




# Sandata Mobile Connect (SMC): Starting a Visit

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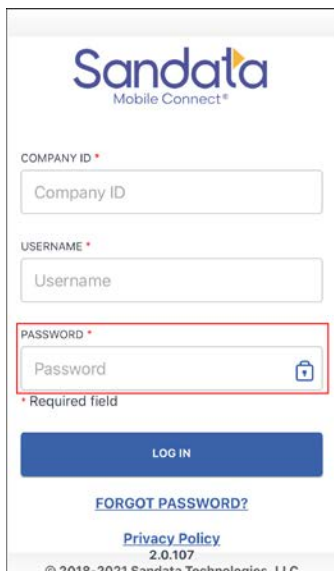
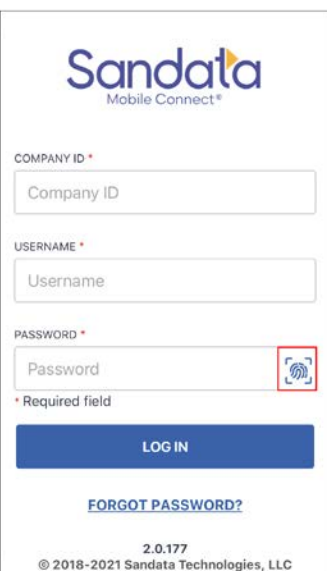
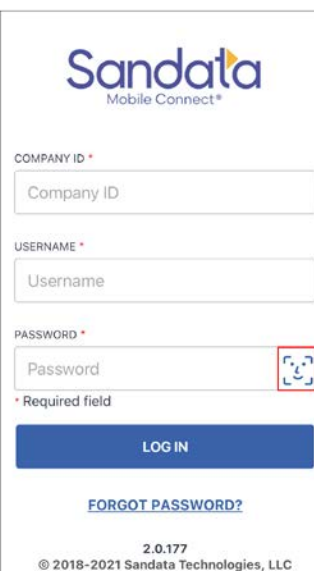
### Logging into SMC

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
		


3. Tap **LOG IN**.



COMPANY ID \*

USERNAME \*

PASSWORD \*

\* Required field

**LOG IN**

[FORGOT PASSWORD?](#)

[Privacy Policy](#)

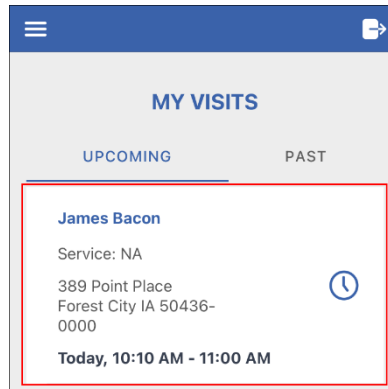
# Starting a Visit from the Search Client Tab (Known Client)

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

Use this functionality to search for a client when you know their client identifier.

**Note:**

Scheduled visits will display on the UPCOMING tab on the My Visits screen once logged in. Click the client's tile and follow the prompts for a scheduled visit.



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.

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

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

**SEARCH CLIENT**

CLIENTS      **SEARCH CLIENT**

Enter Client Identifier

**SEARCH CLIENT**

**JULIET MONTGOMERY**

Client ID #: 678974  
MEDICAID ID #: 12321111111  
9999999999  
26 Harbor Park Drive  
Port Washington, NY 11050-0000

**START VISIT**

**START GROUP VISIT**

# Starting a 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 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 VISIT**.

**SERVICE SELECTION**

Tuesday, August 31, 2021

**JULIET MONTGOMERY**

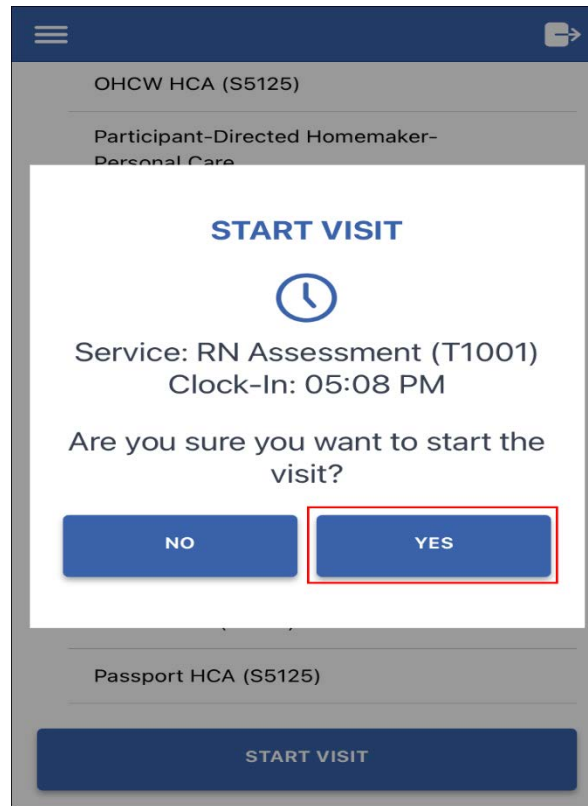
Please select the service you are providing

- RN Assessment (T1001)
- Passport - Waiver Choices HCAS (T2025)
- OHCW - Choices HCAS (T2025)
- MyCare - Waiver Choices HCAS (T2025)
- Passport - Consumer Directed Personal Care (T1019)

**START VISIT**

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

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



**Note:**

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.

