Sandata
Get more right from the start

Mobile Visit Verification
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.

Downloading SMC
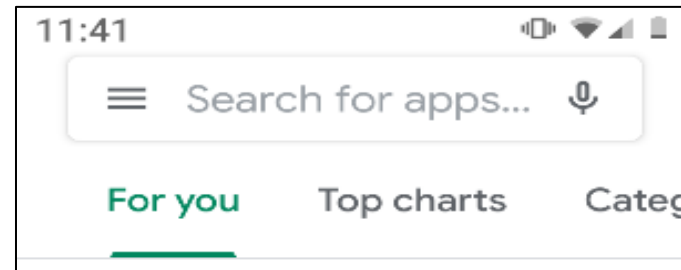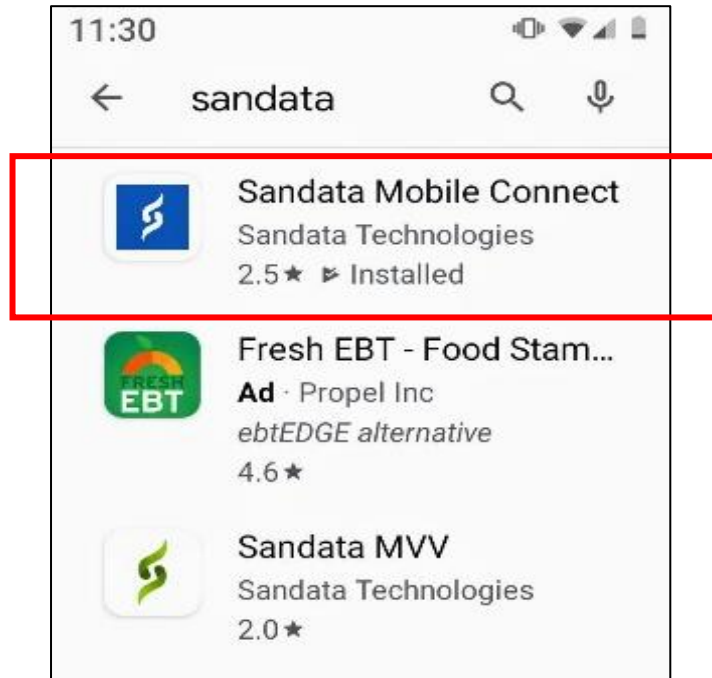
Downloading the App

▶ Tap on the APP store icon for Apple devices or the Play store for Android devices

▶ Type 'Sandata Mobile Connect' into the search field

Downloading the App

Do not download the Sandata MVV version

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.
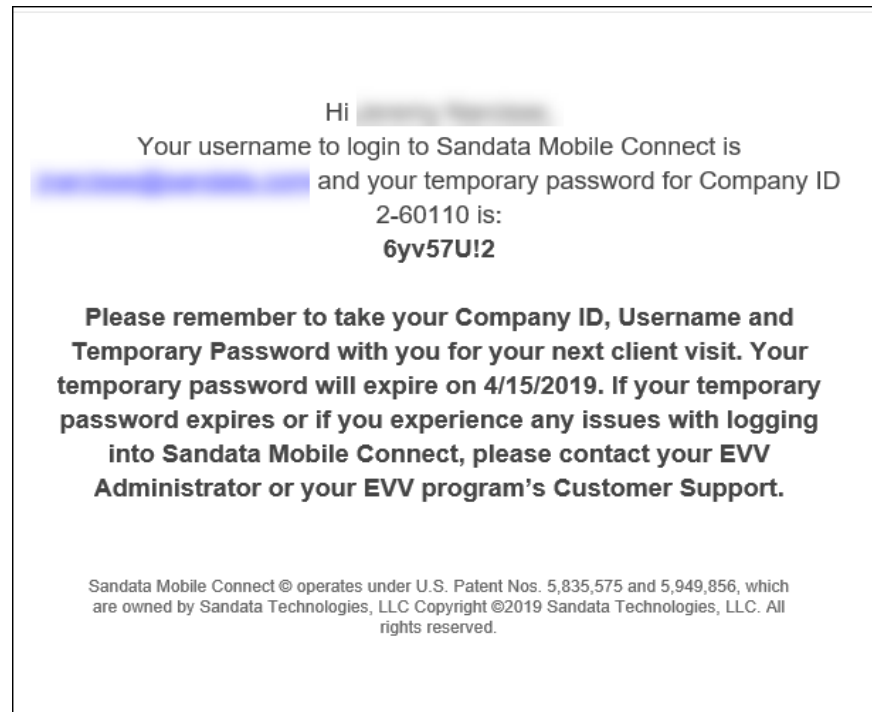
When an agency provider creates an employee, the following information must be specified in the employee profile in order for SMC to create the login credentials.

