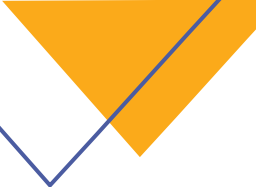




Sandata

Get more right from the start

Introduction to New
Sandata Mobile Connect



Introduction to New Sandata Mobile Connect

Welcome.

We will be starting shortly.

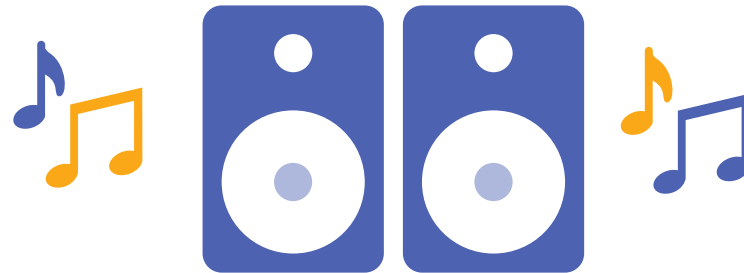
Music Credits:

Paradise and Summer Evening by AShamaluevMusic (<https://www.ashamaluevmusic.com/>)

Sport Future Bass by Alex Productions No Copyright Music (<https://soundcloud.com/alexproductionsmusic>)

Sound Check

Take a moment to ensure your audio is functioning correctly.



(You should hear music.)



Sandata

Get more right from the start

Sandata Mobile Connect (SMC) for
Sandata Agency Management

Objectives

- ▶ 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

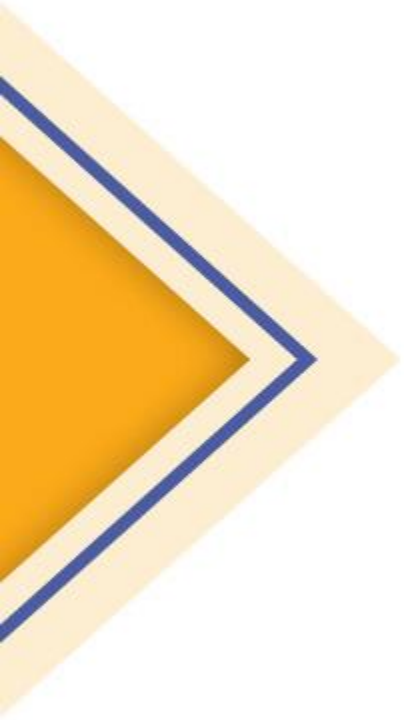
Introduction

Sandata Mobile Connect (SMC) is an app that can be installed on a mobile device or Wi-Fi-enabled tablet that 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 Telephone Visit Verification (TVV) and vice versa, if required.



Set up and Credentialing



Set up and Credentialing

SMC user credentials are generated when the employee is created as Staff in Sandata Agency Management and enabled as a mobile app user.

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

- Username (a valid email address recommended)
- Check the **Mobile App User** checkbox under *Security* in the Staff record

Trainer, SMC

System Login Privileges

☐ This Staff Member can log into the system as User. ☒ **Mobile App User**

Initials:

Username: [Reset Password](#)

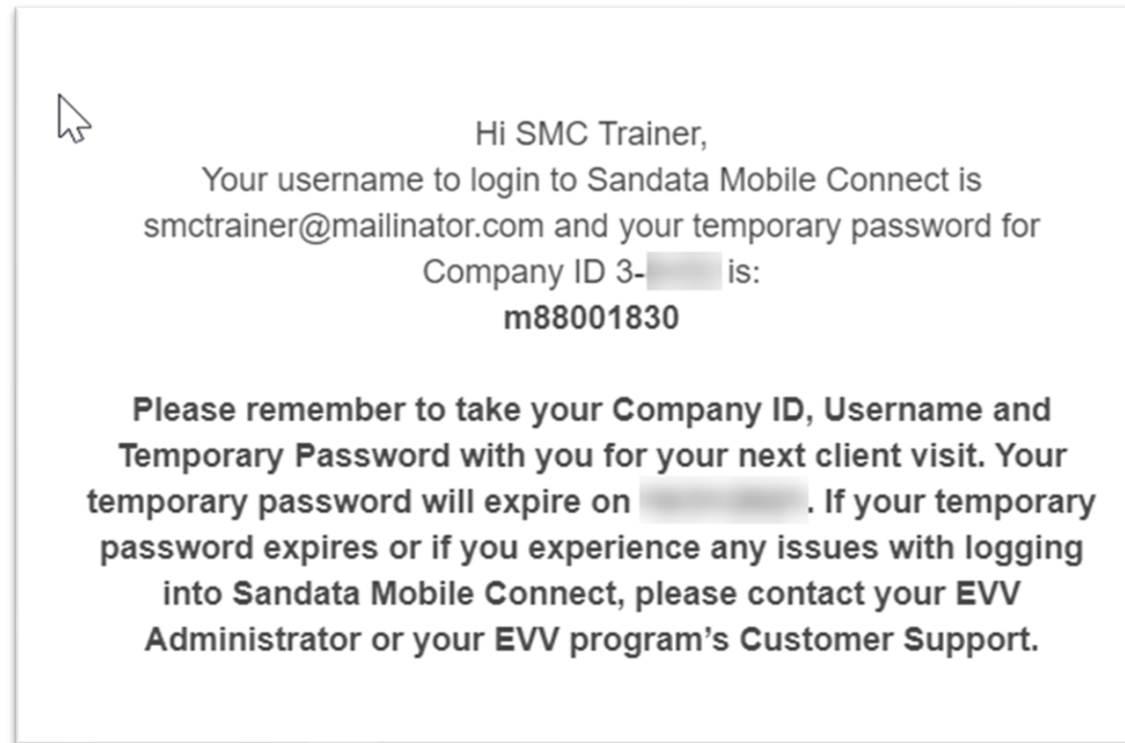
☐ This User is a System Administrator.

