




Sandata Mobile Connect (SMC): Starting a Group Visit

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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.

Standard Login	Touch ID / Fingerprint Login	Face ID Login
 COMPANY ID * <input type="text" value="Company ID"/> USERNAME * <input type="text" value="Username"/> PASSWORD * <input type="password" value="Password"/>  * Required field <input type="button" value="LOG IN"/> FORGOT PASSWORD? Privacy Policy 2.0.107 © 2018-2021 Sandata Technologies, LLC	 COMPANY ID * <input type="text" value="Company ID"/> USERNAME * <input type="text" value="Username"/> PASSWORD * <input type="password" value="Password"/>  * Required field <input type="button" value="LOG IN"/> FORGOT PASSWORD? 2.0.177 © 2018-2021 Sandata Technologies, LLC	 COMPANY ID * <input type="text" value="Company ID"/> USERNAME * <input type="text" value="Username"/> PASSWORD * <input type="password" value="Password"/>  * Required field <input type="button" value="LOG IN"/> FORGOT PASSWORD? 2.0.177 © 2018-2021 Sandata Technologies, LLC


3. Tap **LOG IN**.



COMPANY ID *

USERNAME *

PASSWORD *



* Required field

LOG IN

[FORGOT PASSWORD?](#)

[Privacy Policy](#)

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

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**.

A screenshot of a mobile application interface. At the top, there is a blue header bar with a white hamburger menu icon on the left and a white right-pointing arrow icon on the right. Below the header is a white search bar containing a magnifying glass icon on the left, the text '12321111111' in the center, and a small blue 'x' icon on the right. Below the search bar is a blue button with the text 'SEARCH CLIENT' in white. Below this is a white card with a blue border. Inside the card, the name 'JULIET MONTGOMERY' is displayed in bold. Below the name, the following information is listed: 'Client ID #: 678974', 'MEDICAID ID #: 12321111111', '9999999999', '26 Harbor Park Drive', and 'Port Washington, NY 11050-0000'. Below this information are three blue buttons with white text: 'START VISIT', 'START GROUP VISIT', and 'JOIN GROUP VISIT'. The 'START GROUP VISIT' button is highlighted with a red rectangular border.

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

5. Select **Home** or **Community**.

6. Tap **CONTINUE**.

This records the visit's location and continues the call in or call out process.

ALTERNATE LOCATION

Please select your location *

Home ☐

Community ☐

CONTINUE

CANCEL

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

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

SERVICE SELECTION

Tuesday, August 24, 2021

JULIET MONTGOMERY

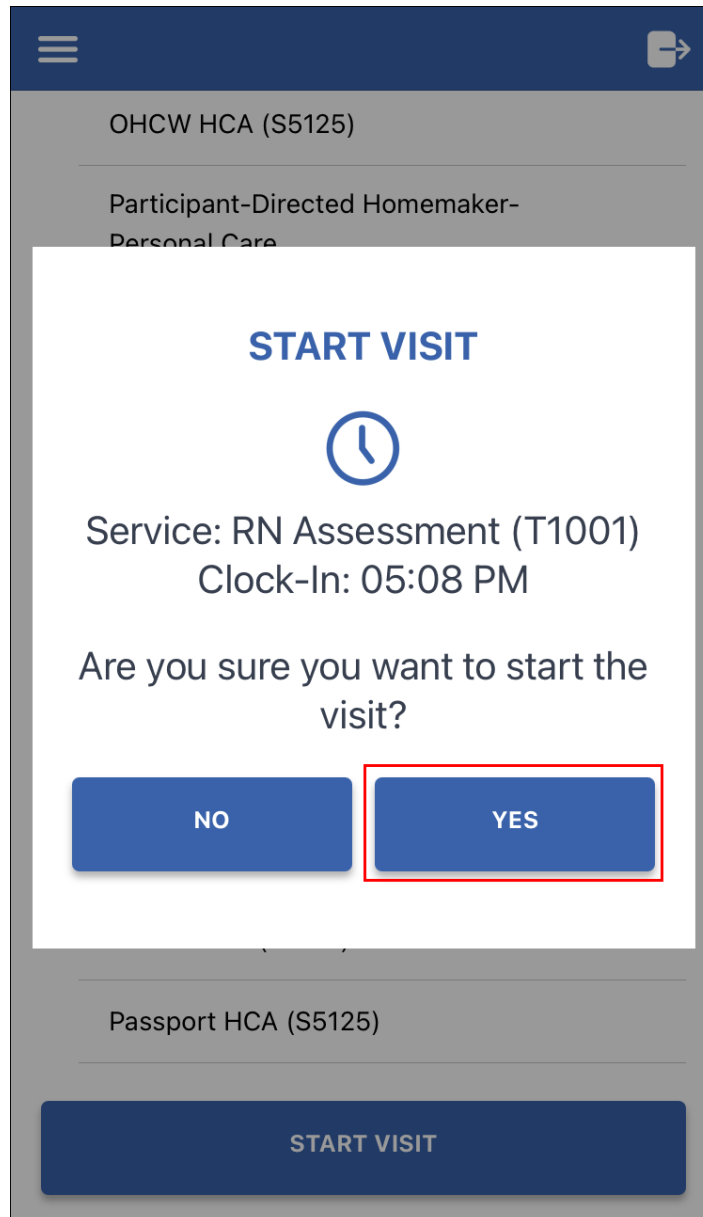
Please select the service you are providing