## Completing a Visit (Staff)

### Completing a Visit (Staff)



**Note:**

Using **SWITCH SERVICE** users can provide more than one service to a client without ending the current visit and starting a new one for each service. After resuming the visit, select SWITCH SERVICE and follow the prompts.



**Note:**

Abandoning the visit ends the visit without completing the call. Caregivers abandon a call when they do not log out at the end of the visit. Abandoning a visit does not complete the visit but allows a caregiver to begin another visit.

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

**SEARCH CLIENT**

**Visit in Progress**

Thursday, August 19, 2021

**Joe Testersen**

**Visit Time**  
04:26 PM --:--

**Service(s):**  
HH OT ASSISTANT

**ABANDON VISIT** **RESUME VISIT**

**SEARCH CLIENT**

Enter Client Identifier

Search

**SEARCH CLIENT**



## Completing a Visit (Staff)

3. Tap **Add Tasks** to open 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**

## Completing a 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

# Completing a Visit (Staff)

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

The screenshot shows the Sandata mobile application interface. At the top, there is a blue header bar with a menu icon on the left and a document icon on the right. Below the header, there are three tabs: 'TASKS' (which is selected and underlined), 'OBSERVATIONS', and 'VISIT NOTE'. The main content area is a light gray box containing three task categories, each with a blue 'Add Tasks' button at the top. The first category, 'Administer Medication(s) \*', is highlighted with a red border and contains three radio button options: 'Task Completed', 'Client Refused', and 'Task Not Completed'. The second category, 'Bed Bath \*', also contains the same three radio button options. The third category, 'Brush Hair \*', also contains the same three radio button options.

7. Select **Home** or **Community**.

8. 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 Visit (Staff)

### 9. Tap COMPLETE VISIT.

**VISIT IN PROGRESS**

Thursday, August 19, 2021  
**JOE TESTERSEN**  
Clock-In: 04:26 PM  
Service(s): HH OT ASSISTANT

**ABANDON VISIT** **SWITCH SERVICE**

**COMPLETE VISIT**

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

**Add Tasks**

10. Tap **CONFIRM**.

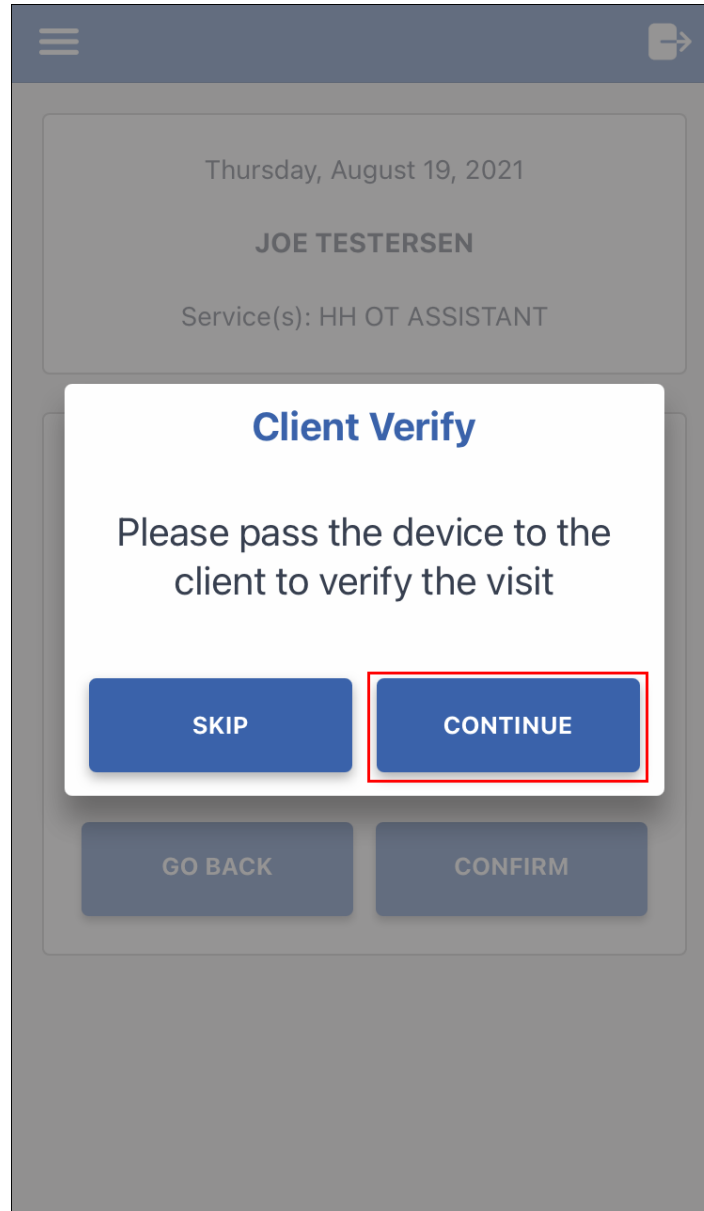
The screenshot shows a mobile application interface for completing a visit. At the top is a blue header bar with a white menu icon on the left and a white back arrow icon on the right. Below the header is a white card containing the date "Thursday, August 19, 2021", the name "JOE TESTERSEN" in bold, and the service "Service(s): HH OT ASSISTANT". Below this card is another white card titled "Visit Summary" in blue. This card displays "Clock-In: 04:26 PM" and "Clock-Out: 04:53 PM", followed by the text "Visit Note Test Note". At the bottom of this card are two blue buttons: "GO BACK" and "CONFIRM". The "CONFIRM" button is highlighted with a red rectangular border.

