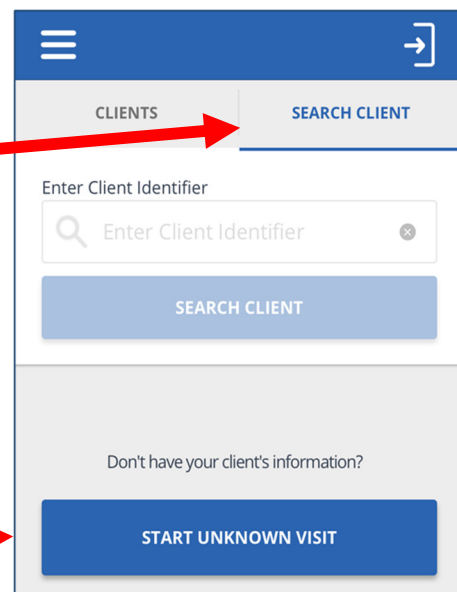
- Tap **YES** to start the visit

Starting an Unknown Visit

You may need to start a visit for a client whose name doesn't appear in the client's tab. This is known as **"STARTING AN UNKNOWN VISIT"**.

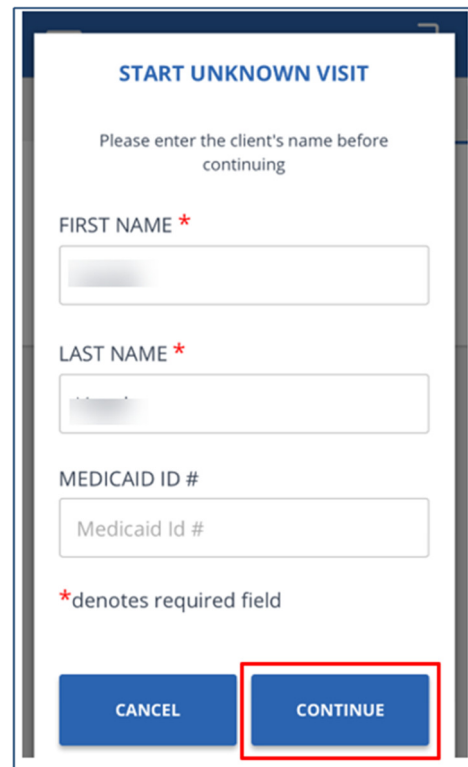
The **SEARCH CLIENT** tab is disabled since the employee only has access to their assign client(s).

Tap **START UNKNOWN VISIT** to start a visit for a client whose name is not listed in the Clients tab.

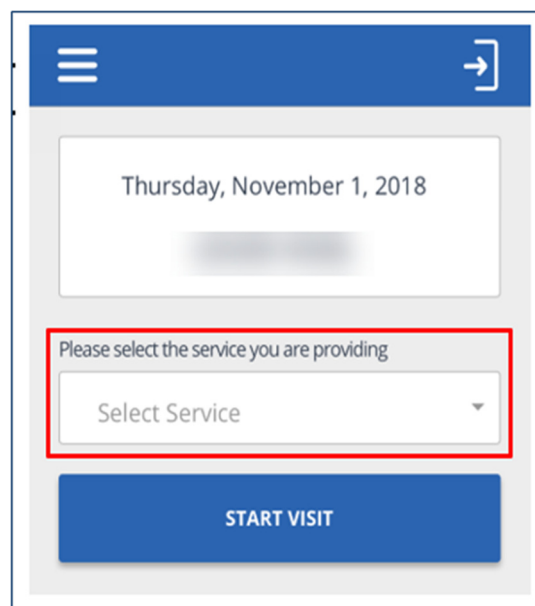


Enter the clients **FIRST NAME** and **LAST NAME**
Asterisks * mean these are required fields.

- Tap **CONTINUE**



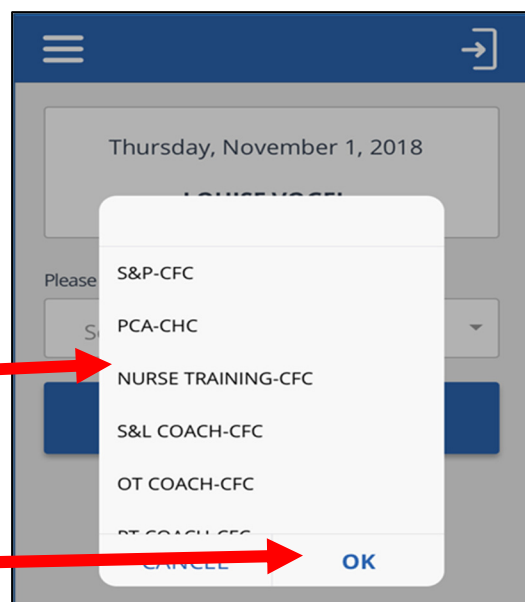
Tap the **Select Service** field and tap a **service** from the list.