- RN Assessment (T1001)
- Passport - Waiver Choices HCAS (T2025)
- OHCW - Choices HCAS (T2025)
- Occupational Therapies (G0152)
- OHCW PCA (T1019)
- Passport HCA (S5125)

START GROUP VISIT

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

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

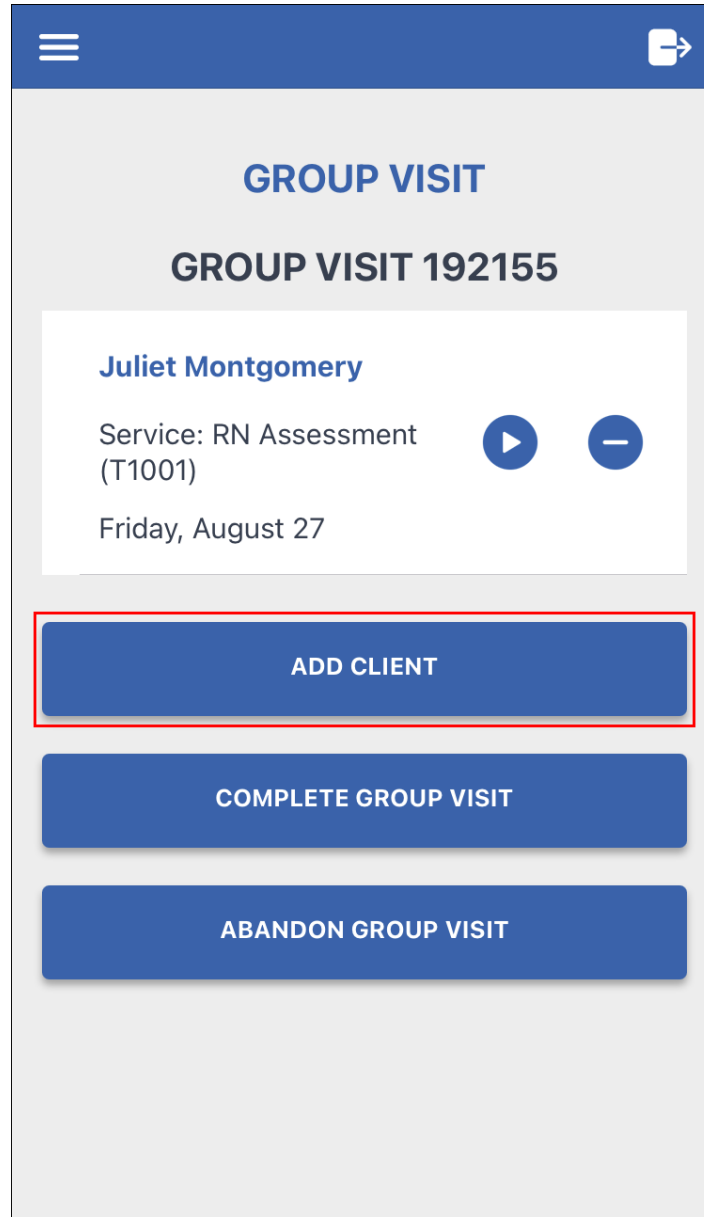


Adding an Additional Client to a Group Visit

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**.