- 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.

Hi ████████

Your username to login to Sandata Mobile Connect is ████████ and your temporary password for Company ID 2-60110 is:

6yv57U!2

Please remember to take your Company ID, Username and Temporary Password with you for your next client visit. Your temporary password will expire on 4/15/2019. If your temporary password expires or if you experience any issues with logging into Sandata Mobile Connect, please contact your EVV Administrator or your EVV program's Customer Support.

Sandata Mobile Connect © operates under U.S. Patent Nos. 5,835,575 and 5,949,856, which are owned by Sandata Technologies, LLC Copyright ©2019 Sandata Technologies, LLC. All rights reserved.

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# (begins with the number 2 or 3 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.

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.

Set up and credentialing: Initial set up

▶ Enter the New Password

▶ Confirm Password

▶ Click **SUBMIT** after entering the new password.

The Login screen displays. The employee can now use the new password to login.

TIP

Passwords are case sensitive. They must be at least 12 characters long, have at least one upper case, one lower case letter, one numeric character and one "special" character (i.e. @#$%^).

Set up and credentialing: Initial set up

▸ After successfully logging in with the new password, the next screen prompts the employee to select a language preference from a drop-down list on the screen.

▸ Available languages are based on program configuration.
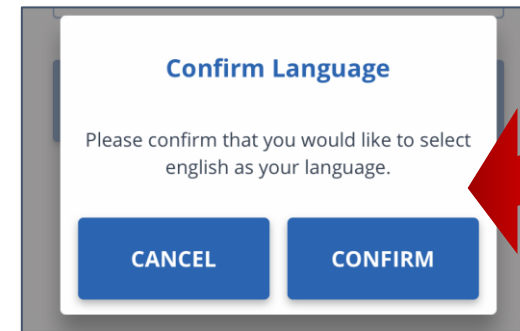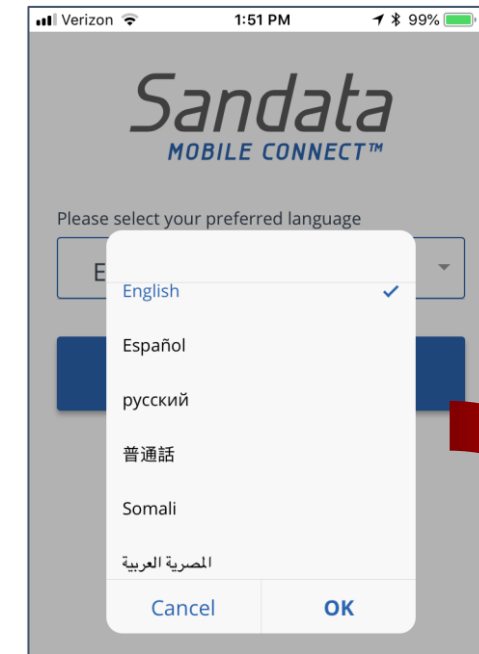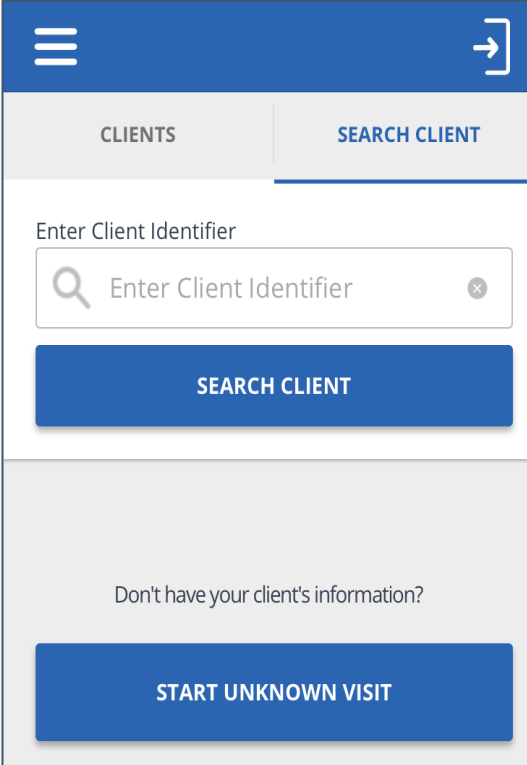
Navigating the home screen