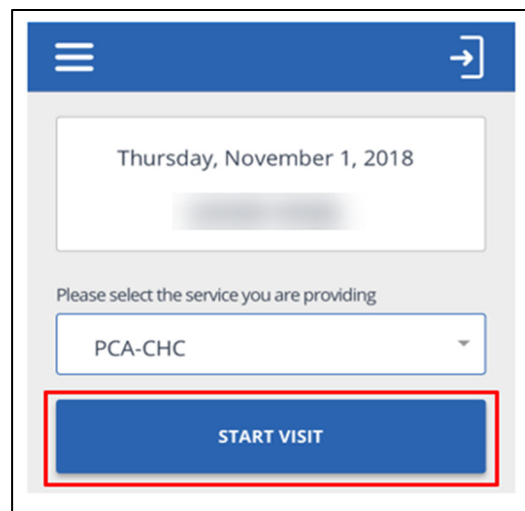
There might only be **one** service to select.

- Tap **SERVICE**

- Tap **OK**



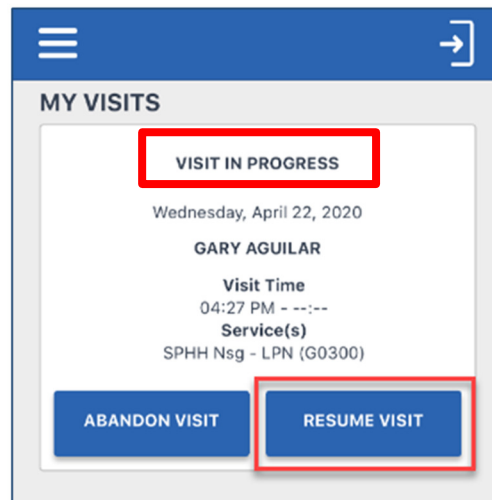
- Tap **START VISIT**



Completing a Visit

- Log into the SMC mobile app.
- If a visit is in progress, it will display.

- Tap **RESUME VISIT**

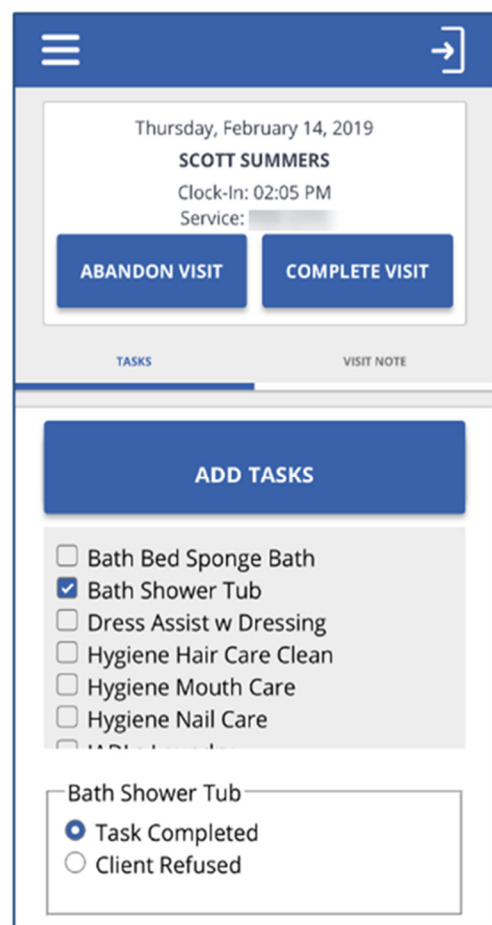


- Tap the task(s) performed from the task list.

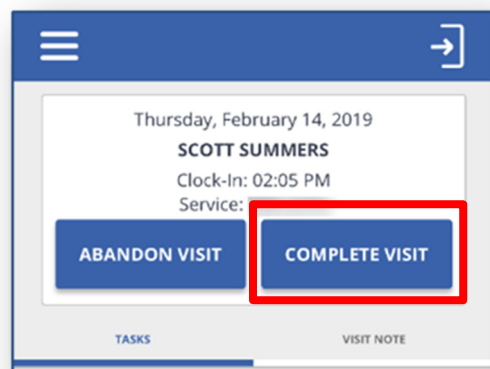
NOTE: *Tasks may not be applicable to your program.*

- Selected the task(s) performed and then tap either “Task Completed” or “Client Refused”.