Adding an Additional Client to a Group Visit

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

The screenshot displays the Sandata mobile application interface. At the top, there is a blue header bar with a menu icon on the left and a back arrow on the right. Below the header, there are two tabs: "CLIENTS" and "SEARCH CLIENT". The "SEARCH CLIENT" tab is currently selected. Under this tab, there is a white box containing a search form. The form has a label "Enter Client Identifier" above a text input field. The input field contains the number "238223829" and a magnifying glass icon on the left, and a small "x" icon on the right. Below the input field is a blue button labeled "SEARCH CLIENT". Below the search form, there is a white box displaying the client information for "JULIA ROBERS". The information includes "Client ID #: 574638", "MEDICAID ID #: 238223829", and "9999999999". Below this information is a blurred image of a person. At the bottom of the white box is a blue button labeled "START VISIT". Red rectangular boxes highlight the search input field and the "START VISIT" button.

Adding an Additional Client to a Group Visit

4. Select **Home** or **Community**.

5. Tap **CONTINUE**.

This records the visit's location and continues the call in or call out process.

ALTERNATE LOCATION

Please select your location *

Home ☐

Community ☐

CONTINUE

CANCEL

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

SERVICE SELECTION

Friday, August 27, 2021

JULIA ROBERS

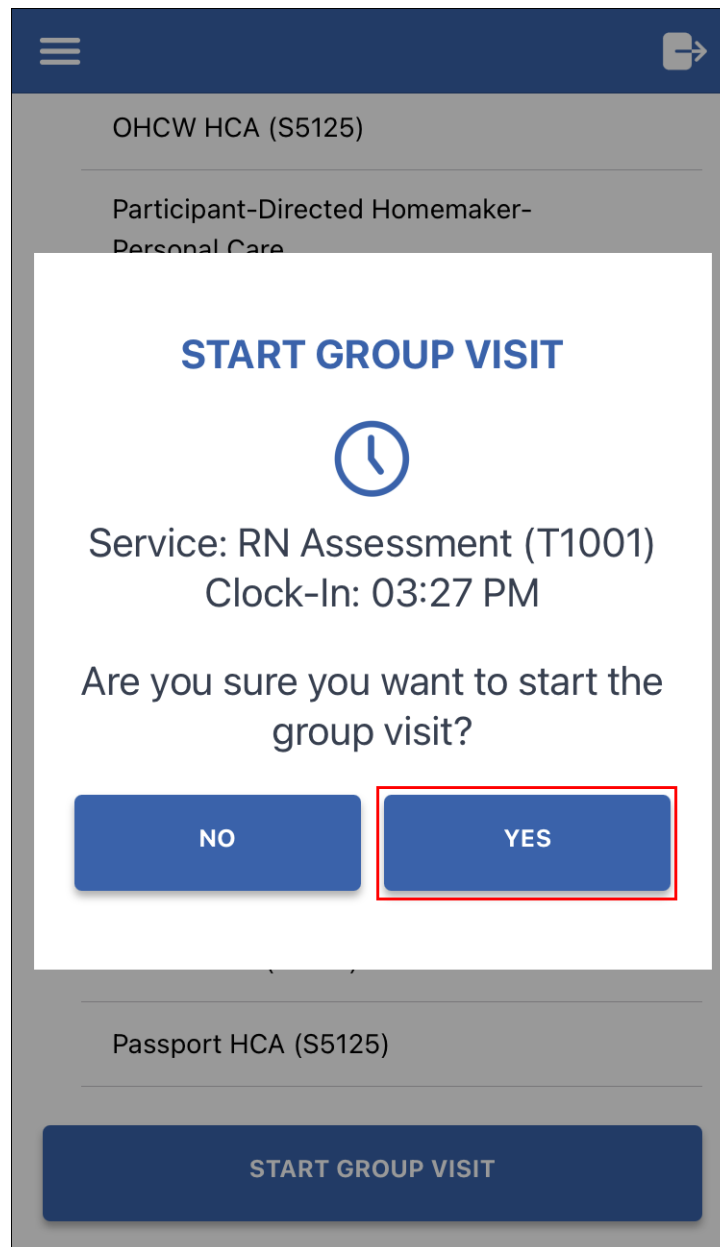
Please select the service you are providing