Navigating the home screen

Upon successfully logging in to SMC, the user is presented with the Home screen. From this screen *(based on configuration)*, the user is able to:

▸ View upcoming schedules

▸ Search for a client to start a visit by tapping in the **ENTER CLIENT IDENTIFIER** field and enter the ID to search for the client.

▸ Start an unknown visit by tapping **START UNKNOWN VISIT** to enter the client's name and Medicaid ID in order to start the visit.

Navigating the home screen

The user can also tap the menu icon in the upper-left corner of the screen to access:

▶ **My Visits** – view upcoming and past visits (based on configuration)

▶ **Clients** – to perform a client search

▶ **Settings** – to change language preference and password. All other options on the settings screen are disabled

▶ **GPS Map –** displays the current map location of the caregiver

▶ **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)
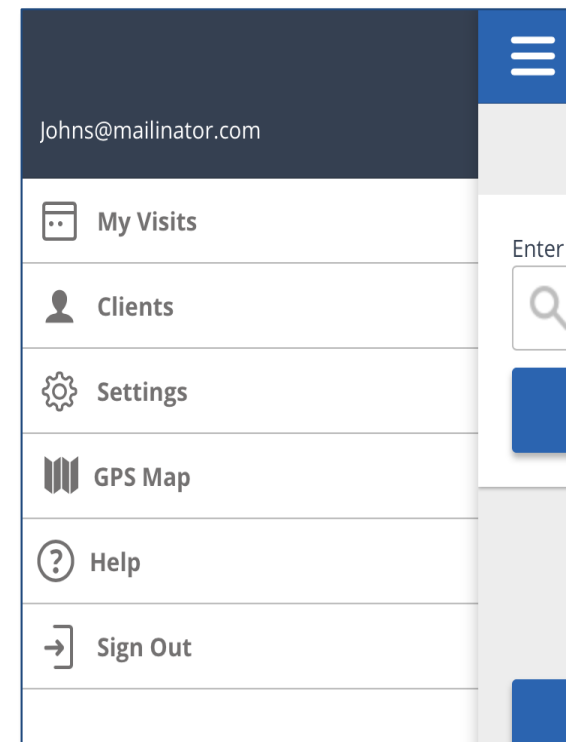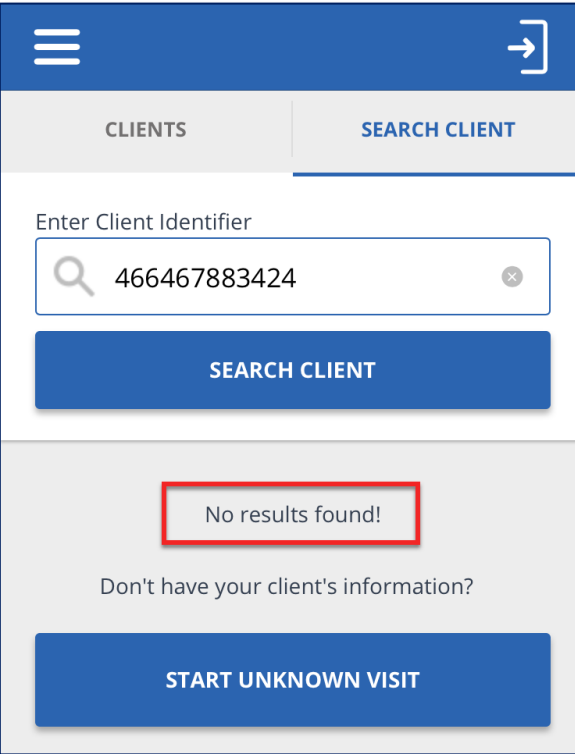
Starting a visit