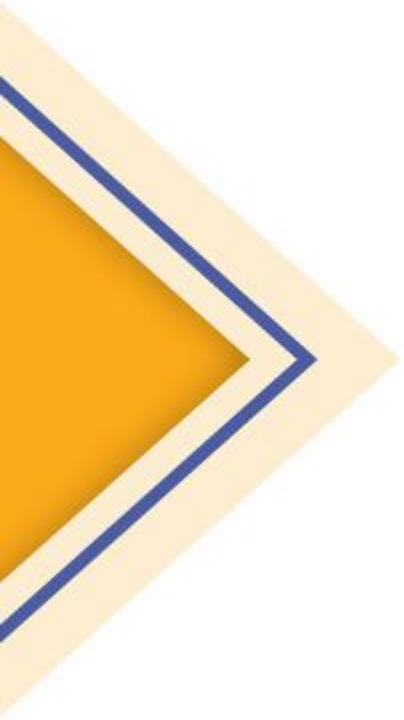
Unique Permissions

Section	Permit	Enable	Add
A/R	In Collection	☐	☐
Admin	Change Company or Location	☐	☐
Admin	EVV Task Reading to EC	☐	☐
Admin	EVV Task To Service	☐	☐
Admin	Generate Schedules	☐	☐
Admin	Merge Clients	☐	☐

Set up and credentialing

When these values are captured and the employee record is saved, Sandata Agency Management generates a temporary SMC password and sends it to the email address entered.





Downloading SMC

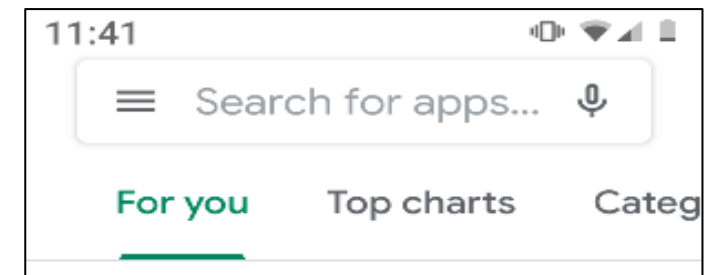


Downloading the App

- ▶ Download the app using your preferred app installation service or use the standard device tools
- ▶ Tap on the APP store icon for Apple devices or the Play store for Android devices

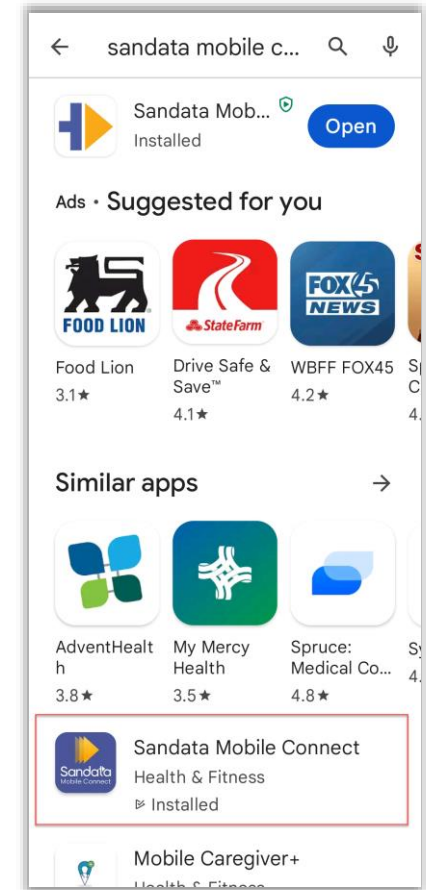
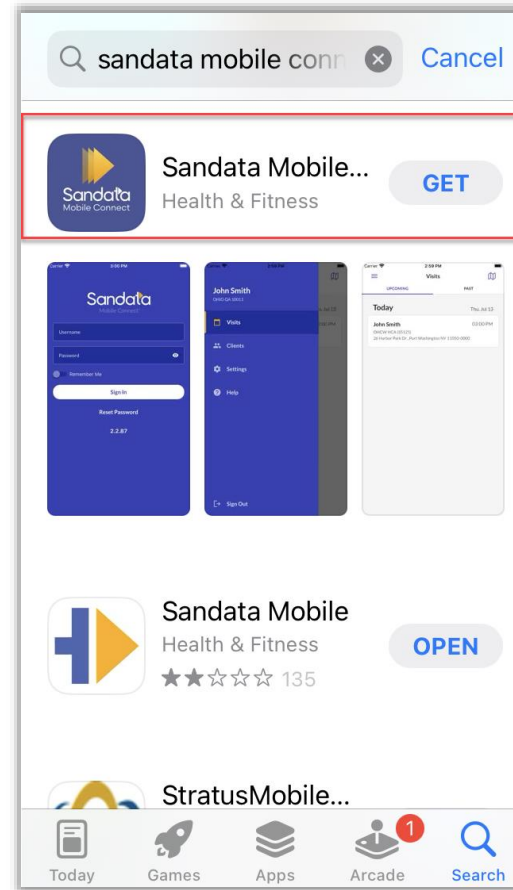


- ▶ Type '**Sandata Mobile Connect**' into the search field



Downloading the App

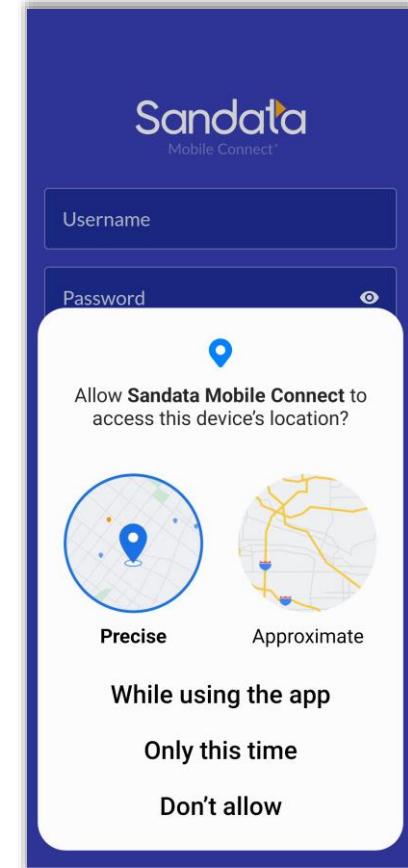
- ▶ The original version and the newest version will be visible (scroll the list of suggested apps may be required)
- ▶ Select the new Sandata Mobile Connect Logo!



Set up and credentialing: Initial set up

When the employee launches SMC for the first time, he or she will be prompted to once again enable several permissions for the app to function properly.