- RN Assessment (T1001)
- Passport - Waiver Choices HCAS (T2025)
- OHCW - Choices HCAS (T2025)
- Occupational Therapies (G0152)
- OHCW PCA (T1019)
- Passport HCA (S5125)

START GROUP VISIT

Adding an Additional Client to a Group Visit

8. Tap YES.

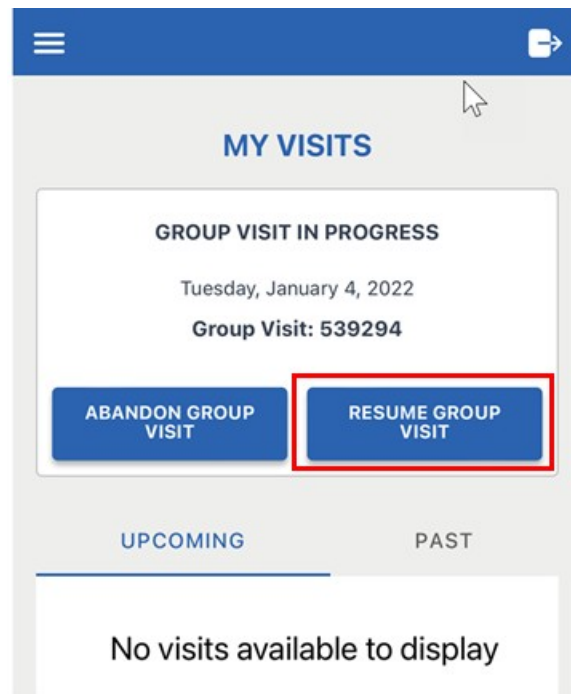


Note:

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).

Completing a Group Visit (Staff)

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




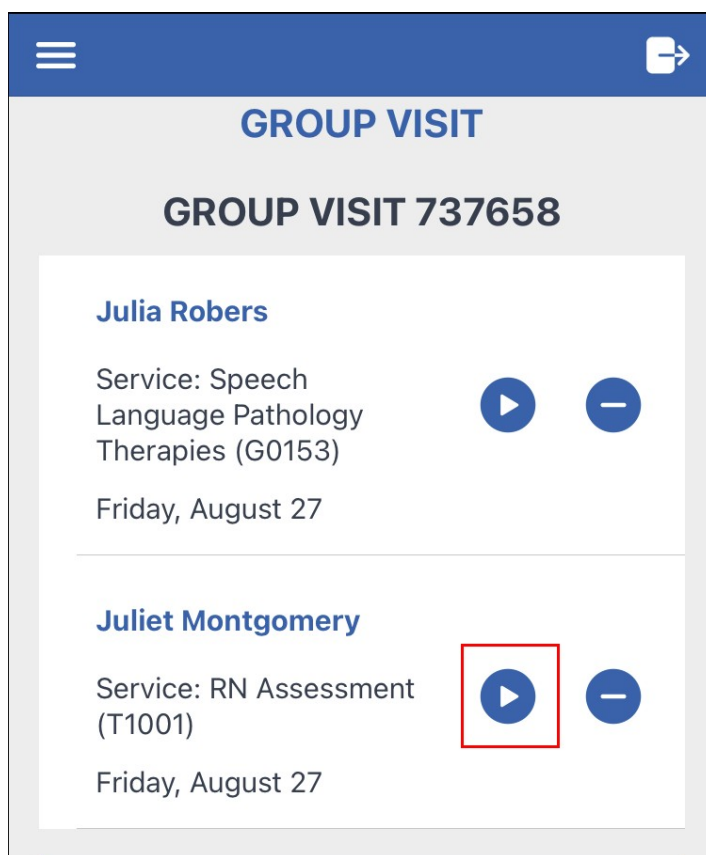
Completing a Group Visit (Staff)

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.



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

The screenshot shows a mobile application interface for a group visit. At the top, there is a blue header bar with a menu icon on the left and a back arrow on the right. Below the header, the title "VISIT IN PROGRESS" is displayed in blue. A white box contains the following information: "Friday, August 20, 2021", "JOE SANDARS", "Clock-In: 04:40 PM", and "Service(s): BI PAB 2:1". Below this information are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". Below the buttons, there are three tabs: "TASKS", "OBSERVATIONS", and "VISIT NOTE". The "TASKS" tab is selected, indicated by a blue underline. Below the tabs, there is a white box containing a blue button labeled "Add Tasks", which is highlighted with a red border.

