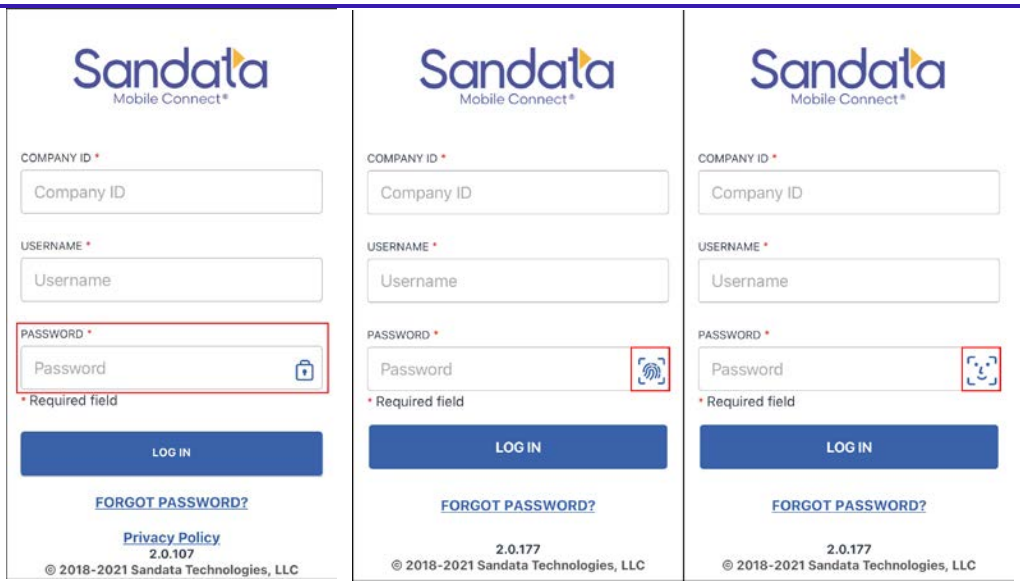
Sandata Mobile Connect (SMC): Starting a Group Visit

Logging into SMC

1. Tap the Sandata Mobile Connect icon ( ) to launch the application.
2. Enter log-in credentials:
   A. **COMPANY ID** -
      i. For Sandata Electronic Visit Verification users = 2- followed by account number. Example 2-##### (##### = account number)
   B. **USERNAME** - Username credentials will change based on agency configuration.
      i. The employee's Username.
   C. **PASSWORD** - Password credentials will change based on agency configuration.
      i. Type in your password.
      ii. **Touch ID** (iOS) / **Fingerprint** (Android)( ). Place your finger on the device's fingerprint scanner.
      iii. **Face ID** (iOS Only) ( ). Allow the device's front camera to scan your face.

Note:
Remember, to log in using Biometrics functionality, users must enable and register biometric data on their mobile devices. If Biometric login is not available, check the device settings.



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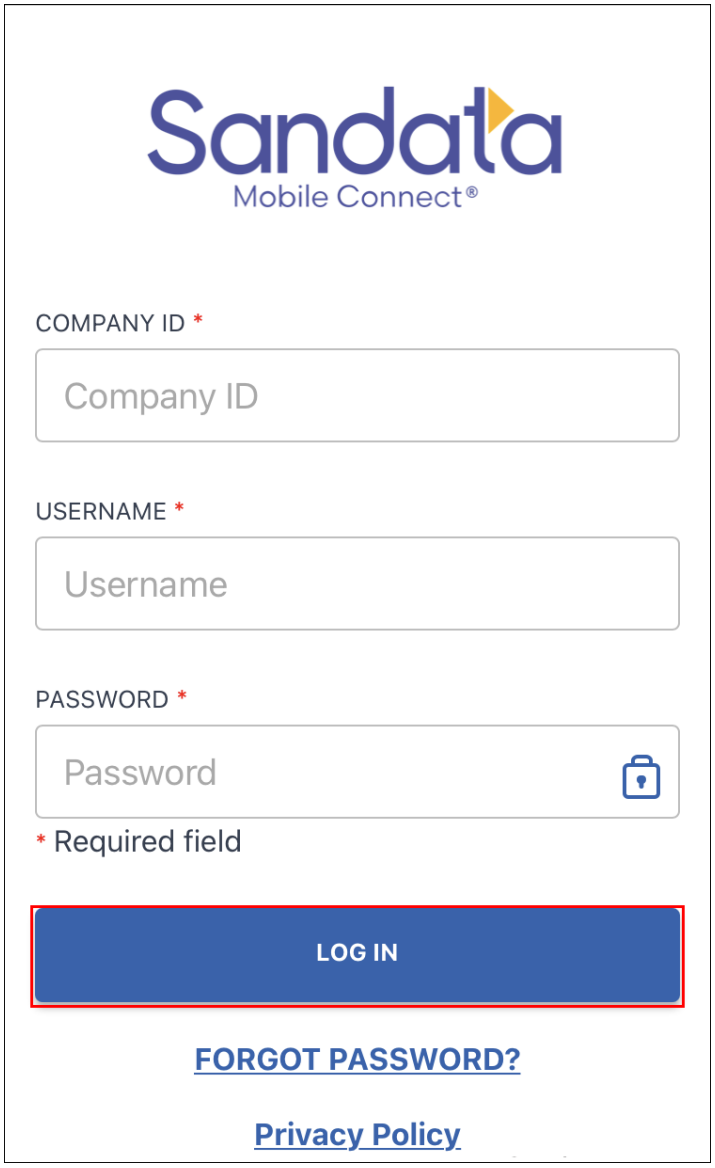
3. Tap **LOG IN**.



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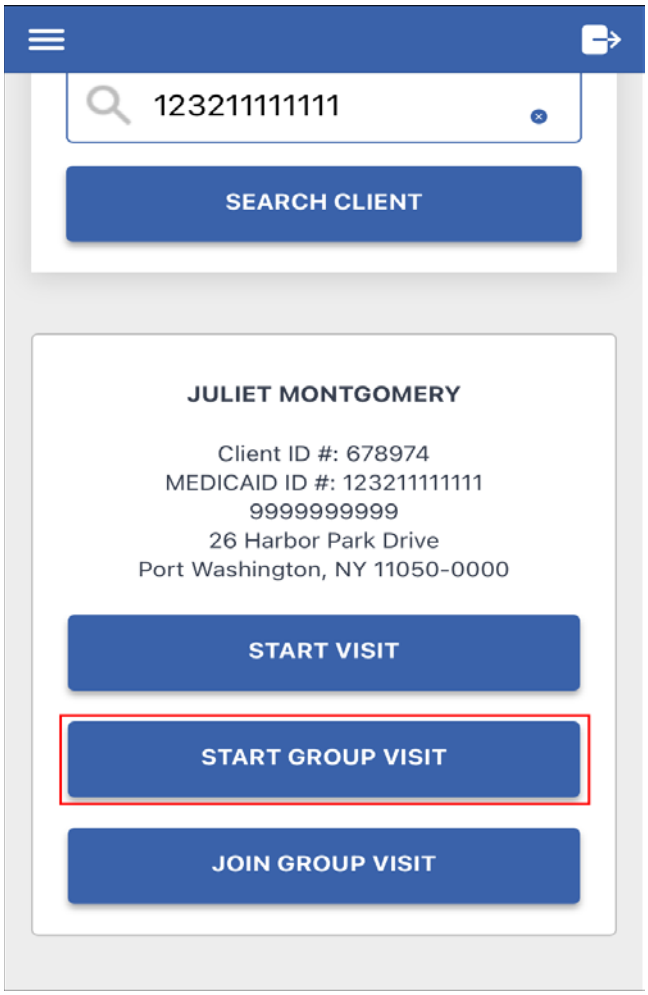
Starting a Group Visit from the Search Client Tab (Known Client)

1. Navigate to the **SEARCH CLIENT** tab and follow the instructions to start a visit.
2. Tap the **Enter Client Identifier** field, enter search criteria.
   Enter the full, 10-digit Medicaid ID or the Client ID to find the client.

> **Note:**
> If you do not have the client Medicaid ID or the Client ID, contact your Agency.