- ▶ The location services (GPS) will need to be enabled

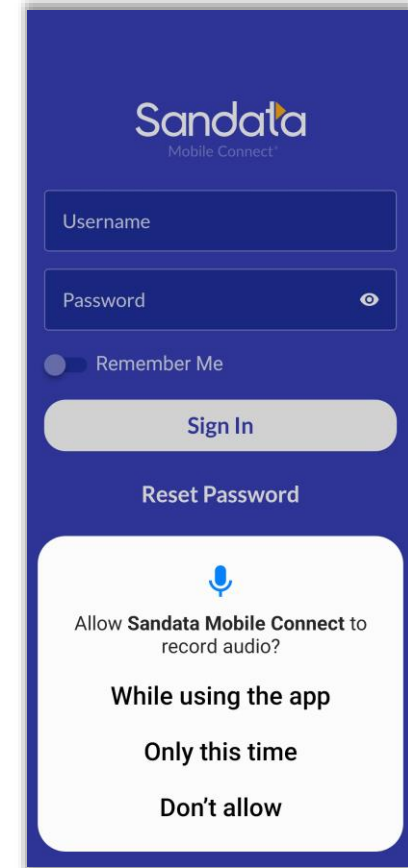


App Permissions

Set up and credentialing: Initial set up

When the employee launches SMC for the first time, he or she will be prompted to once again enable several permissions for the app to function properly.

- ▶ The location services (GPS) will need to be enabled
- ▶ Agencies configured for client confirmation will need to enable the microphone, if prompted.

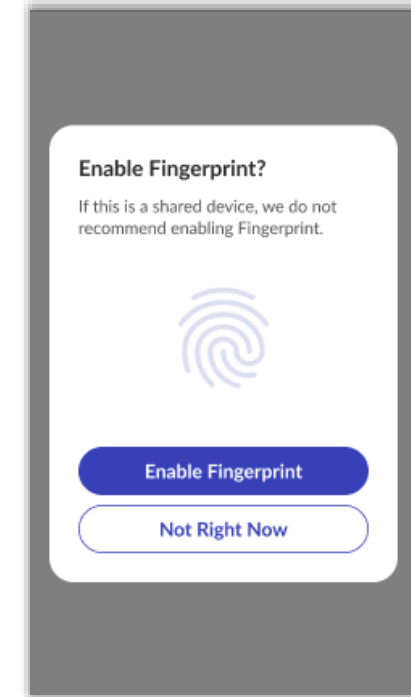


App Permissions

Set up and credentialing: Initial set up

When the employee launches SMC for the first time, he or she will be prompted to once again enable several permissions for the app to function properly.

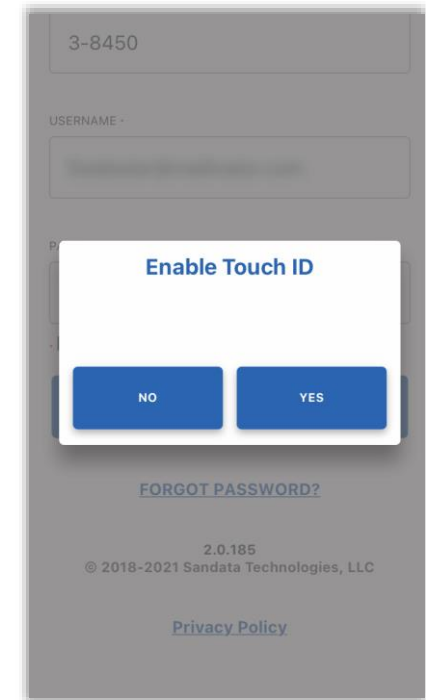
- ▶ The location services (GPS) will need to be enabled
- ▶ Agencies configured for client confirmation will need to enable the microphone, if prompted.
- ▶ If the device has facial or fingerprint recognition settings enabled, SMC will automatically prompt to enable as a setting. This setting can be changed in the app menu options.



App Permissions

Set up and credentialing: Initial set up

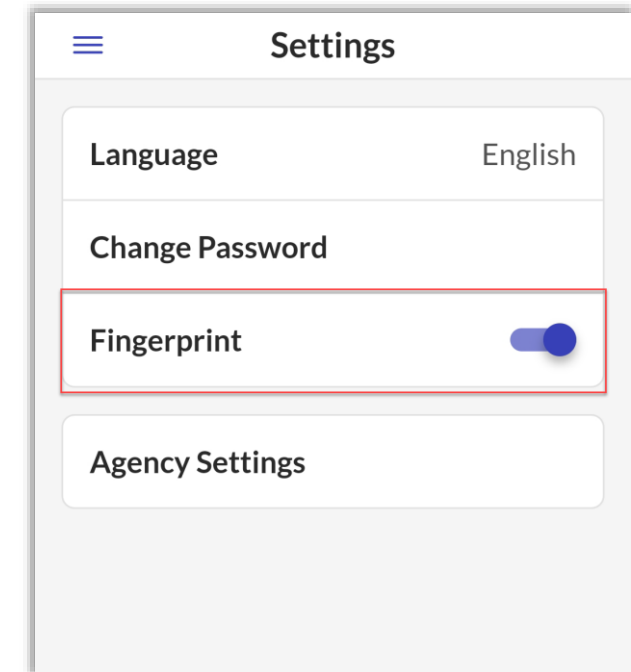
- ▶ If the device has facial or fingerprint recognition settings enabled, SMC will automatically prompt to enable as a setting
- ▶ The type of setting (face or fingerprint) available will depend on the mobile device used
- ▶ This pop up only appears the first-time logging in to a device with the settings enabled
- ▶ Select **YES** or **NO** to enable this feature