Completing a Group Visit (Staff)

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.

VISIT IN PROGRESS

Friday, August 20, 2021
JOE SANDARS
Clock-In: 04:40 PM
Service(s): BI PAB 2:1

ABANDON VISIT **COMPLETE VISIT**

TASKS OBSERVATIONS VISIT NOTE

Add Tasks

- ☒ Administer Medication(s)
- ☐ Assist/Feed
- ☒ Bed Bath
- ☐ Bed Mobility/Transfers
- ☐ Bedpan
- ☐ Blood Glucose Monitoring
- ☐ Blood Pressure
- ☒ Brush Hair
- ☐ Catheter Care

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

The screenshot shows the Sandata mobile app interface for completing a group 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, there are three tabs: 'TASKS' (selected), 'OBSERVATIONS', and 'VISIT NOTE'. Under the 'TASKS' tab, there is a blue button labeled 'Add Tasks'. Below this button, there are three task categories, each with a title and three radio button options:

- Administer Medication(s) ***
 - ☐ Task Completed
 - ☐ Client Refused
 - ☐ Task Not Completed
- Bed Bath ***
 - ☐ Task Completed
 - ☐ Client Refused
 - ☐ Task Not Completed
- Brush Hair ***
 - ☐ Task Completed
 - ☐ Client Refused
 - ☐ Task Not Completed

Completing a Group Visit (Staff)

7. Tap COMPLETE VISIT.

VISIT IN PROGRESS

Friday, August 20, 2021
JOE SANDARS
Clock-In: 04:40 PM
Service(s): BI PAB 2:1

ABANDON VISIT **COMPLETE VISIT**

TASKS **OBSERVATIONS** **VISIT NOTE**

Add Tasks

- ☒ Administer Medication(s)
- ☐ Assist/Feed
- ☒ Bed Bath
- ☐ Bed Mobility/Transfers
- ☐ Bedpan
- ☐ Blood Glucose Monitoring
- ☐ Blood Pressure
- ☒ Brush Hair
- ☐ Catheter Care

8. Select **Home** or **Community**.

9. Tap **CONTINUE**.

This records the visit's location and continues the call in or call out process.