3. Tap **SEARCH CLIENT**.
4. Tap **START GROUP VISIT**.



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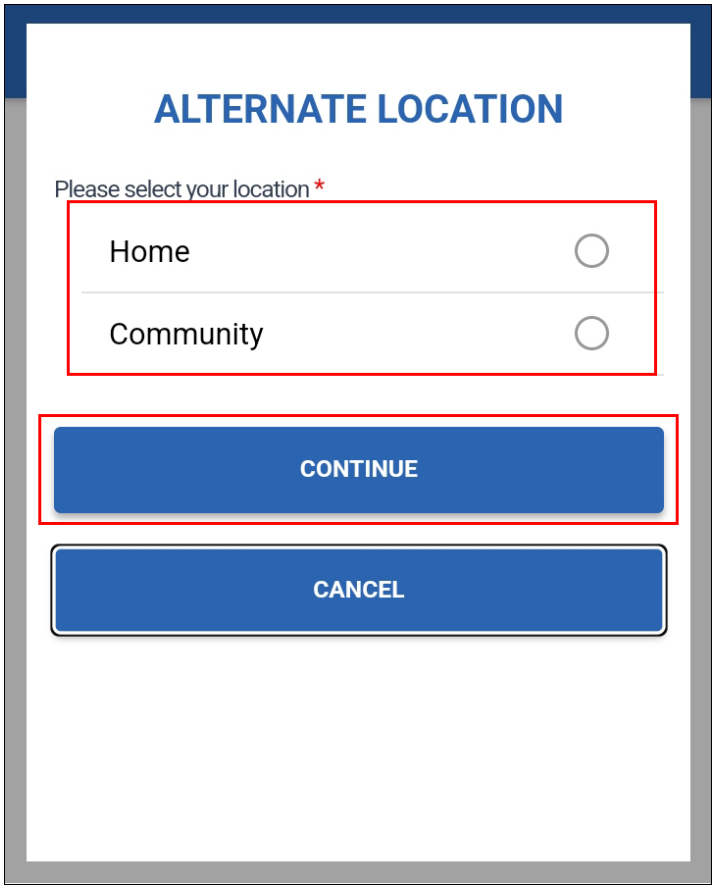
5. Select **Home** or **Community**.
6. Tap **CONTINUE**.
   This records the visit's location and continues the call in or call out process.



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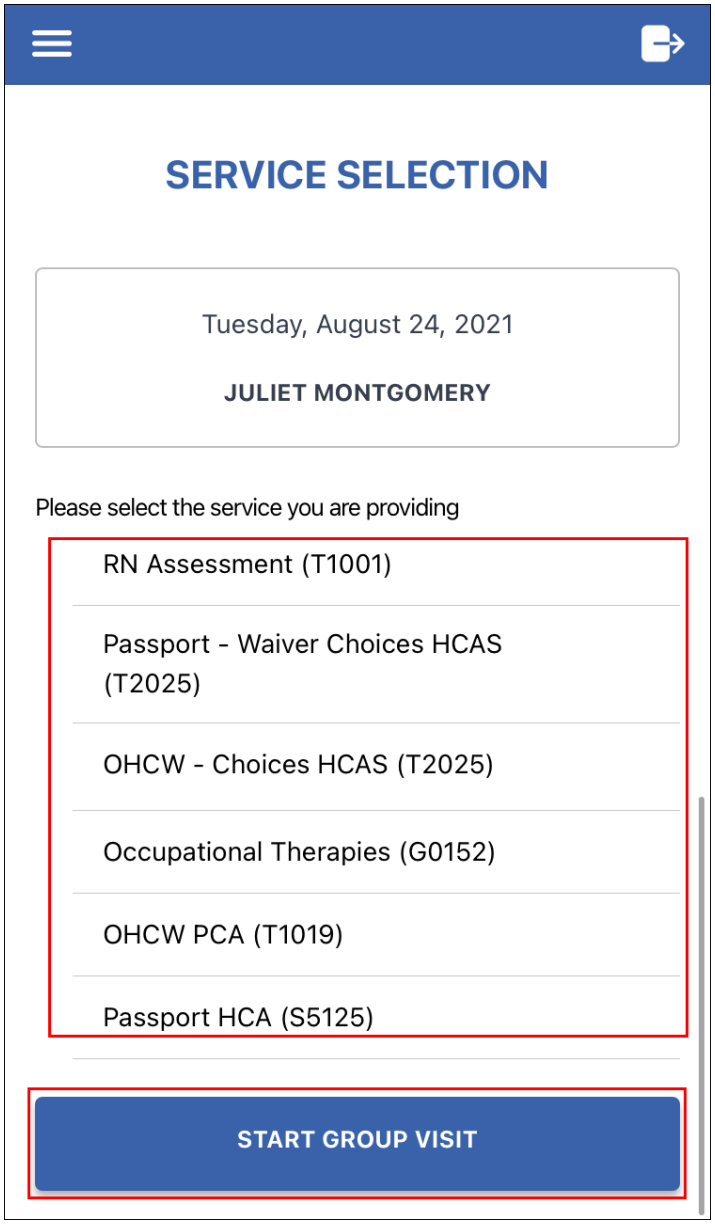
7. Select a service.
   Use your finger to scroll through the list of services.
8. Tap **START GROUP VISIT**.



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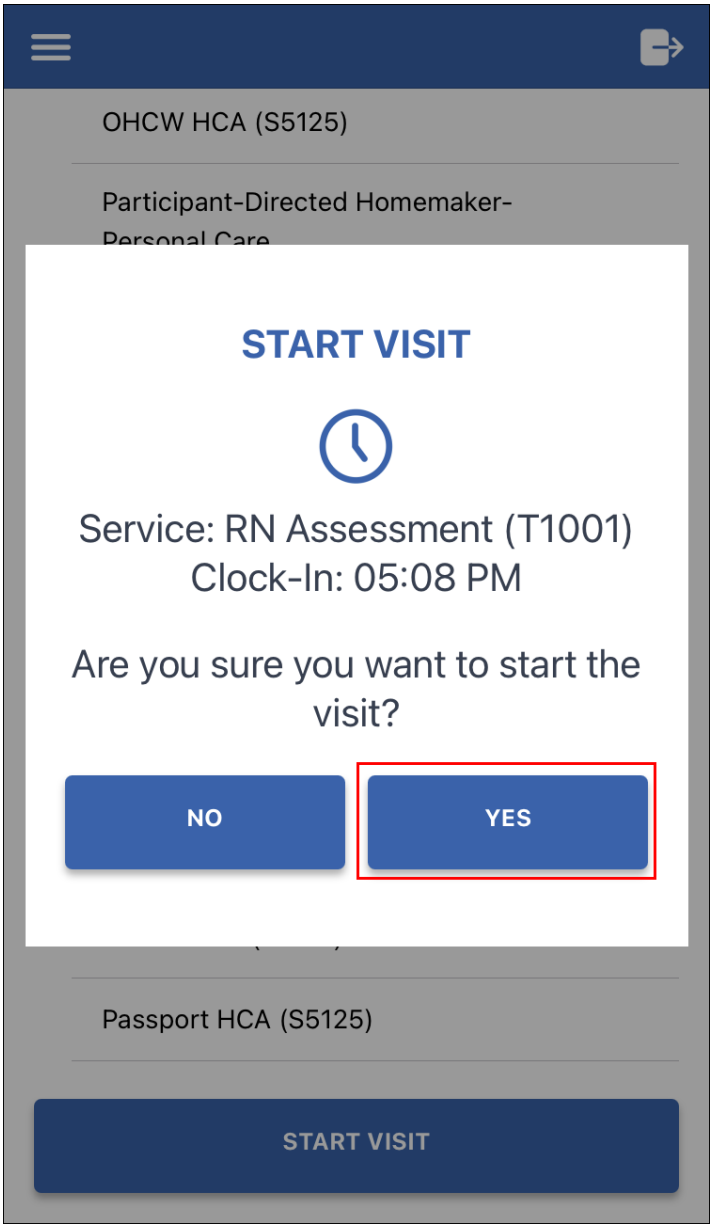
9. Tap **YES** to start the visit.