# Completing a Visit (Client Confirmation)

## Completing a Visit (Client Confirmation)

1. Tap **Continue**.

Pass the device to the client to verify the visit.



## Completing a 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 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**



**Note:**

If switch service functionality is enabled, each service requiring confirmation displays on this screen and must be confirmed or denied.

## Completing a Visit (Client Confirmation)

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 Visit (Client Confirmation)

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

A. **SIGNATURE**.

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

Thursday, August 19, 2021

**JOE TESTERSEN**

Service: HH OT ASSISTANT

**SIGNATURE**      VOICE RECORDING

Sign by using your finger on the device


**CONTINUE**

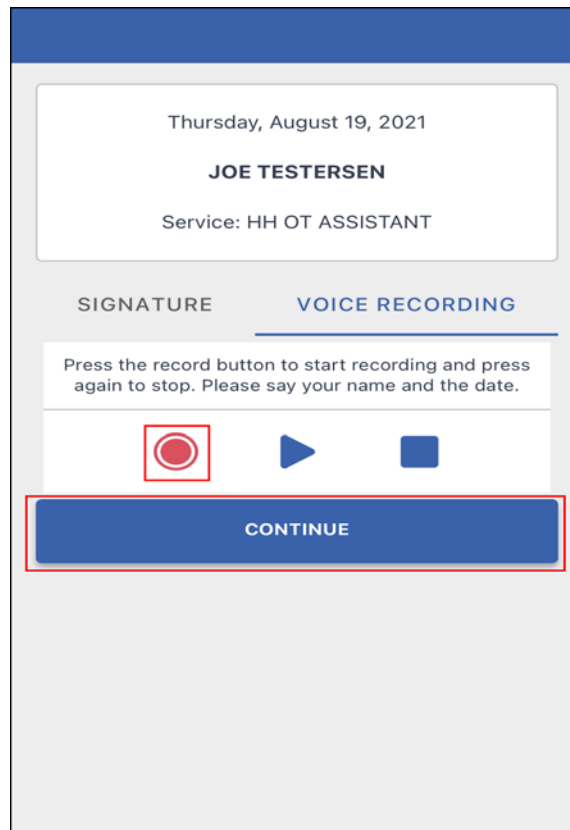


**Note:**

Tap (✕) to clear the signature field.

### 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 for a client confirmation. At the top, it displays the date "Thursday, August 19, 2021" and the client's name "JOE TESTERSEN" with the service "HH OT ASSISTANT". Below this, there are two tabs: "SIGNATURE" and "VOICE RECORDING", with the latter being selected. A text box instructs the user: "Press the record button to start recording and press again to stop. Please say your name and the date." Below the text are three buttons: a red circle with a dot (the record button, highlighted with a red box), a blue play button, and a blue stop button. At the bottom, there is a large blue button labeled "CONTINUE", which is also highlighted with a red box.



**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 Visit (Client Confirmation)

8. Tap **SUBMIT**.

**CLIENT CONFIRMATION SUMMARY**

Thursday, August 19, 2021

**JOE TESTERSEN**

Service: HH OT ASSISTANT

**Identification Summary**

GO BACK SUBMIT

9. Tap **CONTINUE**.

**CLIENT CONFIRMATION SUMMARY**

Thursday, August 19, 2021

**JOE TESTERSEN**

**Client Verification Submitted**

CONTINUE

GO BACK SUBMIT



**Note:**

After completing the visit you will automatically be logged out of the application.