App Permissions

Set up and credentialing: Initial set up

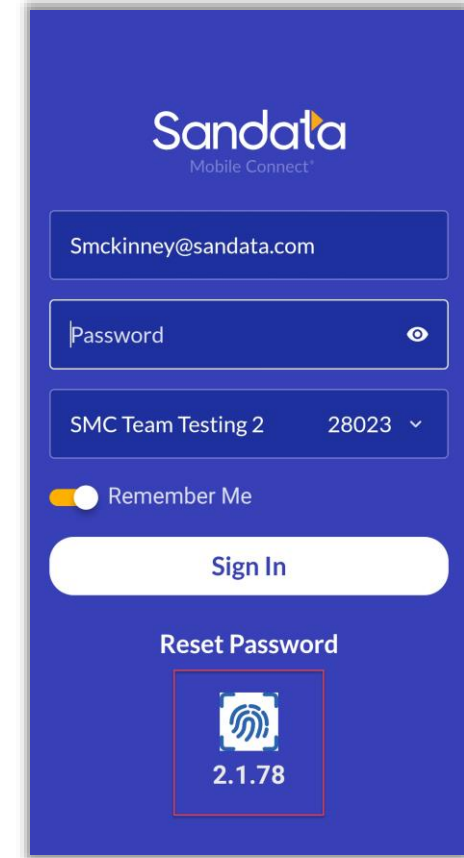
- ▶ After the fingerprint or face recognition has been enabled, that setting can be changed once the user completes the logon process to SMC
- ▶ Once logged on, under the menu bar, the user can select the toggle control to update this functionality



App Permissions

Set up and credentialing: Initial set up

- ▶ After the settings have been enabled, the user's password will be entered into the password field by using fingerprint or facial recognition
- ▶ Sandata Mobile Connect (SMC) password will expire and need to be updated
- ▶ If you log into SMC using face or your fingerprint recognition and the password is expired, the reset password screen will automatically appear to update the password

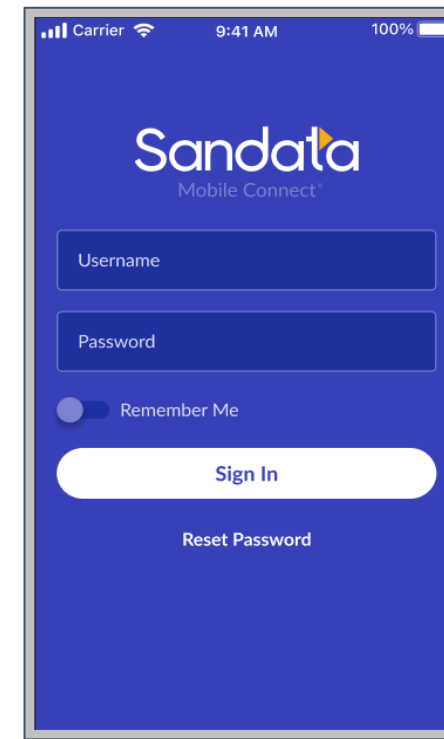


App Permissions

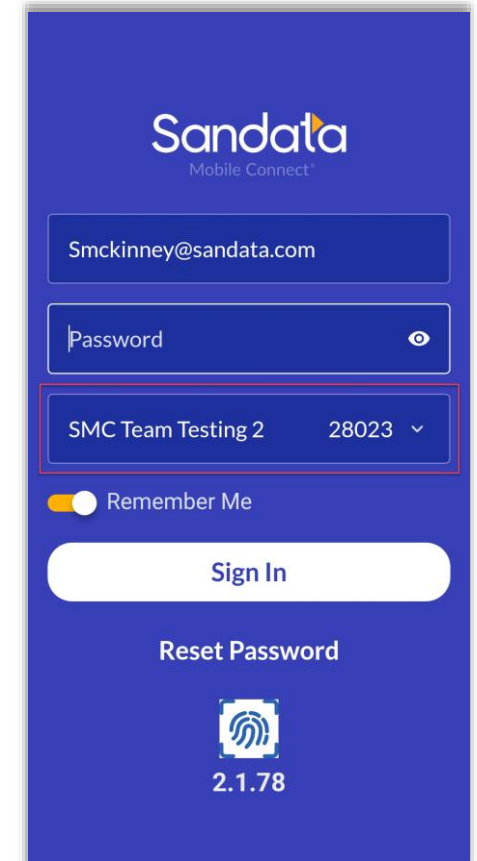
Set up and credentialing: Initial set up

When the employee logs in to SMC for the first time, he or she will need to enter the following data elements:

- ▶ **Username:** email address
- ▶ **Password:** the temporary password emailed/created when employee was enabled
- ▶ Caregivers with access to multiple agencies will see a drop-down menu to select the agency name/number.



A screenshot of the Sandata Mobile Connect login screen. The screen has a blue background with the Sandata logo at the top. Below the logo are two input fields: 'Username' and 'Password'. There is a 'Remember Me' toggle switch below the password field. At the bottom, there is a 'Sign In' button and a 'Reset Password' link.



A screenshot of the Sandata Mobile Connect login screen, showing an additional step for agency selection. The 'Username' field contains 'Smckinney@sandata.com' and the 'Password' field is empty. Below the password field, there is a red-bordered box containing a drop-down menu with 'SMC Team Testing 2' selected and the number '28023' with a downward arrow. Below this box is a 'Remember Me' toggle switch. At the bottom, there is a 'Sign In' button, a 'Reset Password' link, and a fingerprint icon with the version number '2.1.78'.

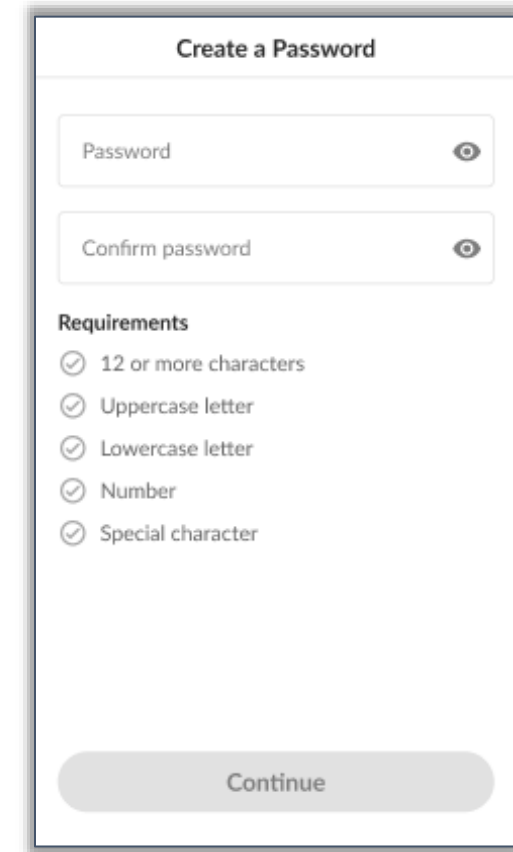
Set up and credentialing: Initial set up

- ▶ Enter the New Password
- ▶ Confirm Password
- ▶ Click **Continue** after entering the new password.