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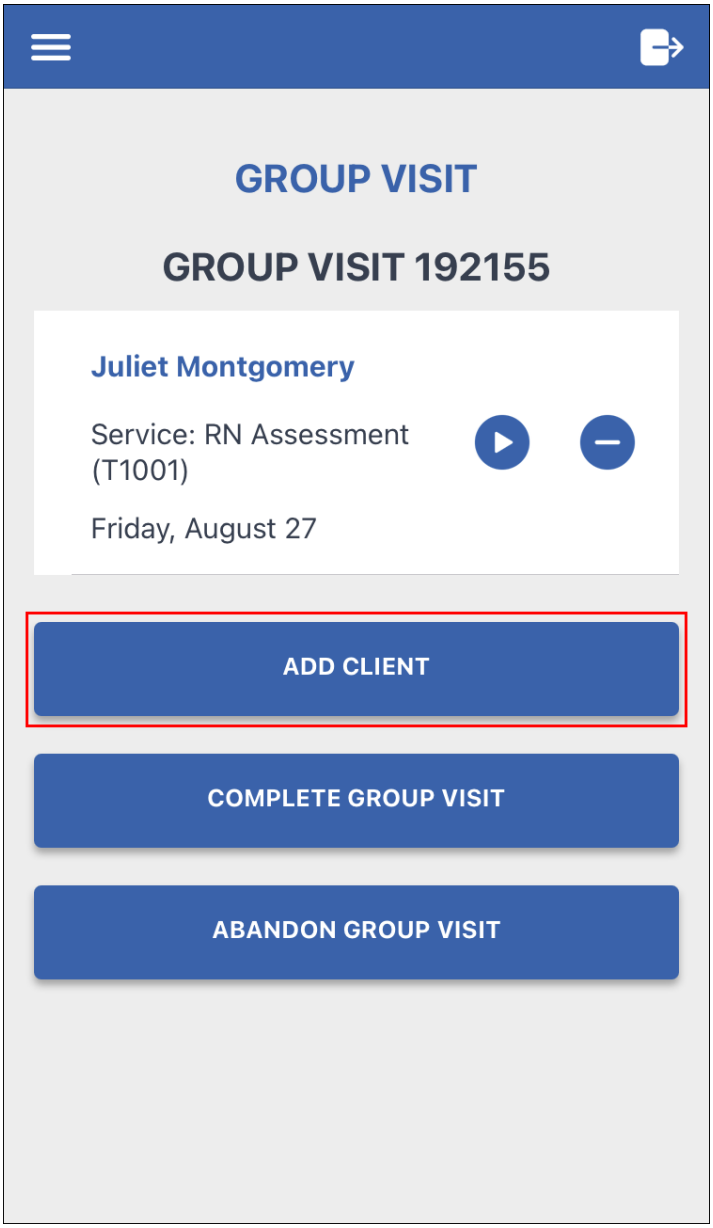
Adding an Additional Client to a Group Visit

After starting a group visit, users can add additional clients to the group visit.

1. Tap **ADD CLIENT.**



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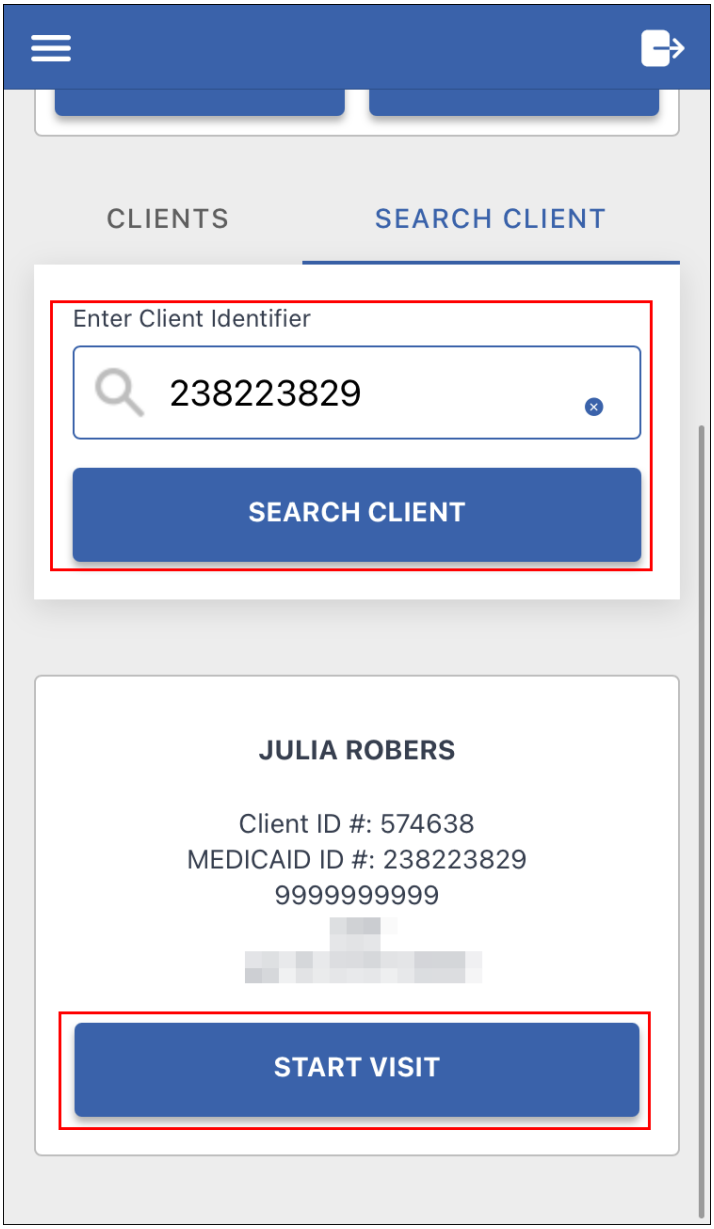
2. Search for a client.
   Enter the full, 10-digit Medicaid ID or the Client ID to find the client.
3. Click **START VISIT**.



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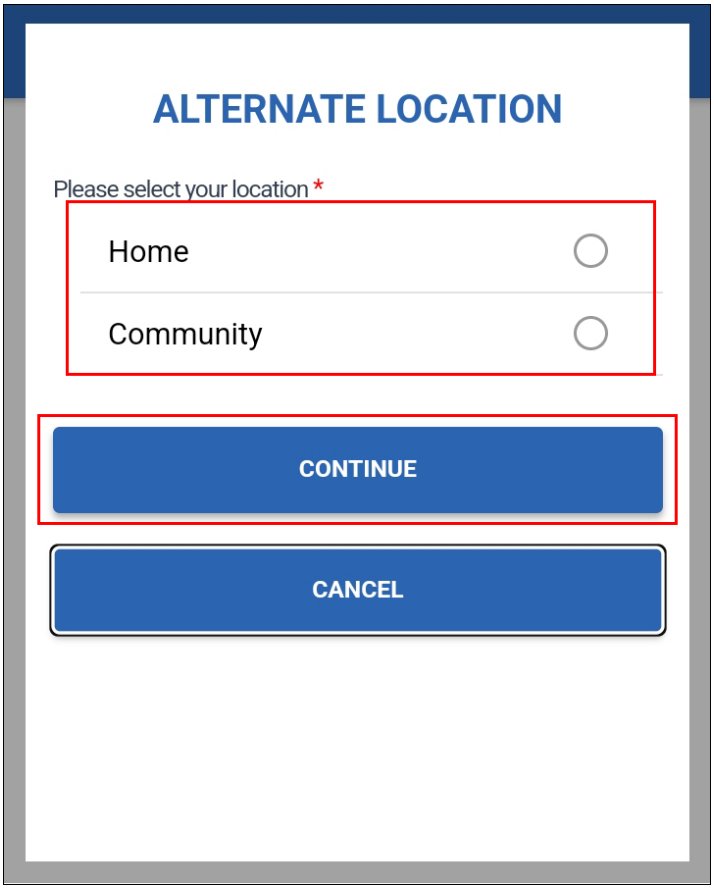
4. Select **Home** or **Community**.
5. Tap **CONTINUE**.
   This records the visit's location and continues the call in or call out process.



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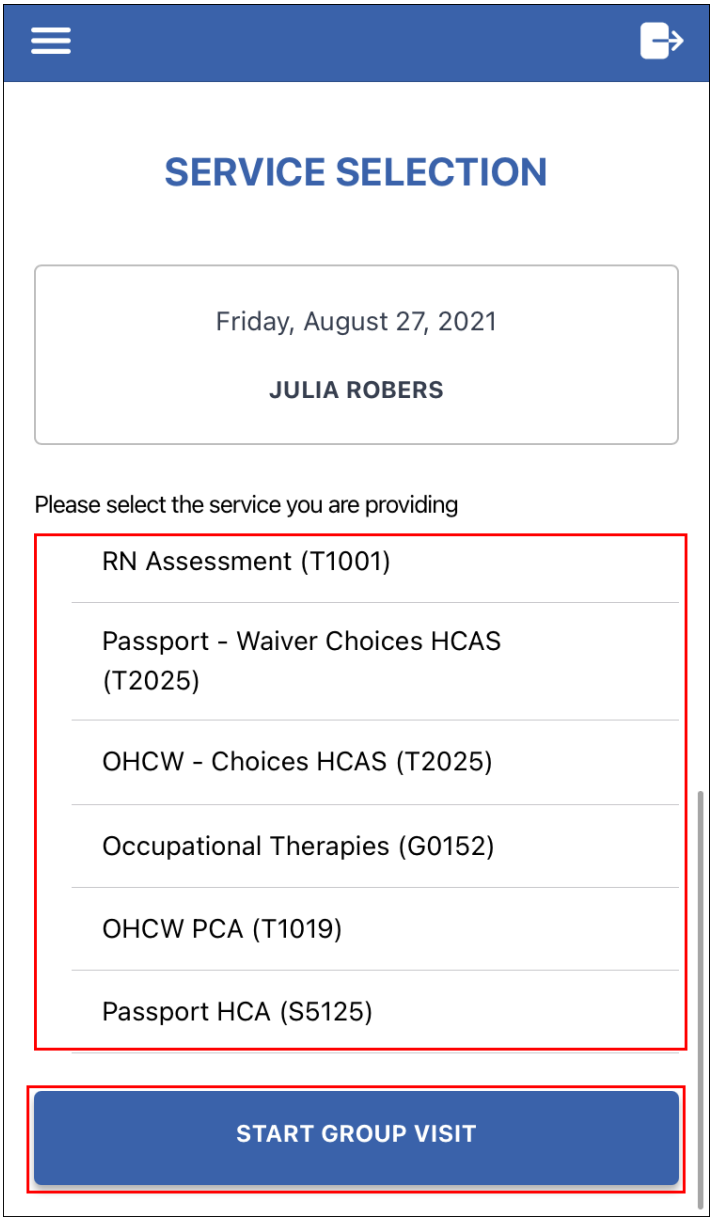
6. Select a service.
   Use your finger to scroll through the list of services.
7. Tap **START GROUP VISIT**.