Starting a visit

When the employee arrives to provide care to the client, he or she will:
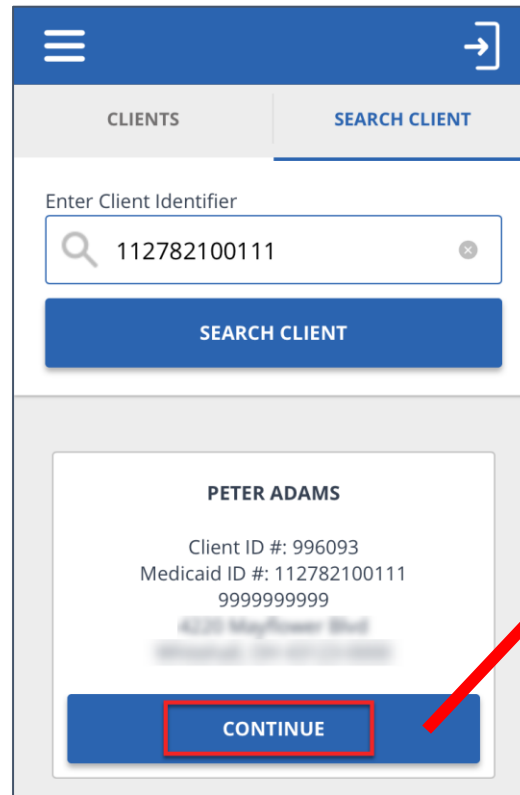
1. Log in to SMC.

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).
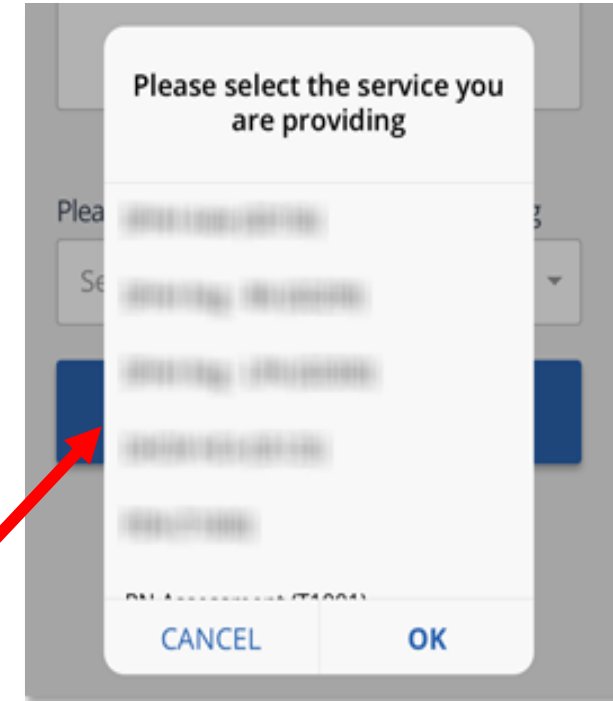
Starting a visit

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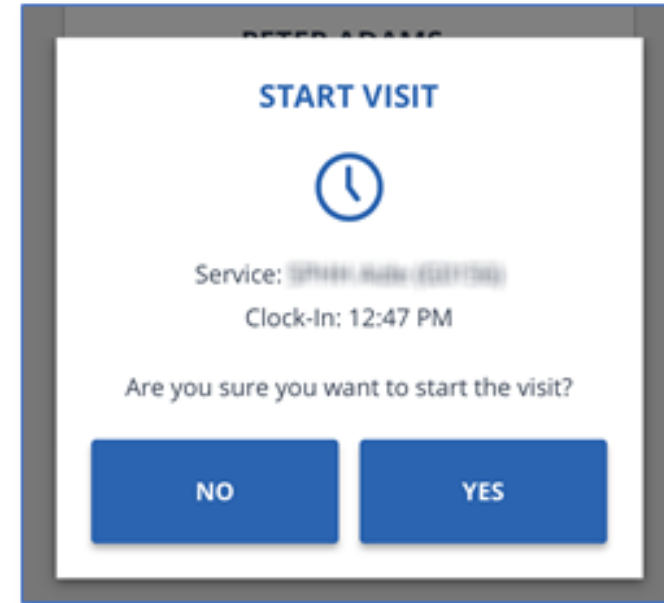
5. Select the *Service* from the drop-down list.

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.

START VISIT

Service:

Clock-In: 12:47 PM

Are you sure you want to start the visit?