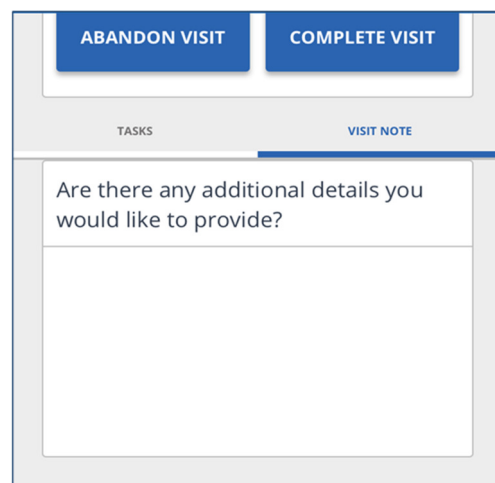
- Tap **ADD TASKS** to close the tasks list.



- Tap **COMPLETE VISIT**

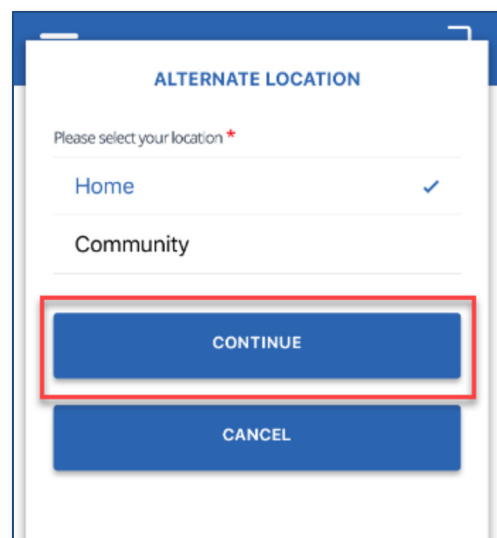


- Tap the **VISIT NOTE** tab
- Using the keyboard on your mobile device, enter notes about the visit.
- Visit notes are optional and are not required. **DO NOT** use visit notes for any medical documented information.

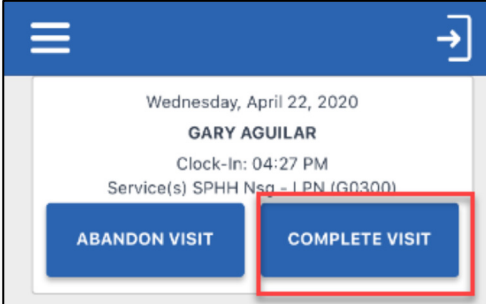


- Select the **Location**
- NOTE:** *The Location step may not be applicable to your program.*

- Tap **CONTINUE**



- Tap **COMPLETE VISIT**



Wednesday, April 22, 2020

GARY AGUILAR

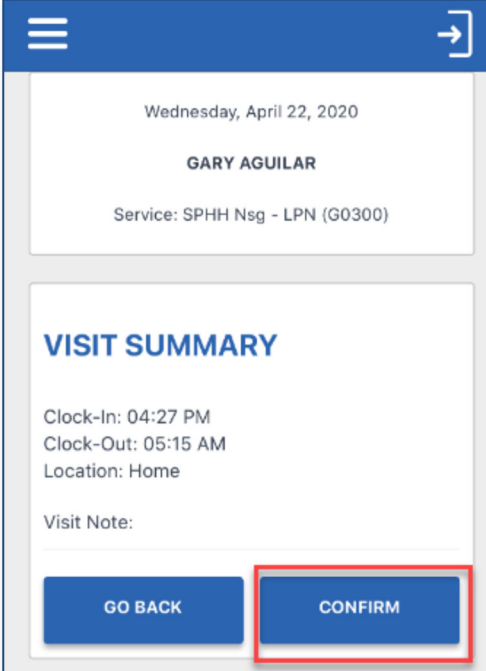
Clock-In: 04:27 PM

Service(s) SPHH Nsg - LPN (G0300)

ABANDON VISIT

COMPLETE VISIT

- Tap **CONFIRM**



Wednesday, April 22, 2020

GARY AGUILAR

Service: SPHH Nsg - LPN (G0300)