ALTERNATE LOCATION

Please select your location *

Home ☐

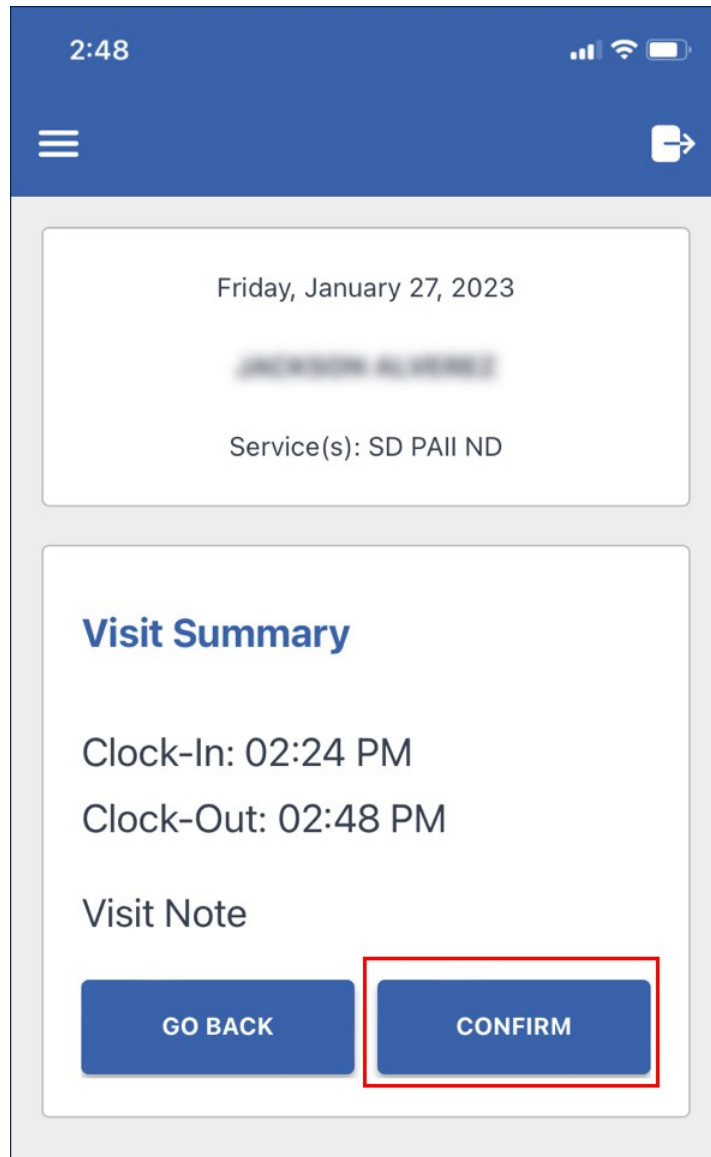
Community ☐

CONTINUE

CANCEL

Completing a Group Visit (Staff)

10. Tap **CONFIRM**.



The screenshot shows a mobile application interface for completing a group visit. At the top, a blue header bar contains the time 2:48, signal strength, Wi-Fi, and battery icons. Below the header is a white navigation bar with a hamburger menu icon on the left and a right arrow icon on the right. The main content area is divided into two sections. The first section, titled 'Friday, January 27, 2023', contains a blurred 'JUNCTION ALARMED' status and 'Service(s): SD PAII ND'. The second section, titled 'Visit Summary', displays 'Clock-In: 02:24 PM' and 'Clock-Out: 02:48 PM'. Below the summary is a 'Visit Note' field. At the bottom, there are two blue buttons: 'GO BACK' and 'CONFIRM'. The 'CONFIRM' button is highlighted with a red rectangular border.