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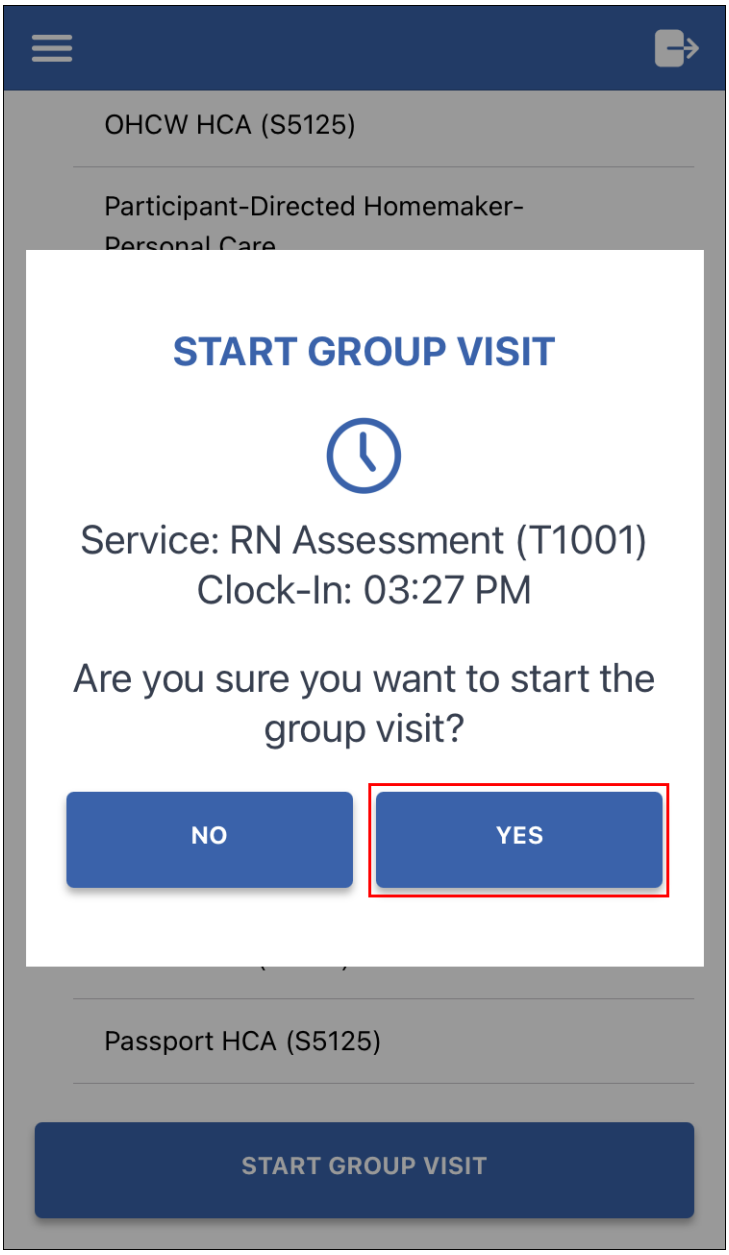
8. Tap **YES**.



Note:
Repeat this process to add any additional clients or set the device down and begin providing services. The device will log off automatically. Log back in when you are ready to complete the visit(s).

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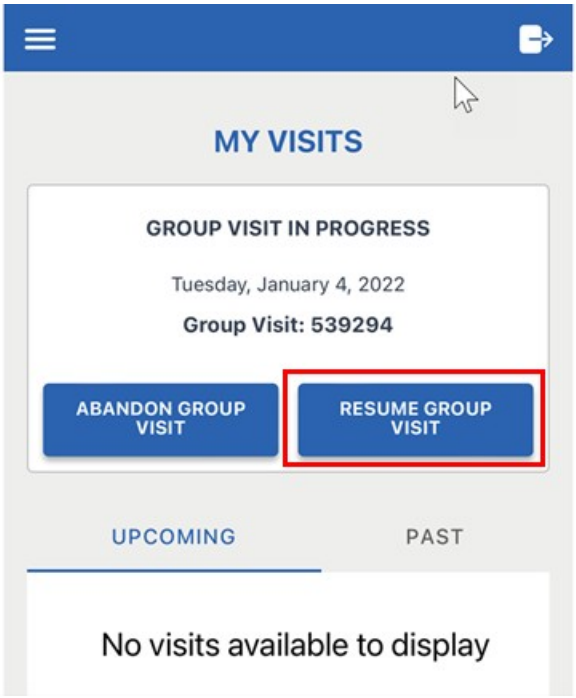
Completing a Group Visit (Staff)

1. Log-in to the application.
1. Tap **RESUME GROUP VISIT**.



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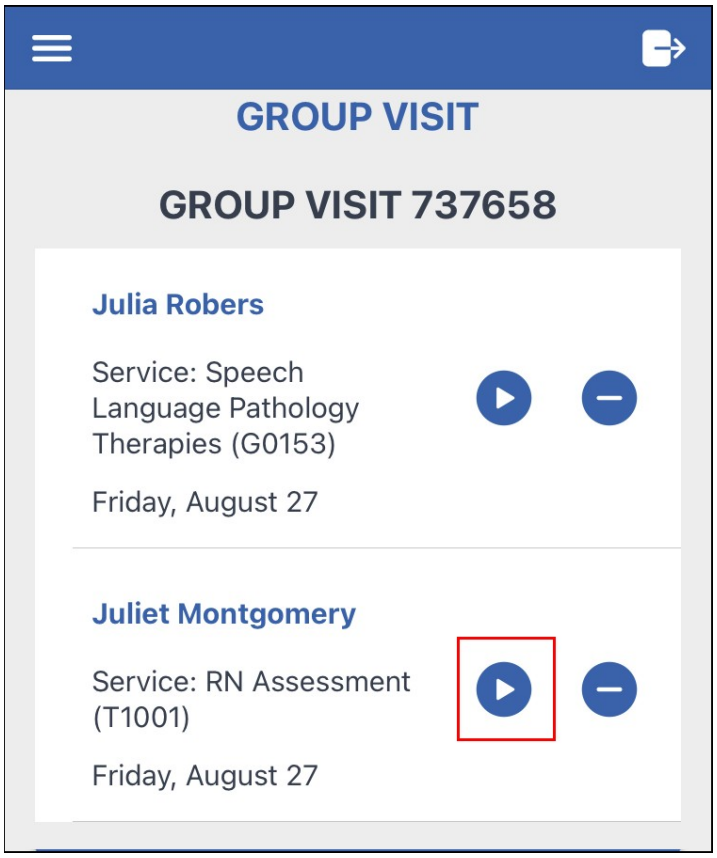
2. Select the client by clicking the arrow.

Note:

Tap dash ( ) to abandon the visit for an individual client or **ABANDON GROUP VISIT** to abandon the visit for all clients in the group. This will end the visit without completing the call. Caregivers abandon a call when they forget to log out at the end of their shift. Abandoning the call gives the opportunity for another caregiver to use the device.