NO   YES

To ensure security, after seven (7) minutes of inactivity the employee is automatically logged out of SMC. A pop-up appears after 5 minutes warning of inactivity time-out and remains displayed for an additional 2 minutes.
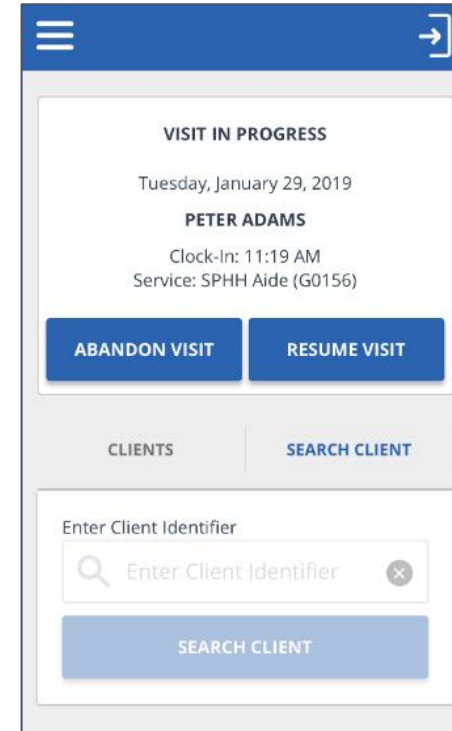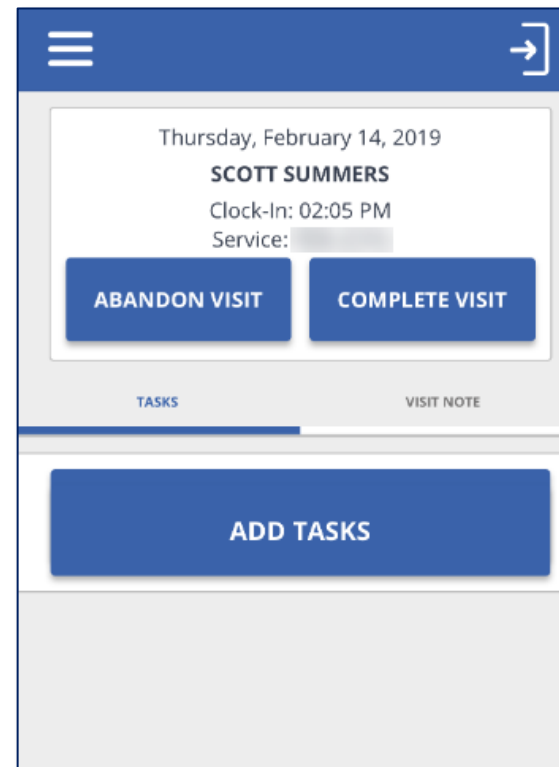
Completing a visit

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.

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.
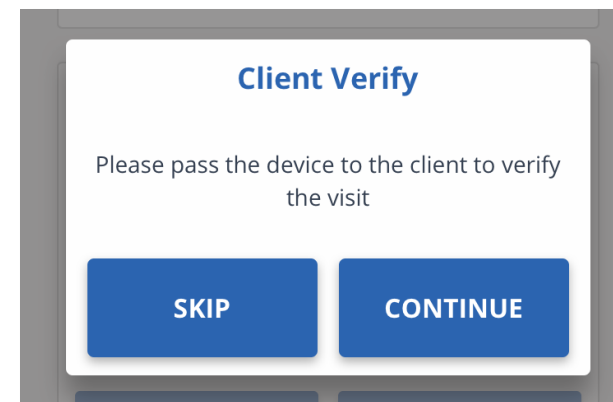
6. Tap **COMPLETE VISIT**.

