Sandata

Get more right from the start

Sandata Mobile Connect V2
Communication & Training Plan

Communication & Training Plan

- This plan is a living document

- It will be updated as needed and as we progress into the project

- Ideas for communications or training engagements are welcome and will be reviewed when received

- Any questions or ideas can be directed to your CSM or TAM

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SMC 2.0 Communications Plan- Phase I

Purpose:

- Awareness of launch, its features, and benefits

- Helping users and stakeholders how it addresses their needs or solves their problems

- Better Adoption showcasing its advantages, usability, and potential impact on their work

- Providing the support materials, such as documentation, tutorials, FAQs, and customer support channels

Engagement	Audience	Type	Expected Date
Announcement	State Sponsors/Key Customer Contacts	CSM Email with Leadership Letter	6/15
	Release Note Subscribers	Leadership Email	6/20
New Feature Teasers	Release Note Subscribers	Email	1. Simplified Sign In- 6/22 2. Guided Process- 7/6 3. Hype Video email – 7/13 4. Improved Offline Performance- 7/22 5. Improved Password Reset Process- 7/29
Launch Date Go-Live	All SMC Users	Message on App	7/15
App Available Announcement	All SMC Users, State Sponsors/Key Customer Contacts	Message on App, Email, In app, SoD Banner	TBD (upon confirmation it's available in both app stores)

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SMC 2.0 Training Materials* Plan

> **Purpose:**
>
> - To provide seamless transition of materials from Sandata Mobile (v1) to Sandata Mobile Connect (v2) via the Caregiver Start Up Library
>
> - To maintain v1 training materials for Caregiver Start Up Library until Oct 15 for those using v1
>
> - To provide appropriate in app help for v1 in v1 and v2 in v2
>
> - To transition instructor led training from v1 to v2

Engagement	Includes	Expected Date
Caregiver Start Up Library (in Sandata On-Demand)	Deploy all updated documents & new feature videos to SoD • New configuration to support v1 and v2 materials • Create new feature documents & videos • Update existing feature documents with new UI • Create new "Successful Visits Start to Finish" video	7/7
	Update all *UI update only* SMC videos	TBD
SMC In App Help	Create & deploy SMC 2.0 in app help- English	7/15
	Create & Deploy in app help- non-English	TBD
Instructor-Led Training Materials*	Update all current VC-SMC training materials to include new features & updated UI	7/15

* **Note:** These include EVV, EVV-AMP, and SAM.

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SMC 2.0 Migration Support Plan

Purpose:

- Provide support to Provider Agencies to migrate their caregivers from v1 to v2
- To provide toolkits of Agency to Caregiver communication templates, job aids, training videos
- Provide Go-Live Support
- Work with Project Managers & CSMs to implement current onboarding customers directly to v2

Engagement	Planned Content	Expected Date
Caregiver Migration Support Library via Sandata-On-Demand	• Communication Templates • Newsletter Articles samples • Infographic Job Aids	6/22 initial launch Will keep adding
State Sponsor/Key Customer Contact Demos	Presentation & Demos of new app UI and features	Began wk of 6/19
SMC 2.0 Lunch & Learn Webinars	Create & Deploy in app help- non-English	Beginning wk of 7/7
Office Hours to support initial go-live	• Demonstrations • Q&A • New App download support • New App initial sign-in support	Beginning 7/15 Schedule and Frequency TBD
SMC 2.0 Migration Support in Sandy Bot	Update materials to support migration	7/15
Migration Monitoring	• Sandata Team will monitor migration progress- frequency TBD • Sandata will create additional communications, tools and support based upon data	7/15/23 – 7/15/24