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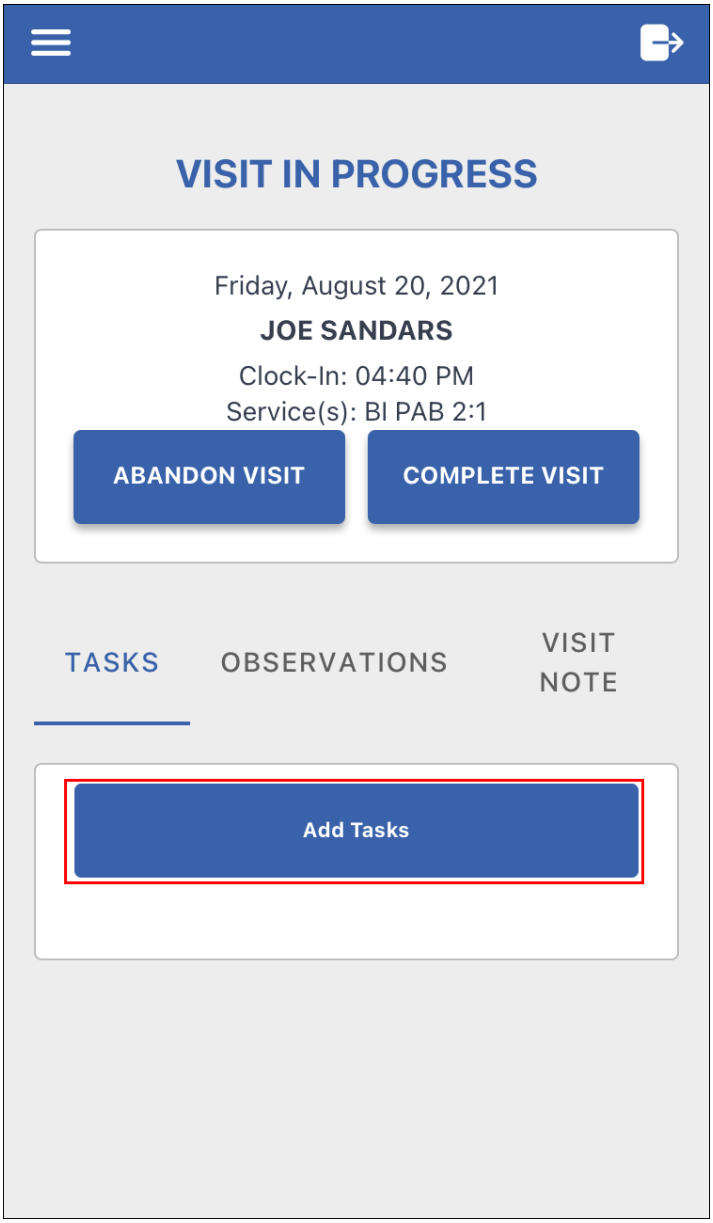
3. Tap **Add Tasks** to open the task list.



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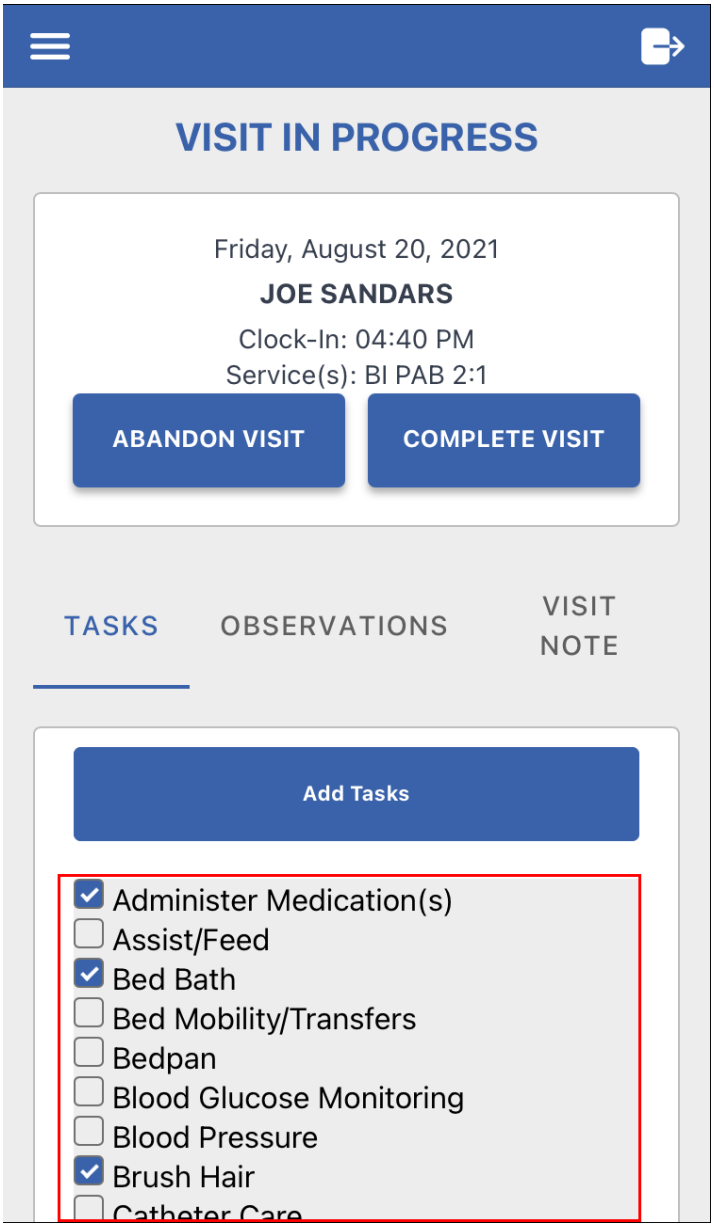
4. Tap the applicable task(s) from the task list.
   Some tasks require the user to enter a value in the field (e.g weight, blood pressure, or car fare).
5. Tap **Add Tasks** to close the task list.



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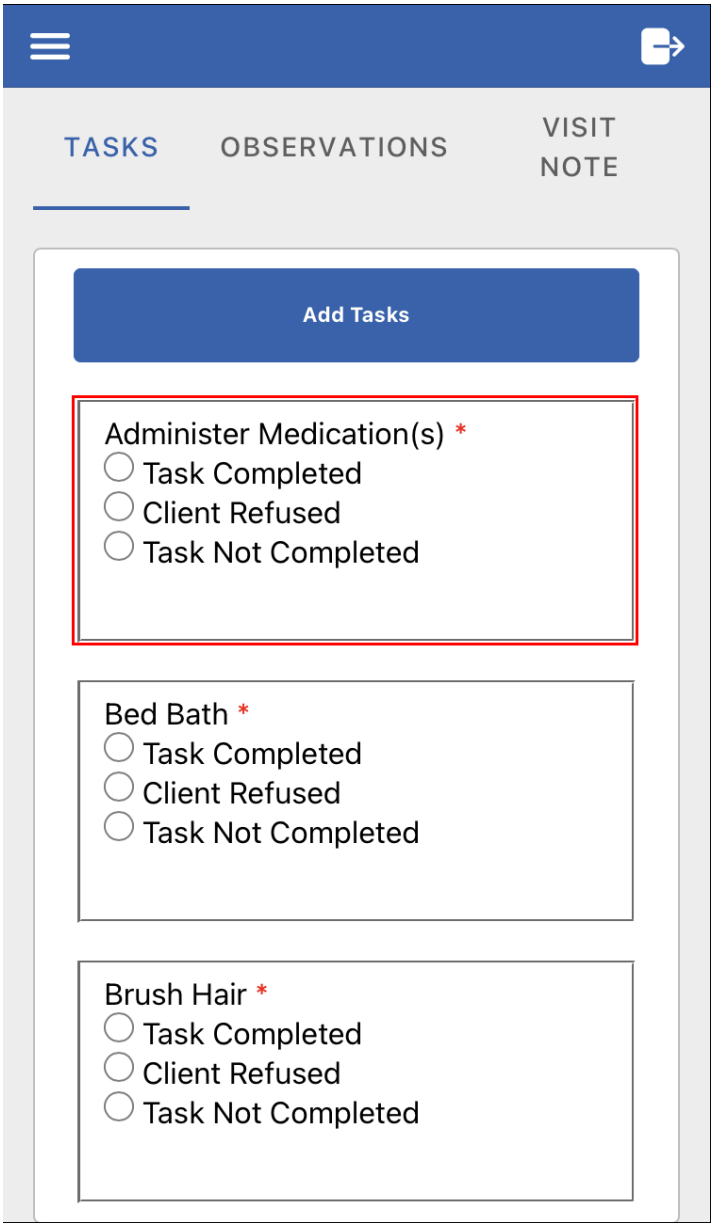
6. Tap **Task Complete**, **Task Not Completed** or **Client Refused**.