Completing a visit

7. The *Visit Summary* screen displays.

8. Tap **CONFIRM**.
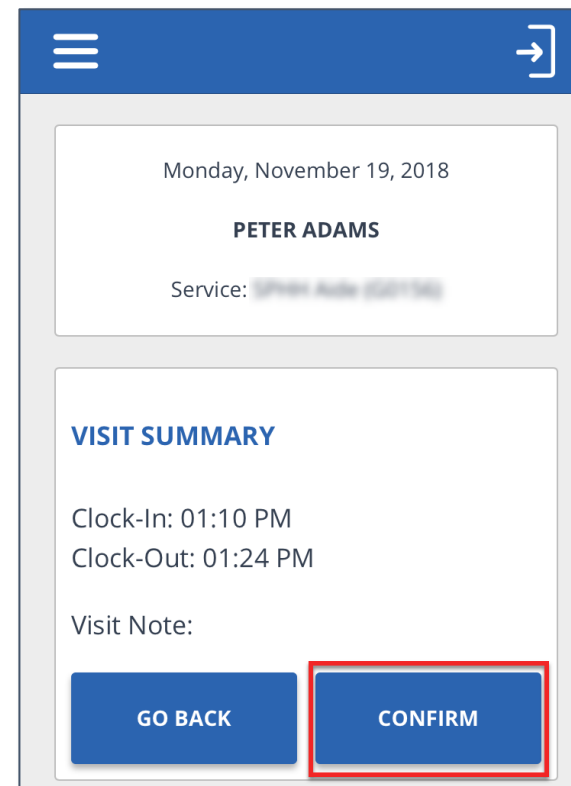
Completing a visit

9. The Client Verify screen displays.

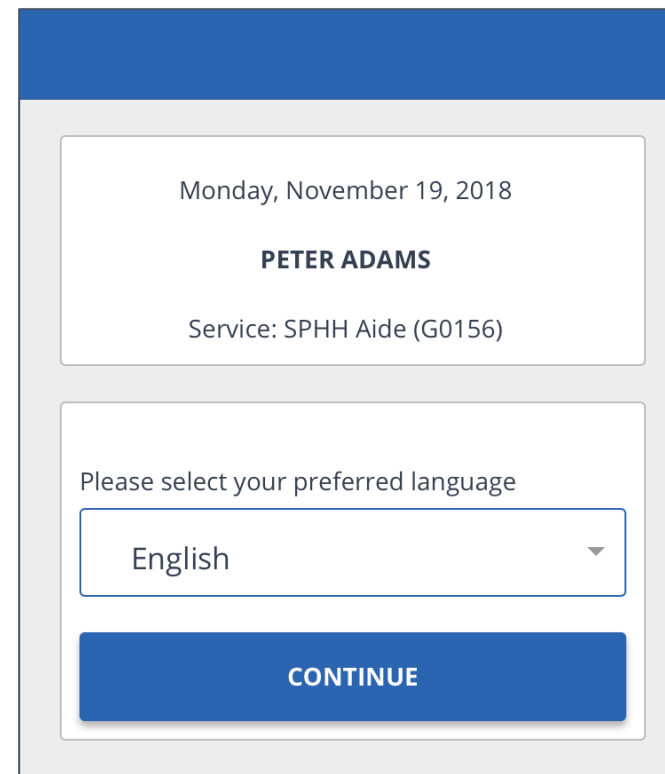10. Tap **CONTINUE** and pass the device to the client or tap **SKIP**.

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**.

Monday, November 19, 2018

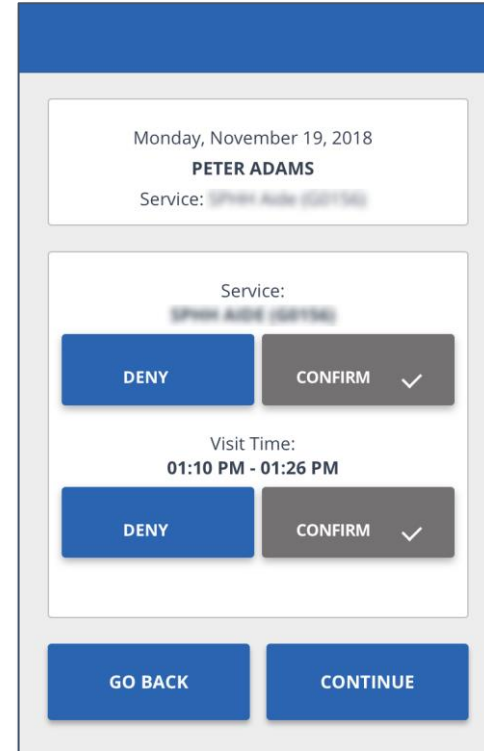**PETER ADAMS**

Service: SPHH Aide (G0156)

Please select your preferred language

English ▾

CONTINUE

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.