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



Tapping the eye icon in the password field displays the password. Displaying the password can help with initial log-in and temporary password entry.

A screenshot of a mobile application screen titled "Create a Password". It features two input fields: "Password" and "Confirm password", each with an eye icon to the right. Below the fields is a "Requirements" section with five checked items: "12 or more characters", "Uppercase letter", "Lowercase letter", "Number", and "Special character". At the bottom is a grey "Continue" button.

Create a Password

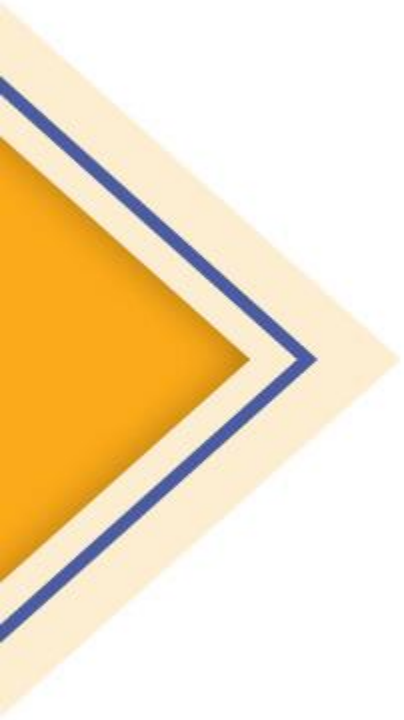
Password

Confirm password

Requirements

- ✓ 12 or more characters
- ✓ Uppercase letter
- ✓ Lowercase letter
- ✓ Number
- ✓ Special character

Continue



Navigating the home screen

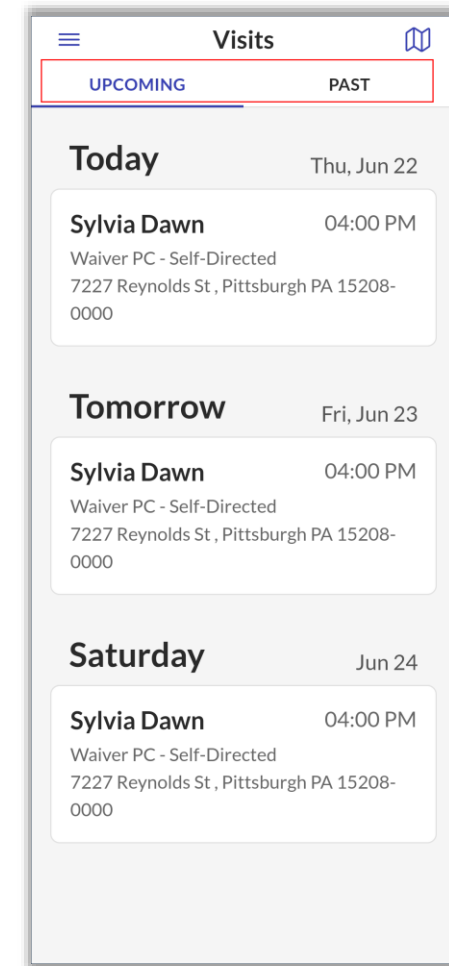


Navigating the home screen

Upon successfully logging in to SMC, the user should be presented with the **Visits** home screen.

From this screen (*based on agency settings*), the user can select the appropriate tab:

- ▶ View **UPCOMING** schedules – displays visit details that have been assigned to the employee.
- ▶ View **PAST** schedules – displays completed visits that were assigned to the employee.



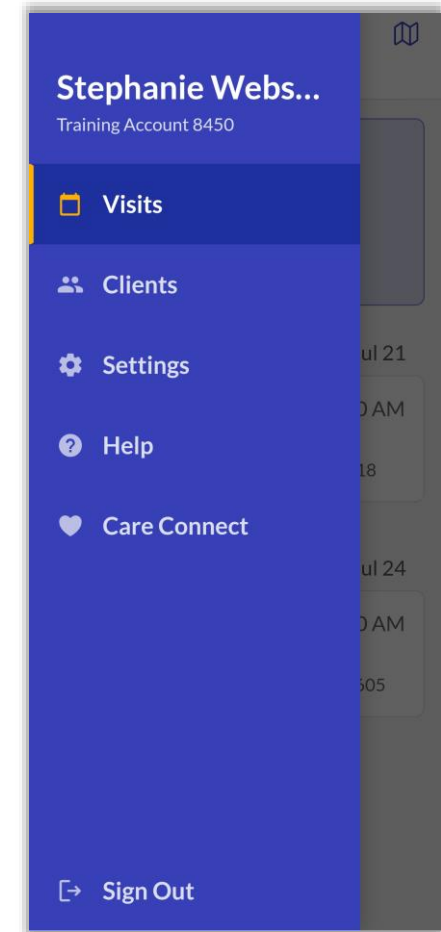
Navigating the home screen

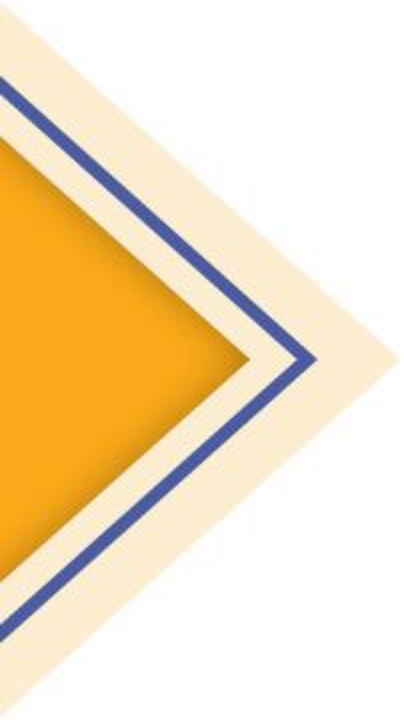
The user can tap the menu icon in the upper-left corner of the screen to access:

- ▶ **Visits**
- ▶ **Clients**
- ▶ **Settings**
- ▶ **Help**
- ▶ **CareConnect**
- ▶ **Sign Out**