VISIT SUMMARY

Clock-In: 04:27 PM

Clock-Out: 05:15 AM

Location: Home

Visit Note:

GO BACK

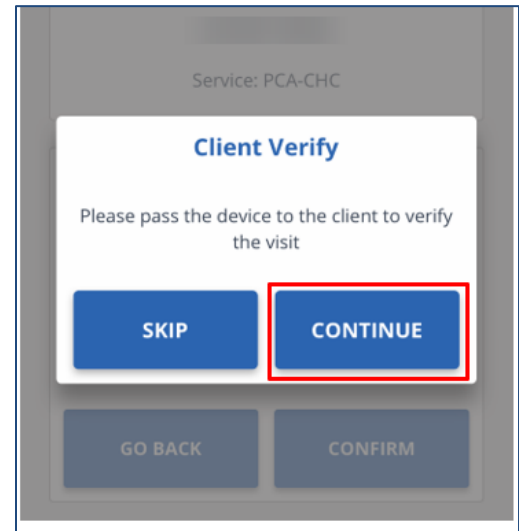
CONFIRM

Client Verification

This option may or may not be required in your program.

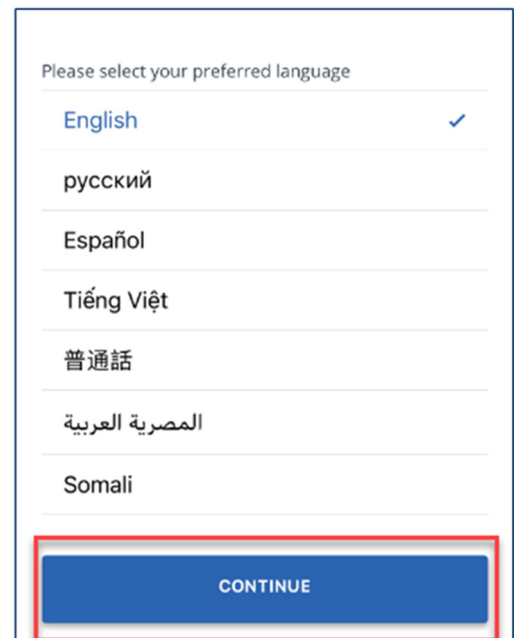
- Tap **CONTINUE** and pass the mobile device to the client to verify the visit.

***NOTE:** If the client is unable to verify*



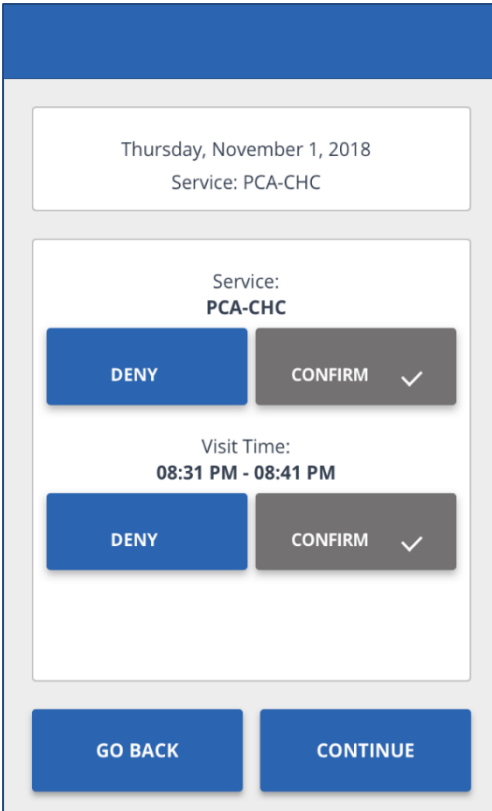
- The client will tap the **language** field and select a language.

***NOTE:** English may be the only language in the list.*



- Client taps **CONFIRM** or **DENY** to approve or reject **Service(s)** and **Visit Time**.
- If client taps **CONFIRM**, it means they agree the visit start and end times and service(s) were performed.
- If they tap **DENY**, it means they do not agree the visit start and end times or the service(s) that were performed.