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*.
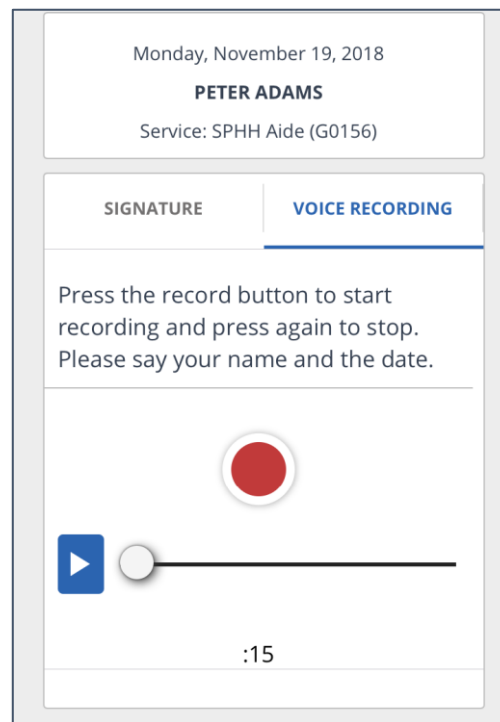
Completing a visit

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.
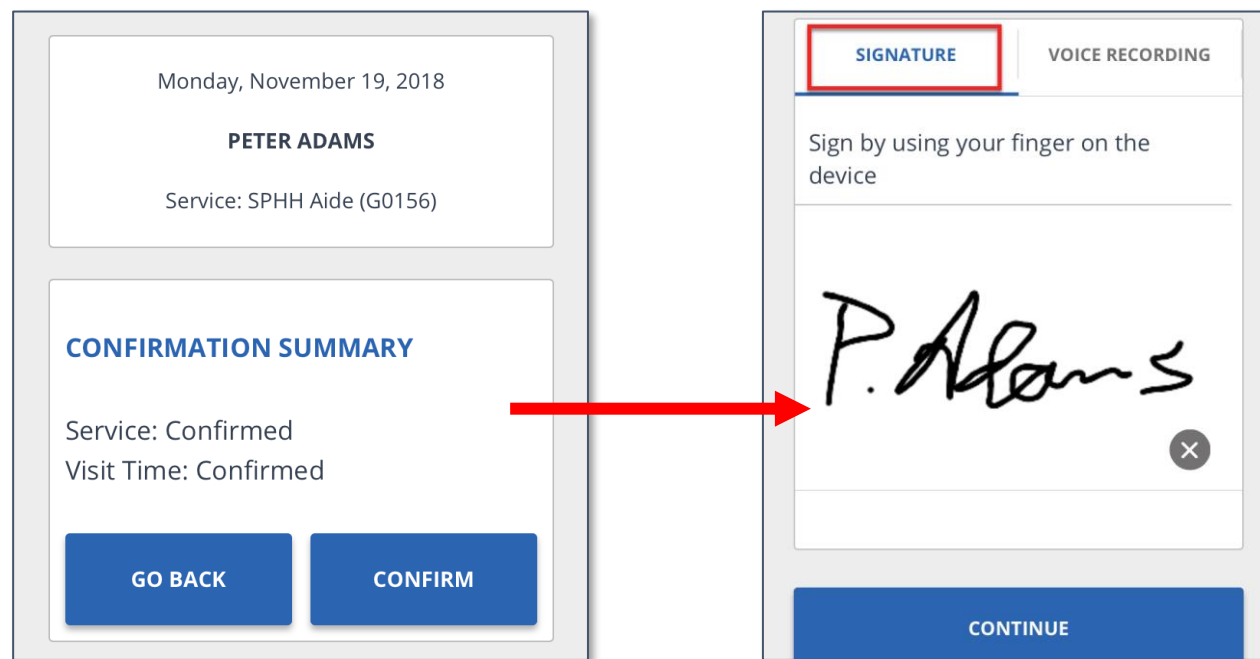
Completing a visit