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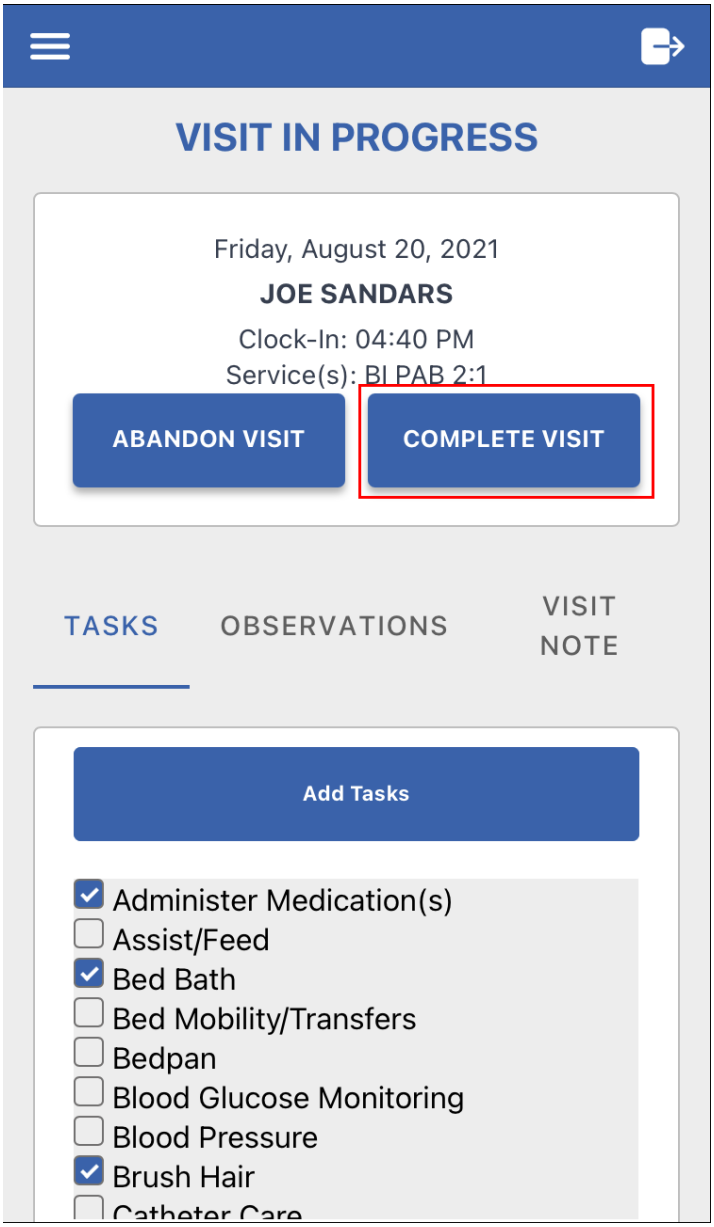
7. Tap **COMPLETE VISIT**.



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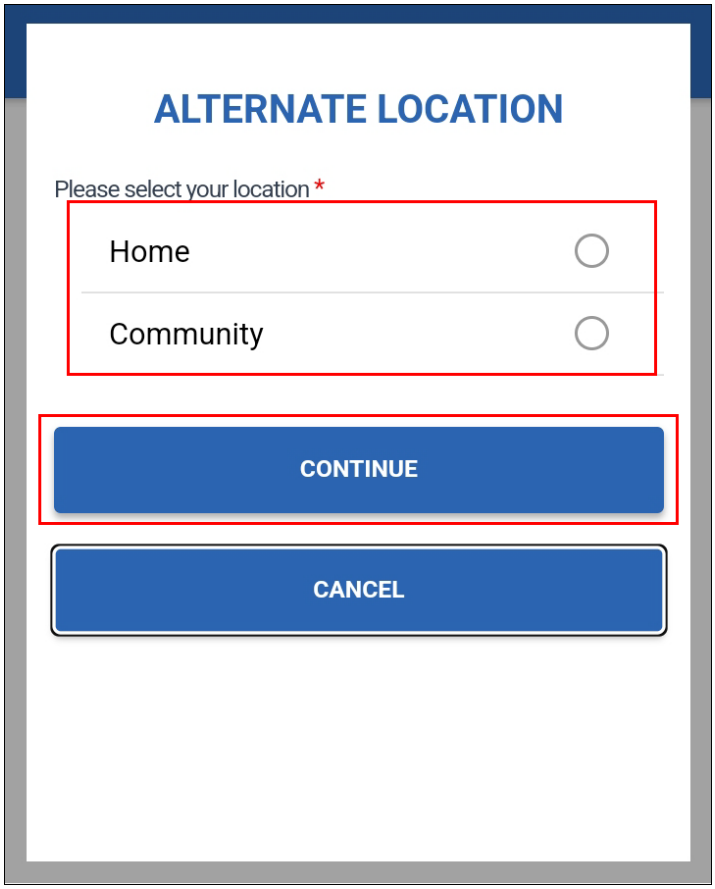
8. Select **Home** or **Community**.
9. Tap **CONTINUE**.
   This records the visit's location and continues the call in or call out process.



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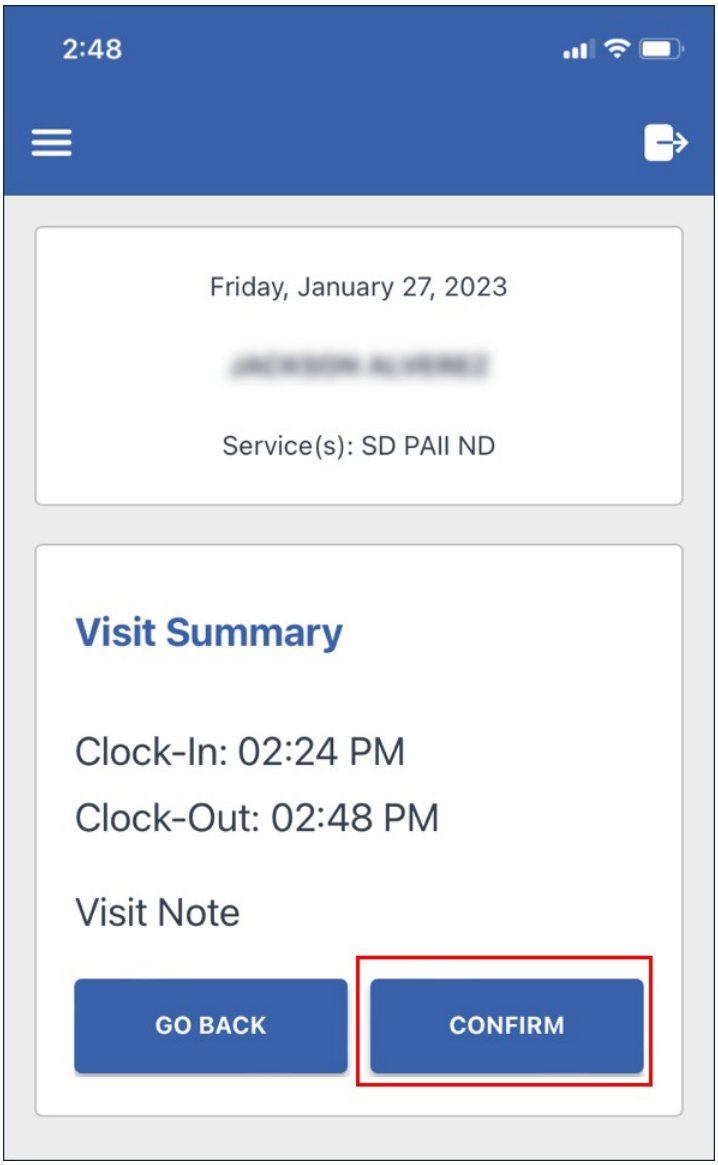
10. Tap **CONFIRM**.