Options and settings based on agency settings





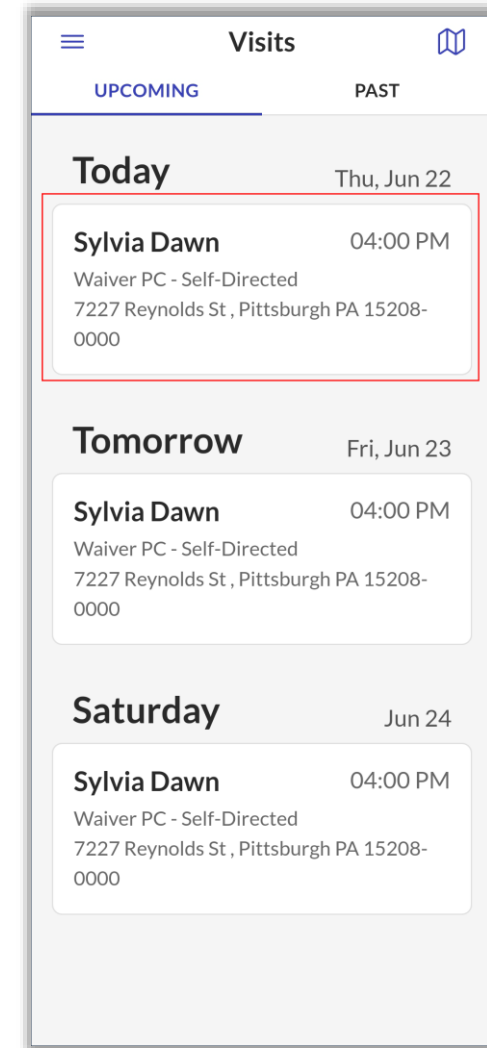
Starting a visit



Starting a visit

When the employee arrives to provide care to the client, he or she will:

1. Log in to SMC.
2. Under the **UPCOMING** tab of *VISITS*, scheduled visits assigned to the employee will display the client information and schedule details.
3. Tap the client's name to start the visit.

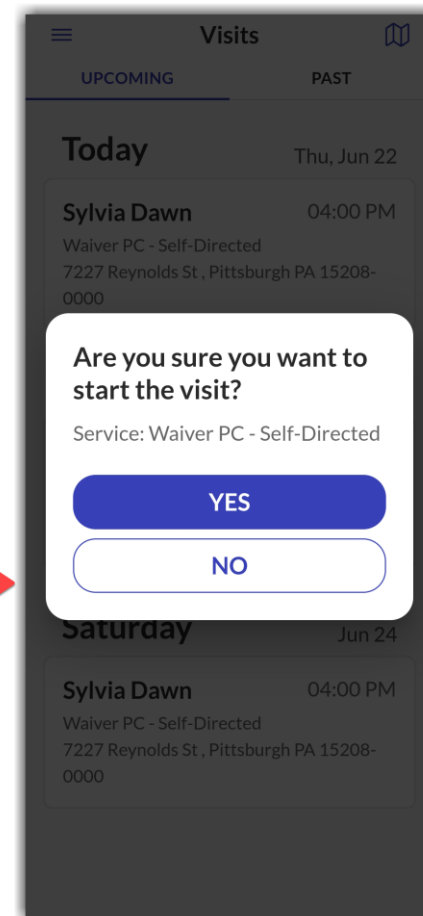
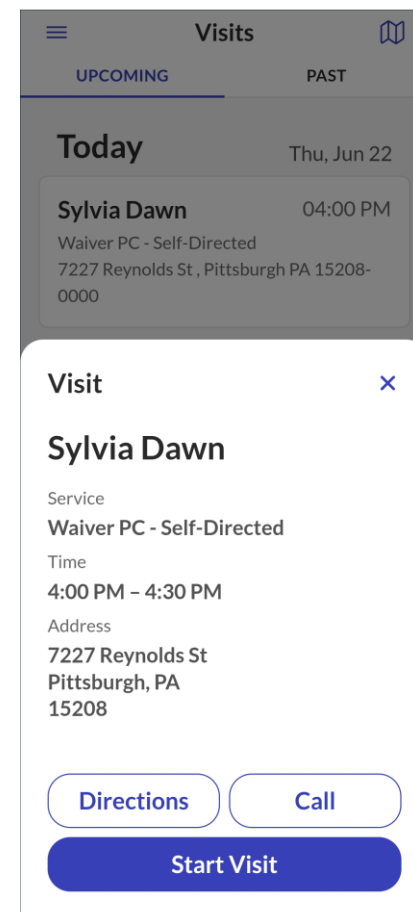


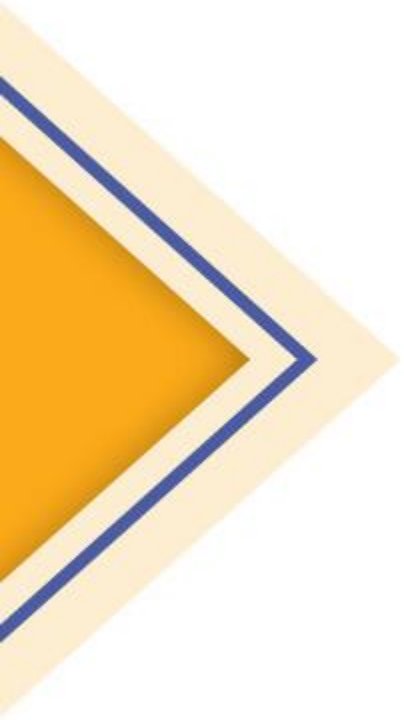
Starting a visit

4. Tap the **Start Visit** button when the visit details display.
5. Tap **YES** to confirm the start of the visit.
6. Log out of SMC and proceed with providing care.



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.