2:48

Friday, January 27, 2023

JUNCTION ALARMED

Service(s): SD PAII ND

Visit Summary

Clock-In: 02:24 PM

Clock-Out: 02:48 PM

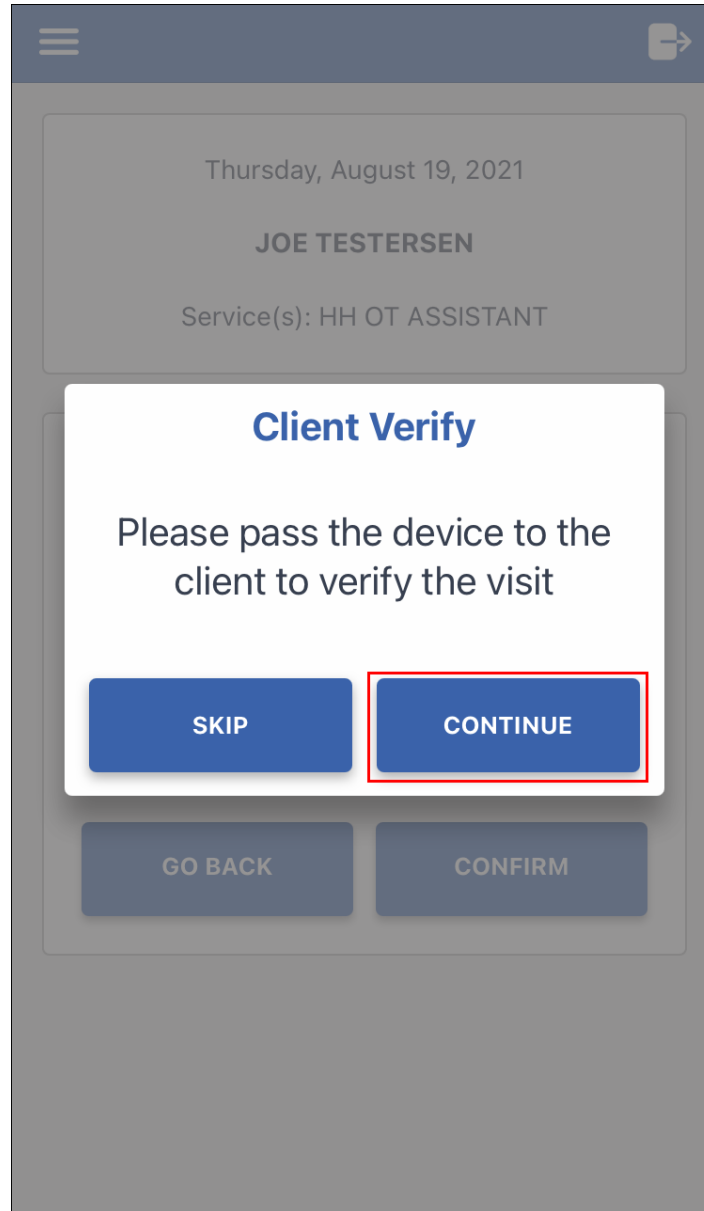
Visit Note

GO BACK CONFIRM

Completing a Group Visit (Client Confirmation)

Completing a Group Visit (Client Confirmation)

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



Completing a Group Visit (Client Confirmation)

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

CONFIRM LANGUAGE

Thursday, August 19, 2021

JOE TESTERSEN

Service: HH OT ASSISTANT

Please select your preferred language

English ✓

Ilokano

Tagalog

粵語

普通話

CONTINUE

Completing a Group Visit (Client Confirmation)

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

CLIENT VERIFICATION

Thursday, August 19, 2021
JOE TESTERSEN
Service: HH OT ASSISTANT

Service:
HH OT ASSISTANT

DENY **CONFIRM**

Visit Time:
04:26 PM - 04:53 PM

DENY **CONFIRM**

GO BACK **CONTINUE**

6. Tap **CONFIRM**.

CLIENT CONFIRMATION SUMMARY

Thursday, August 19, 2021
JOE TESTERSEN
Service: HH OT ASSISTANT

Confirmation Summary

Service(s): Confirmed
Visit Time: Confirmed

GO BACK **CONFIRM**

Completing a Group Visit (Client Confirmation)

7. Tap either **SIGNATURE** or **VOICE RECORDING**.

A. **SIGNATURE**.

- i. Sign the device using a finger.
- ii. Tap **CONTINUE**.

The screenshot shows a mobile app interface with a blue header bar. Below it, a white box contains the date "Thursday, August 19, 2021", the name "JOE TESTERSEN", and the service "Service: HH OT ASSISTANT". Below this box are two tabs: "SIGNATURE" (which is selected and underlined) and "VOICE RECORDING". Under the "SIGNATURE" tab, there is a large white rectangular area for signing, outlined in red. Above this area is the text "Sign by using your finger on the device". In the bottom right corner of the signing area is a blue circular button with a white "X" icon. Below the signing area is a blue button with the text "CONTINUE", also outlined in red.



Note:

Tap (✕) to clear the signature field.

Completing a Group Visit (Client Confirmation)

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**.

The screenshot shows a mobile app interface with a blue header. Below the header, there is a white box containing the date "Thursday, August 19, 2021", the name "JOE TESTERSEN", and the service "Service: HH OT ASSISTANT". Below this box, there are two tabs: "SIGNATURE" and "VOICE RECORDING", with "VOICE RECORDING" being the active tab. Under the "VOICE RECORDING" tab, there is a text prompt: "Press the record button to start recording and press again to stop. Please say your name and the date." Below the prompt, there are three buttons: a red circular record button, a blue play button, and a blue stop button. At the bottom of the interface, there is a large blue button labeled "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.

Completing a Group Visit (Client Confirmation)

8. Tap **SUBMIT**.

The image displays two side-by-side screenshots of the 'CLIENT CONFIRMATION SUMMARY' screen. Both screens show the date 'Thursday, August 19, 2021', the name 'JOE TESTERSEN', and the service 'HH OT ASSISTANT'. Below this is an 'Identification Summary' section. The left screenshot shows a signature, while the right screenshot shows a play button and a square button. At the bottom of each screen are 'GO BACK' and 'SUBMIT' buttons. In the left screenshot, the 'SUBMIT' button is highlighted with a red rectangle.

9. Tap **CONTINUE**.

The image shows a screenshot of the 'CLIENT CONFIRMATION SUMMARY' screen with a modal overlay. The modal is titled 'Client Verification Submitted' and features a checkmark icon. Below the icon is a 'CONTINUE' button, which is highlighted with a red rectangle. The background screen shows the same information as the previous screenshots, including the date, name, service, and signature.

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.