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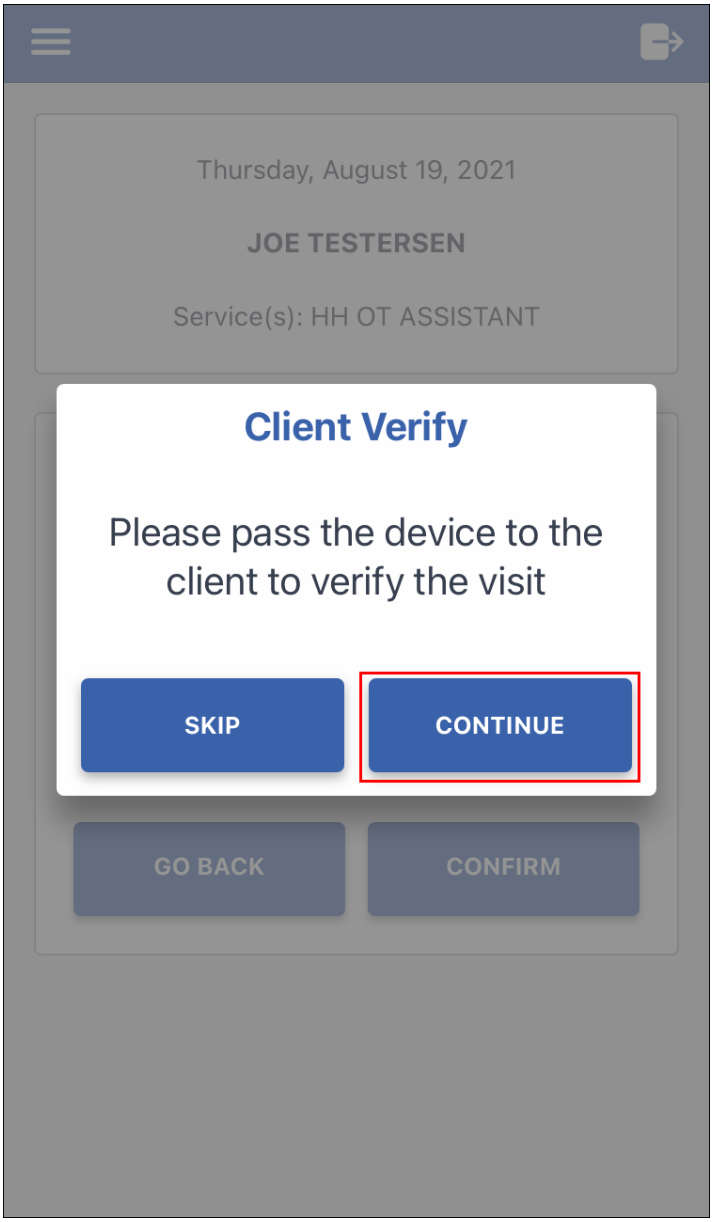
Completing a Group Visit (Client Confirmation)

1. Tap **CONTINUE**.
   Pass the device to the client to verify the visit.



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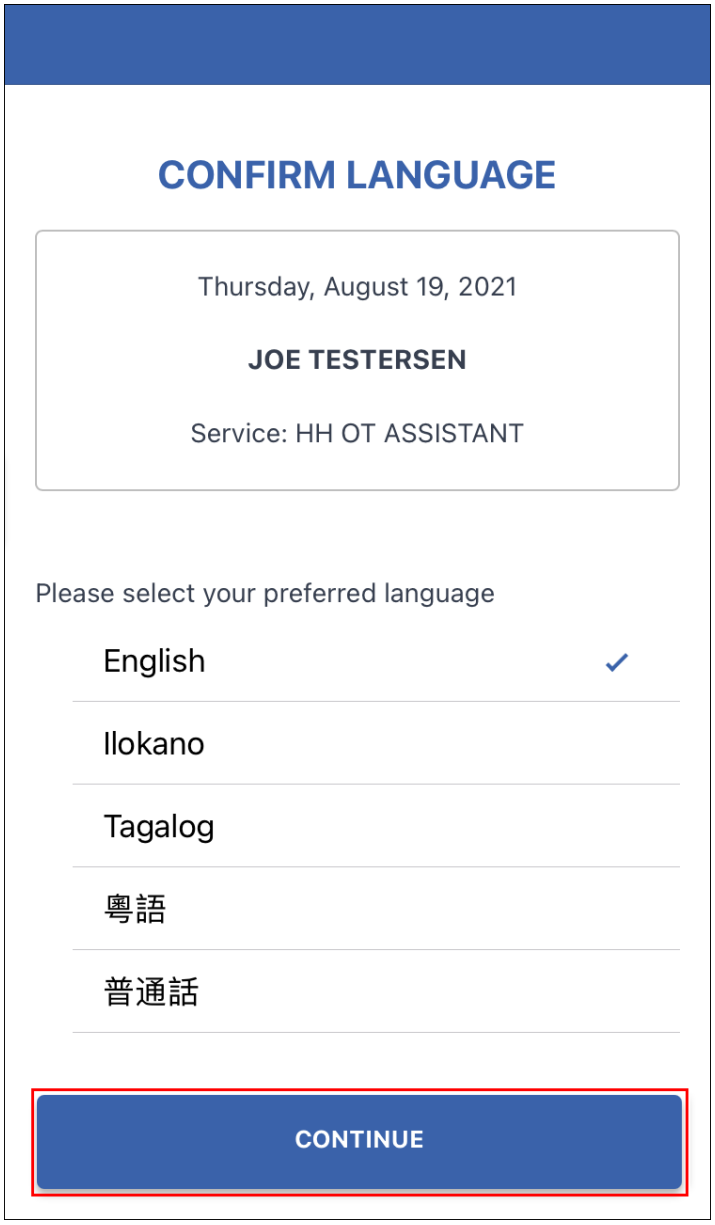
2. Select a language from the list.
3. Tap **CONTINUE**.



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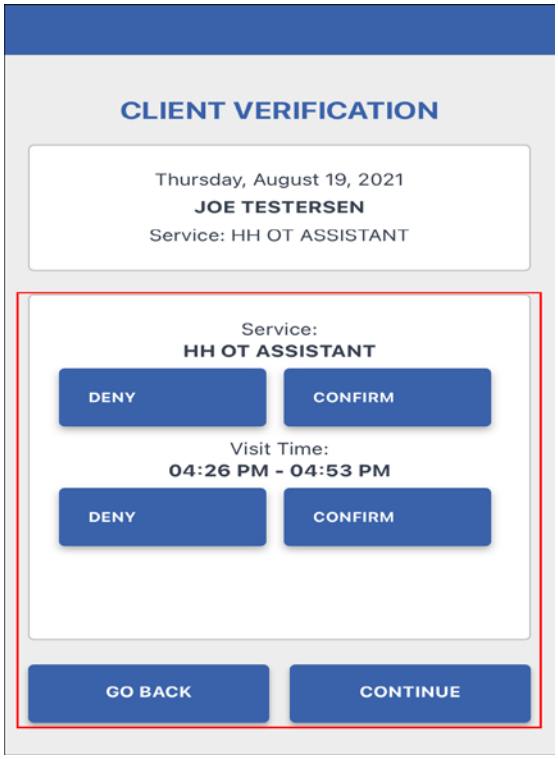
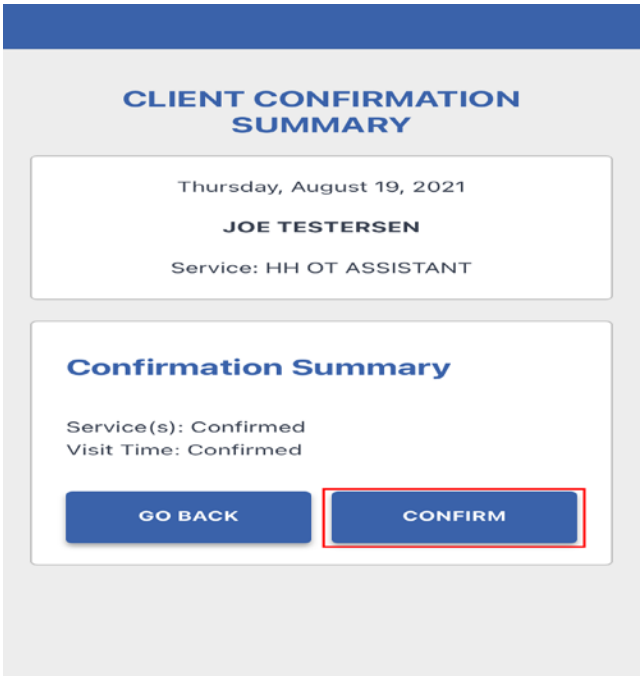
4. Tap **CONFIRM** or **DENY** to record approve or reject the **Service** and **Visit Time**.
5. Tap **CONTINUE**.