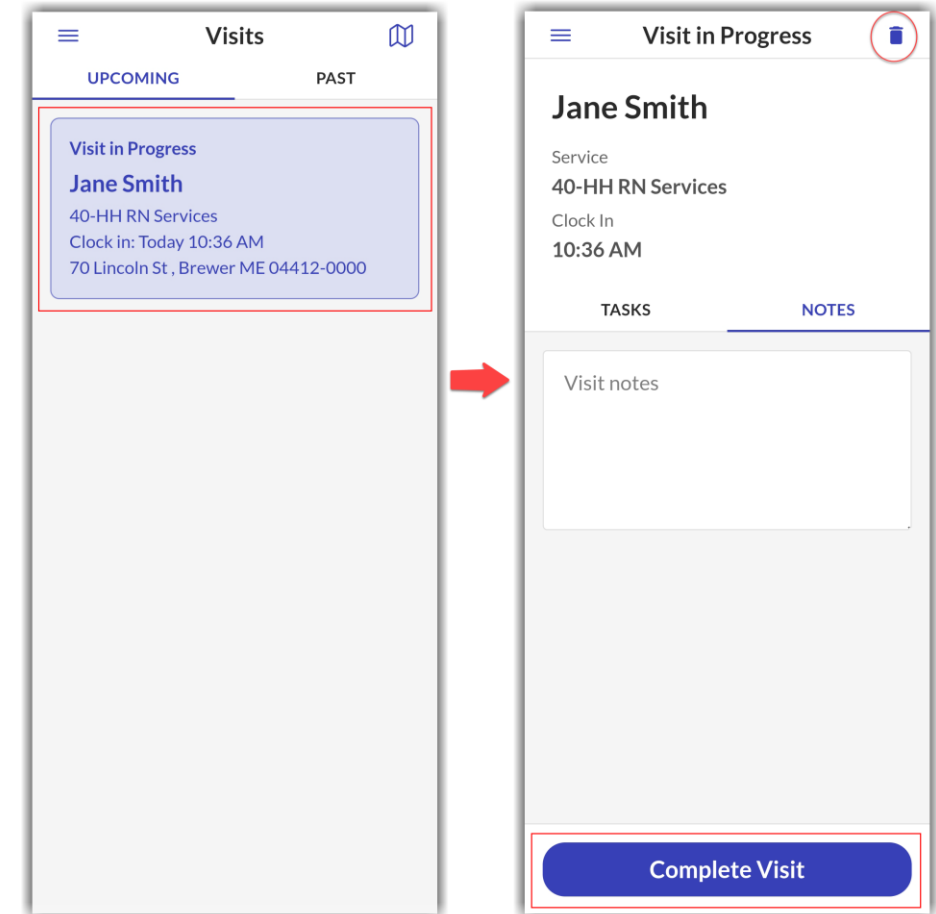


Completing a visit



Completing a visit

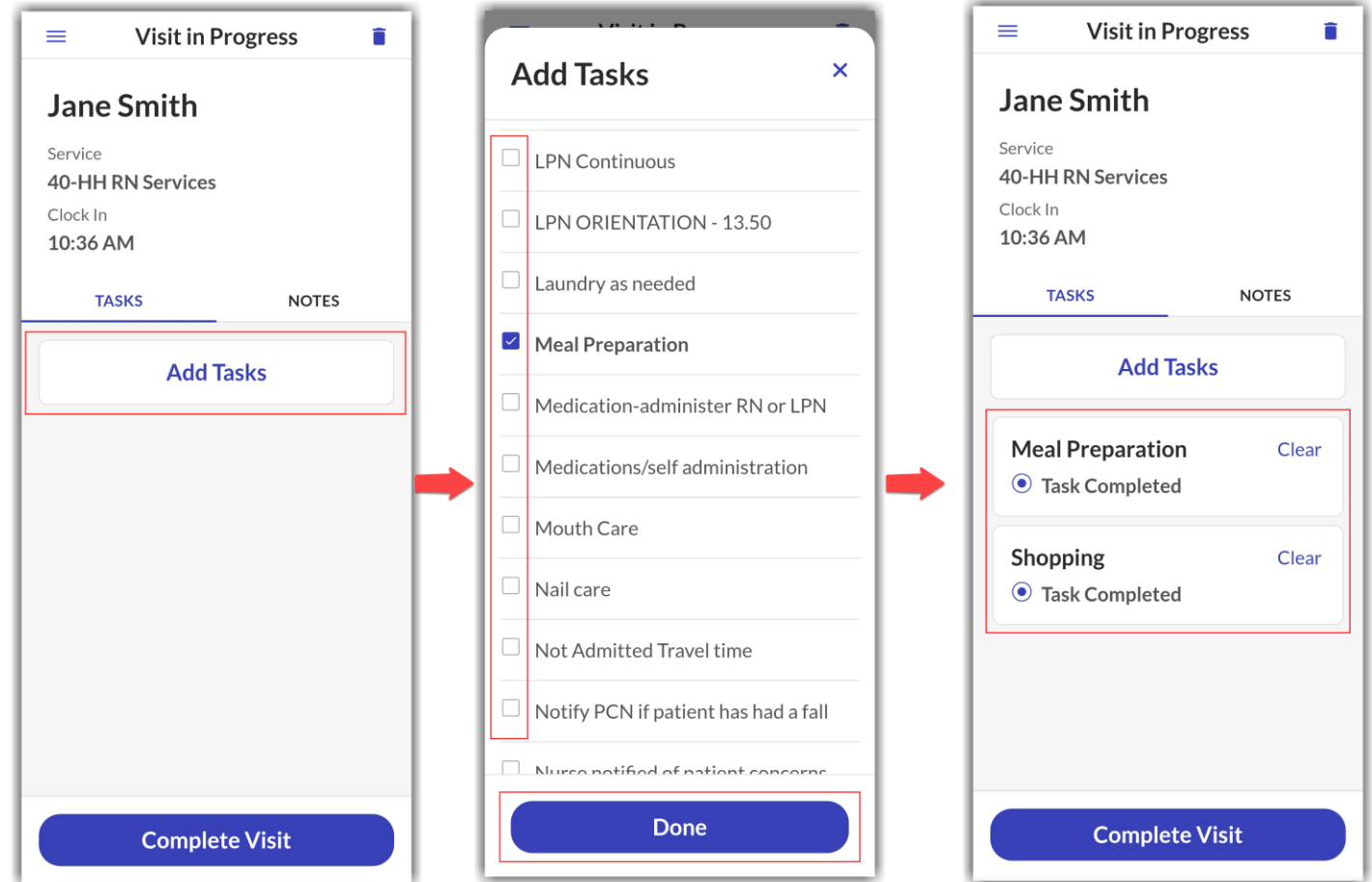
1. Caregiver will log in to SMC.
2. Under Visits, tap name of the client as the **Visit in Progress**
3. Complete the required:
 - Tasks (optional setting)
 - Observations (optional setting)
 - Notes
4. Tap **Complete Visit** or abandon the visit using the trash can () in the upper left-hand corner



Completing a visit - Tasks

Tasks may be required to be completed as part of the visit.