- Tap **CONTINUE**



Thursday, November 1, 2018
Service: PCA-CHC

Service:
PCA-CHC

DENY CONFIRM ✓

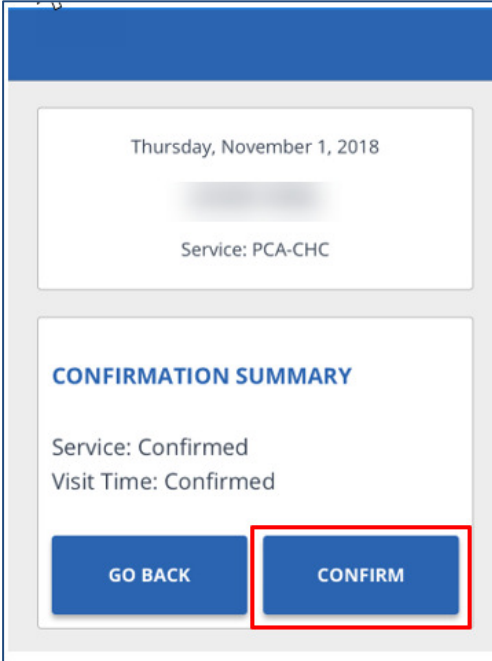
Visit Time:
08:31 PM - 08:41 PM

DENY CONFIRM ✓

GO BACK CONTINUE

NOTE: *If a client **DENIES** either (or both) **SERVICE(s)** or **VIST TIME**, you will still be able to complete the visit, however, the visit will show “Exception(s)” and need to be fixed in EVV.*

- Tap **CONFIRM**




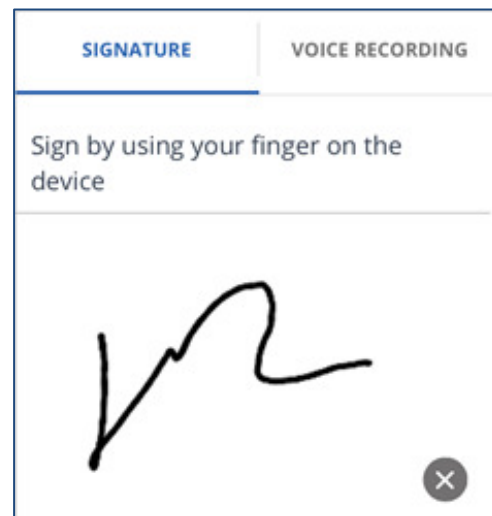
Thursday, November 1, 2018
Service: PCA-CHC

CONFIRMATION SUMMARY

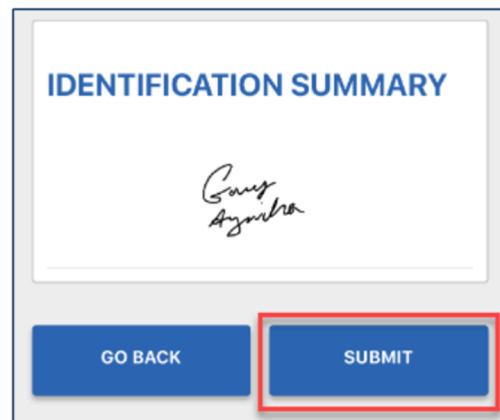
Service: Confirmed
Visit Time: Confirmed



GO BACK CONFIRM

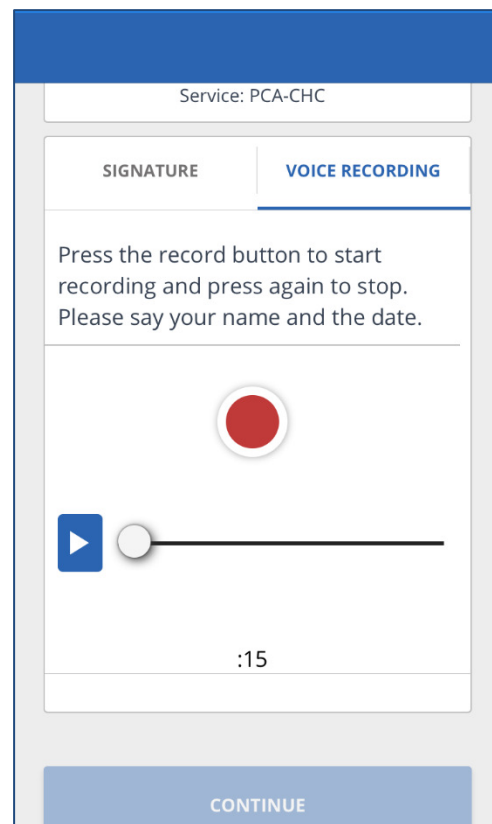
- Client will tap either **SIGNATURE** or **VOICE RECORDING**.
- Using **SIGNATURE**, they will sign the device using a finger and tap **CONTINUE**.
- Tap  to clear the signature field and sign again




- Tap **SUBMIT** (Signature Confirmation)