6. Tap **CONFIRM**.



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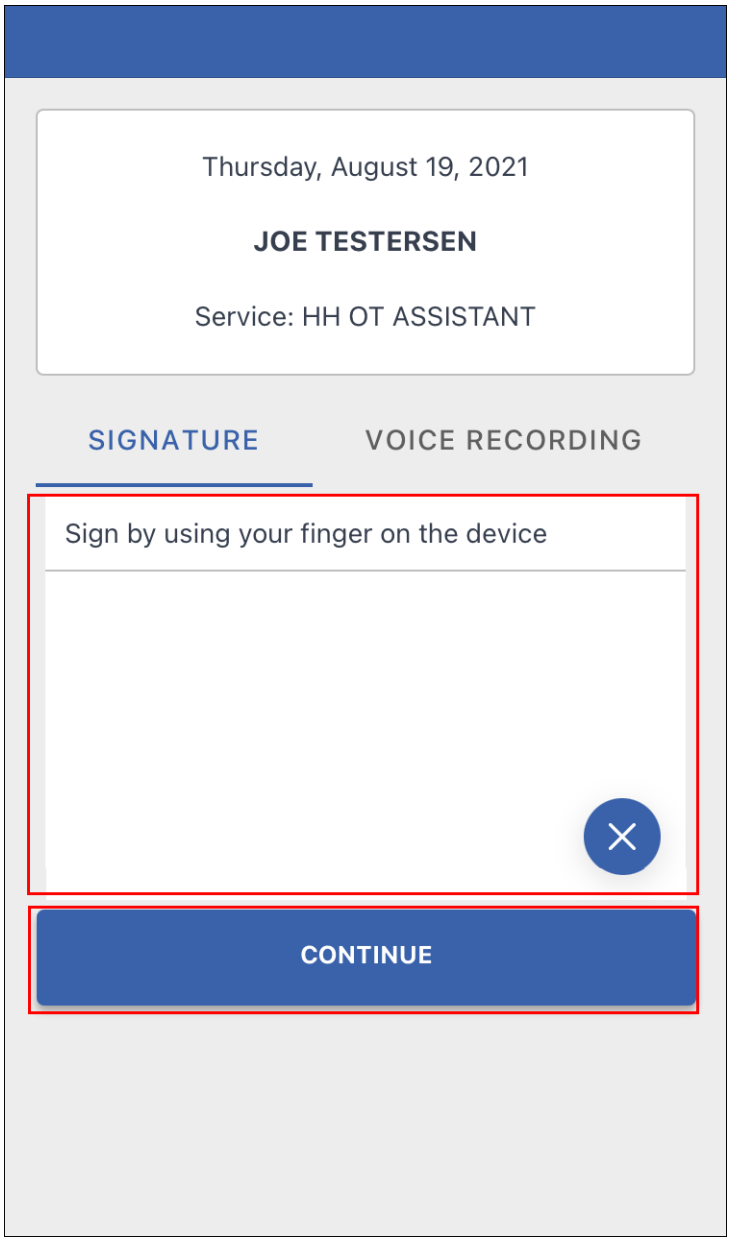
7. Tap either **SIGNATURE** or **VOICE RECORDING**.
   A. **SIGNATURE**.
      i. Sign the device using a finger.
      ii. Tap **CONTINUE**.



Note:
Tap ( ) to clear the signature field.

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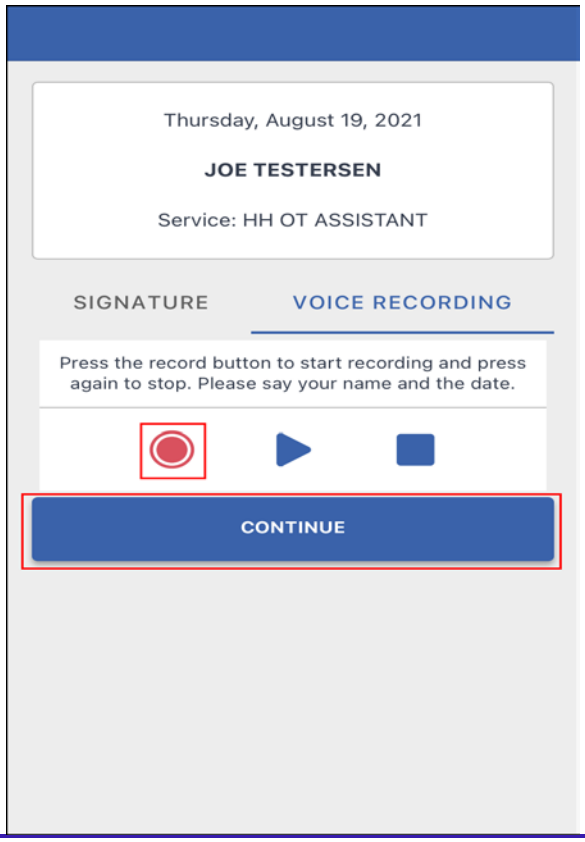
B. **VOICE RECORDING**.

i. Tap **Record** ( ).
The client speaks their name and the date into the device.

ii. **Tap** the record button to stop the recording.

iii. Tap **CONTINUE**.



Note:
Tap record to overwrite an existing voice recording.

Note:
Voice recordings may be a maximum of 15 seconds. Click the play button to play the recorded audio.

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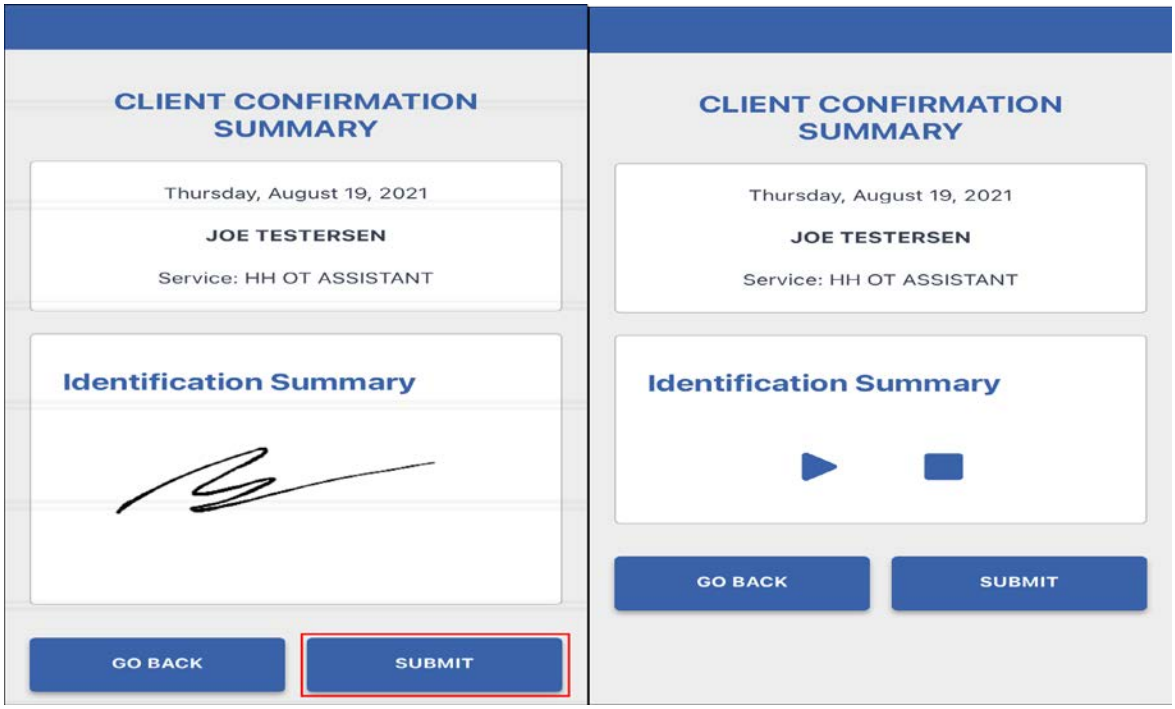
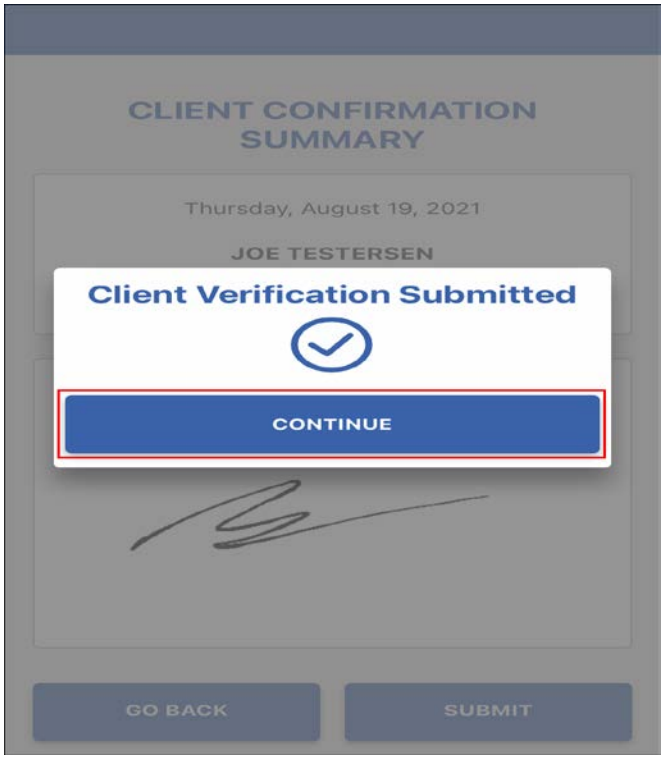
8. Tap **SUBMIT**.



9. Tap **CONTINUE**.



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Completing a Group Visit (Client Confirmation)

Note:
After completing the visit you will automatically be logged out of the application. Log back in and repeat the completing a visit process for any additional clients in the group visit, as applicable.

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