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.
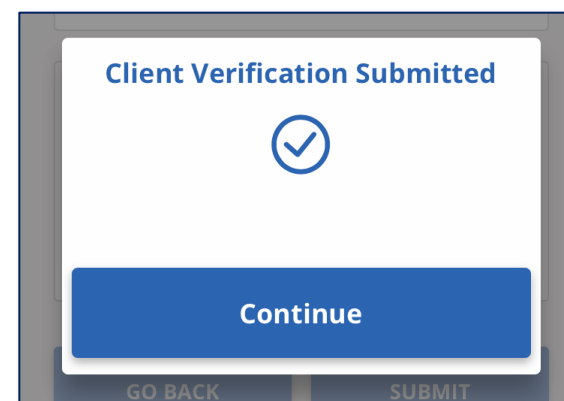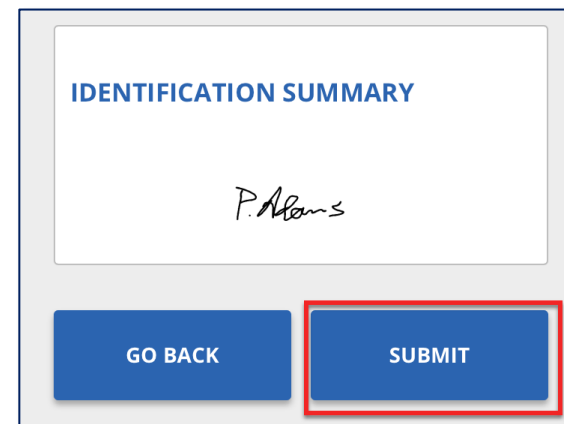
:15

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. Tap **SUBMIT**.
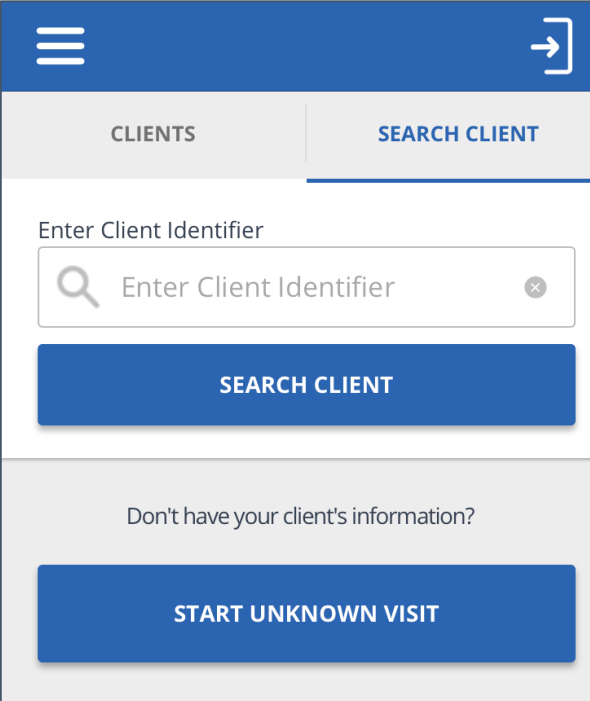
18. Tap **CONTINUE**.

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 SMC
2. Tap **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 *

First Name

LAST NAME *

Last Name

MEDICAID ID #
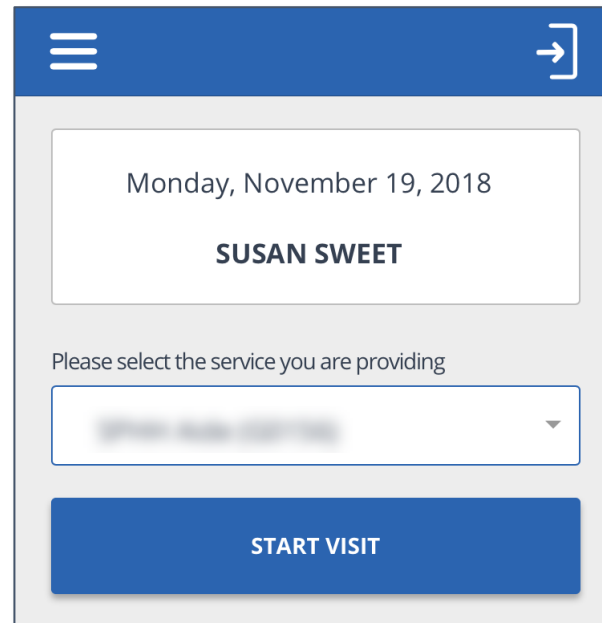
Medicaid Id #

*denotes required field

CANCEL   CONTINUE

Starting an unknown visit

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

Questions...