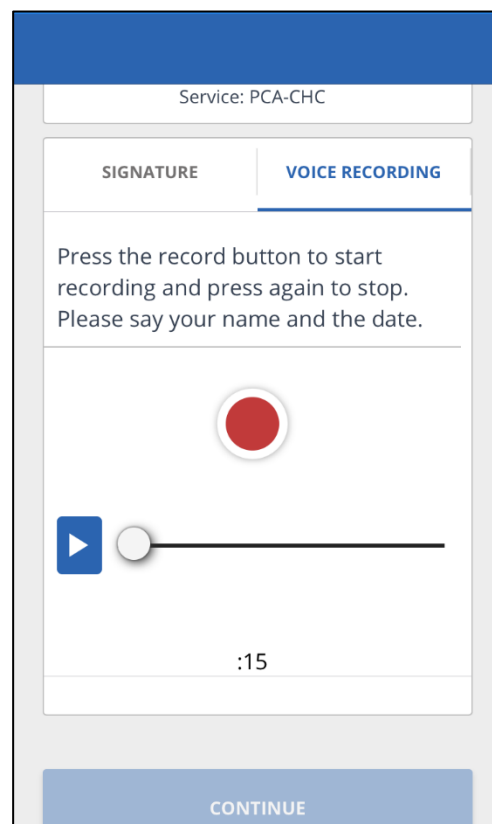


- If they tap **VOICE RECORDING**, tap the Record  icon.
- If asked, tap **OK** to allow the mobile app. to access the microphone
- Tap the Record  icon to stop the recording

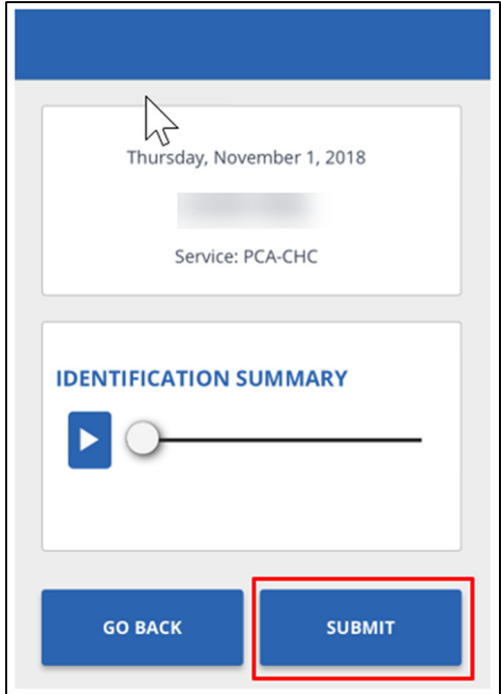


- Voice recordings can be a maximum of 15 seconds

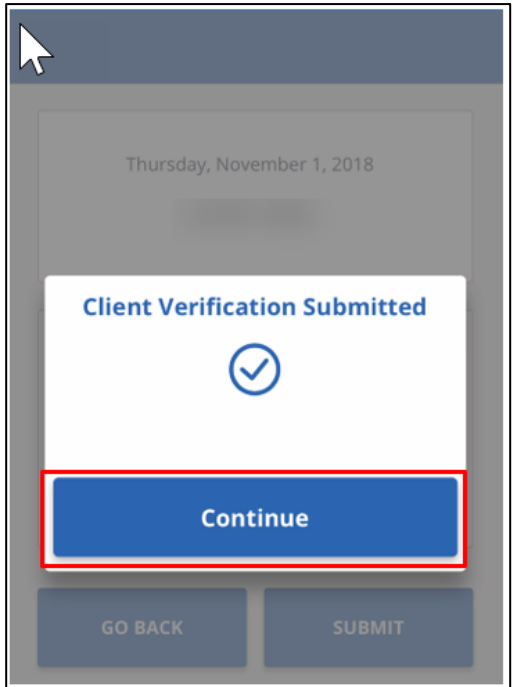
- Tap the Play  icon to play the recorded audio



- Tap **SUBMIT** (Voice Confirmation)



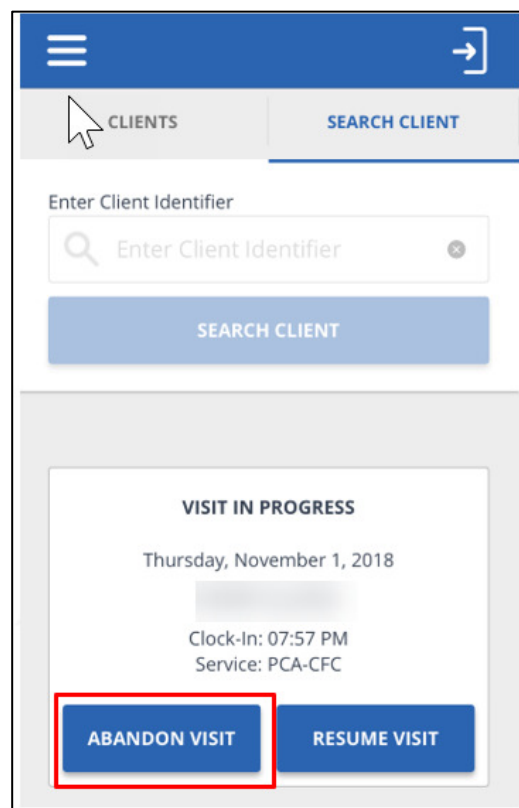
- Tap **CONTINUE**



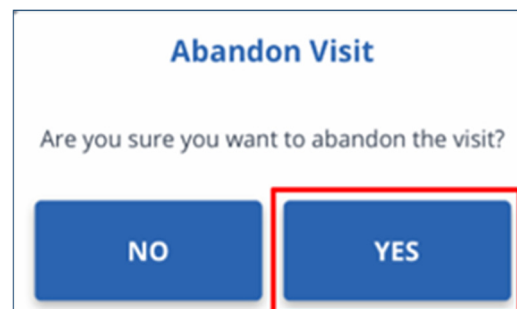
Abandoning a Visit

- There may be situations when you must cancel a visit that you started.
- For example, if you forgot or were unable to check out at the end of a visit and you need to start a new visit for another client.

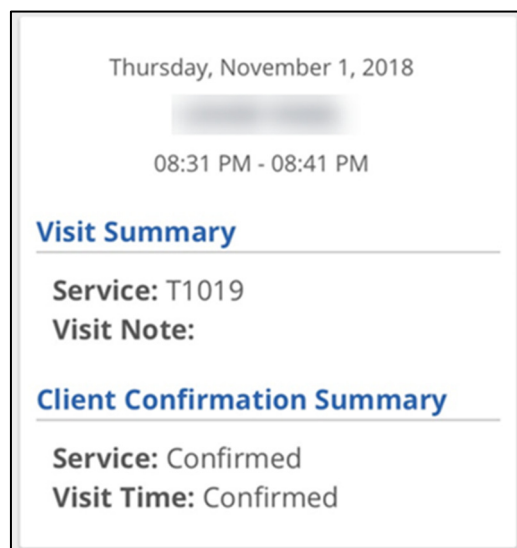
- Tap **ABANDON VISIT**




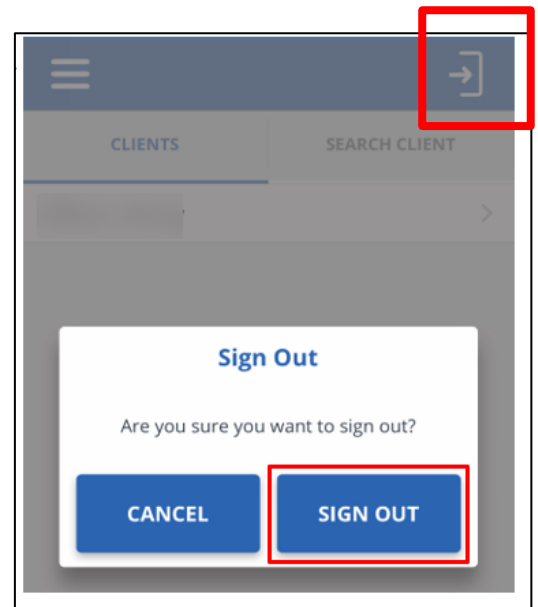
- Tap **YES**



- View past visits from the **My Visits** screen
- Tap a visit to view details about the visit



- Tap the sign out icon  located at the top of the screen in the menu bar.
- A sign out pop-up displays.
- Tap **SIGN OUT** and you will be logged out of the mobile app.



NOTE: An Abandoned Visit will show as an exception and need to be fixed/acknowledged in EVV's Visit Maintenance.

Using SMC in an Offline Mode

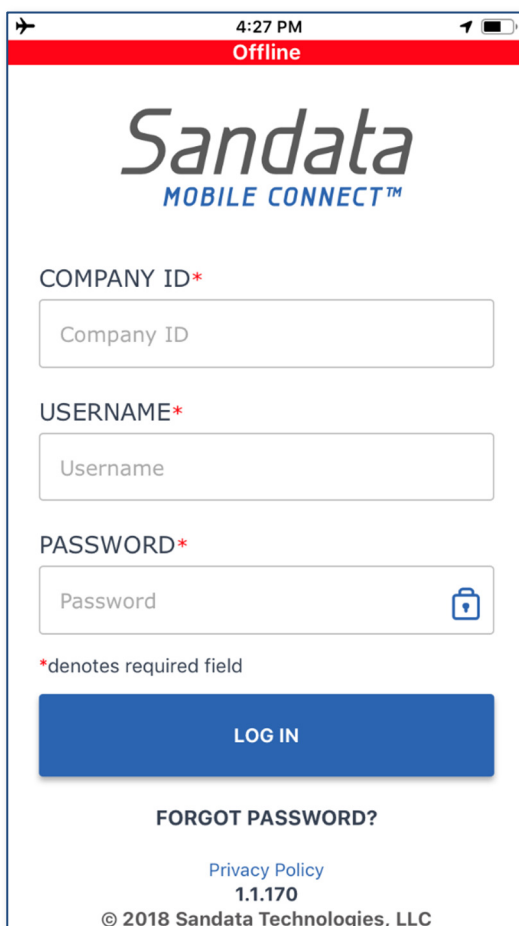
When an employee provides care in an area that does not have cellular or wi-fi service, the employee can still use Sandata Mobile Connect in an offline mode to check-in/check-out for their scheduled visit or start an Unknown Visit.



A red banner appears across the top of the screen when SMC is running in offline mode.

Logging in to SMC Offline

When opening SMC without a cellular or wi-fi connection, the login screen shows in red at the top of the screen that the app is Offline.



4:27 PM
Offline

Sandata
MOBILE CONNECT™

COMPANY ID*

Company ID

USERNAME*

Username

PASSWORD*

Password

*denotes required field

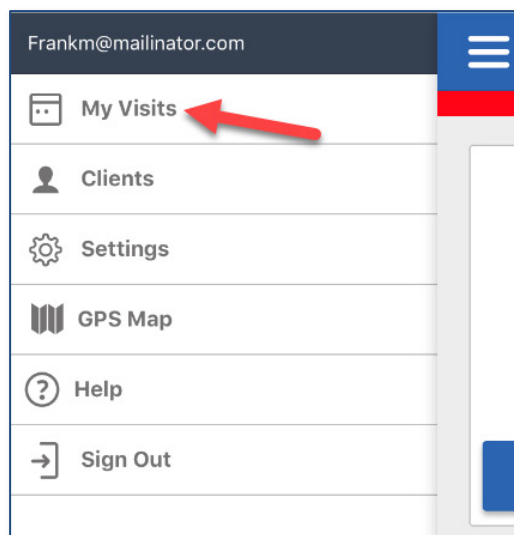
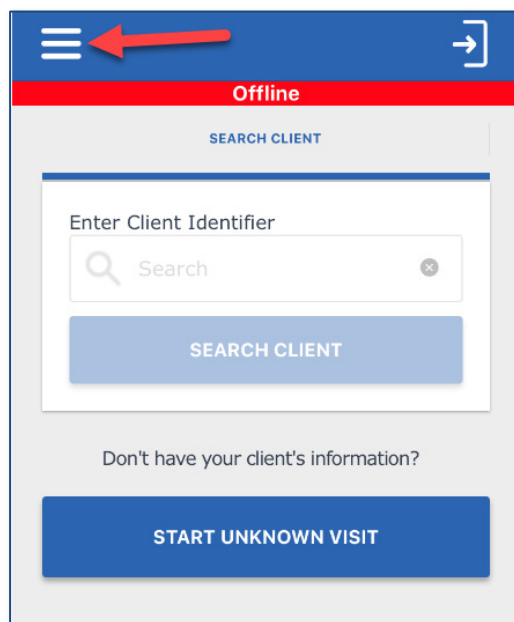
LOG IN

FORGOT PASSWORD?

[Privacy Policy](#)
1.1.170
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Starting a Scheduled Visit Offline

1. Tap on the menu icon in the upper-left corner of the home screen and tap **My Visits** to start a scheduled visit.



The scheduled visits displayed are as of the last time the employee logged in to SMC in a connected mode. Changes to schedules or new schedules for the employee are not available when SMC is offline.