1. Tap **Add Tasks**
2. The *Add Tasks* menu selection screen displays.
3. Check the appropriate task to add to the visit.
4. Close the add tasks or scroll to the bottom of the list and tap the appropriate option to complete the task.



Completing a visit - Notes

If additional information is needed to be included on the visit record, tap **NOTES**. The agency will determine if this is a required field.

Enter text related to the visit in the comments section.

The visit note will be visible under the note icon on the *Schedule Detail* as a completed note.



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.

Visit in Progress

Jane Smith

Service
40-HH RN Services

Clock In
10:36 AM

TASKS NOTES

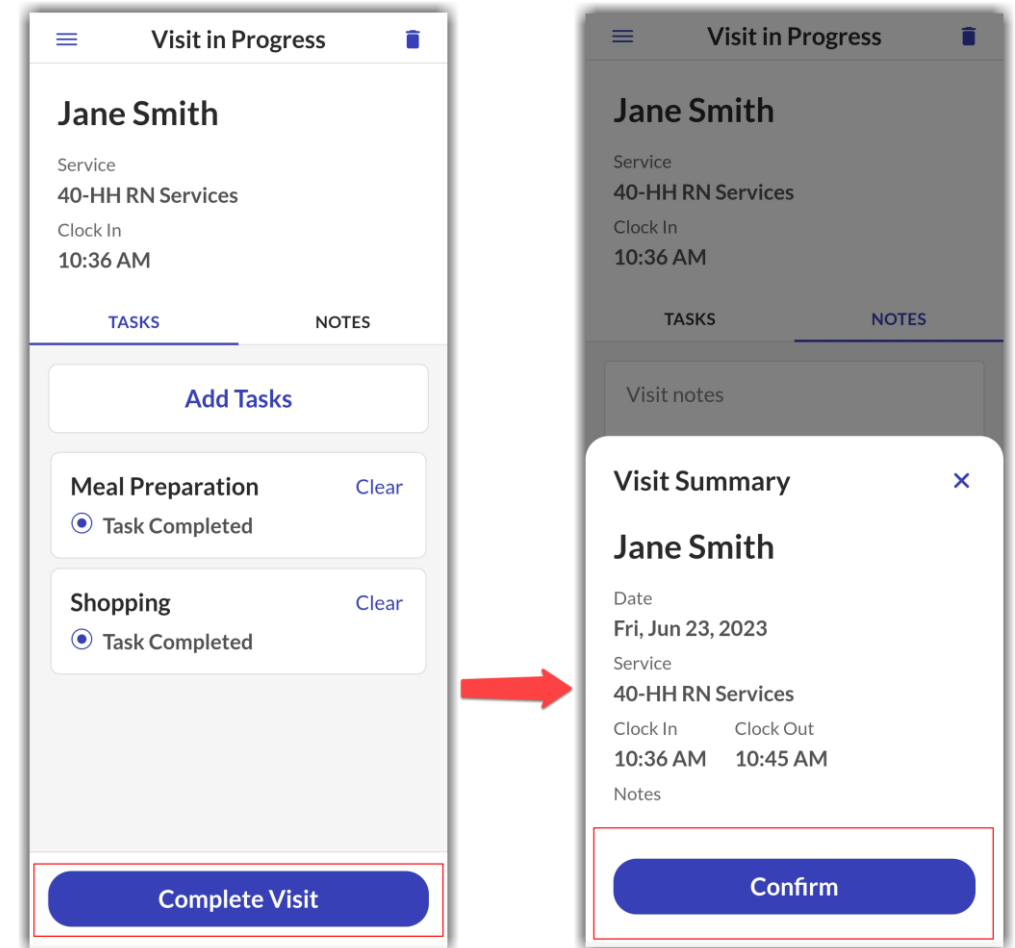
Visit notes

Complete Visit

Completing a visit

Once the tasks have been confirmed and any notes have been added, the visit can now be marked as completed.

- ▶ Tap **Complete Visit** to verify the visit details.
- ▶ Tap **Confirm** for the visit summary and submit the visit as complete.
 - If client confirmation is not turned on, this completes the visit.
 - For client confirmation, pass the device to the client to complete the confirmation

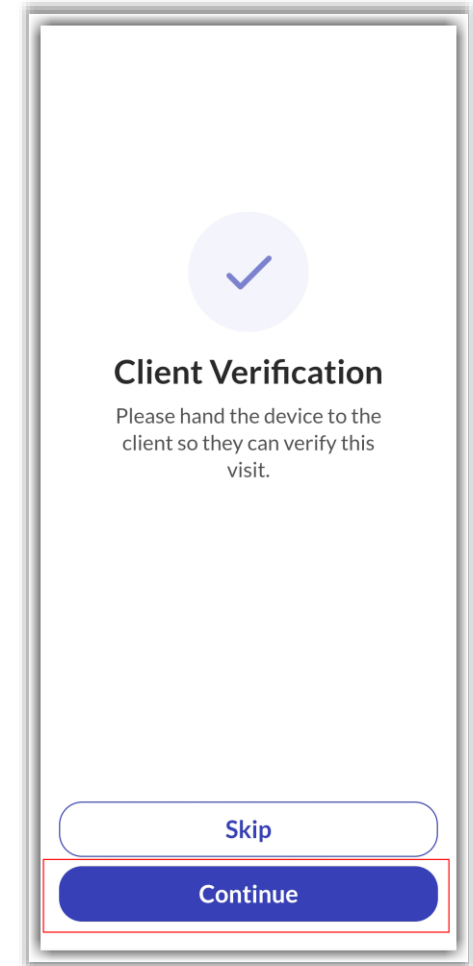


Completing a visit

Once you tap confirm to complete the visit, the *Client Verification* displays to verify the visit **BY THE CLIENT**.

The device should be passed to the client to complete the next steps.

1. The client should tap **CONTINUE** to confirm the visit.
2. If the client is unable or unwilling to confirm the visit, tap **Skip** to complete the visit without confirmation and end the visit.

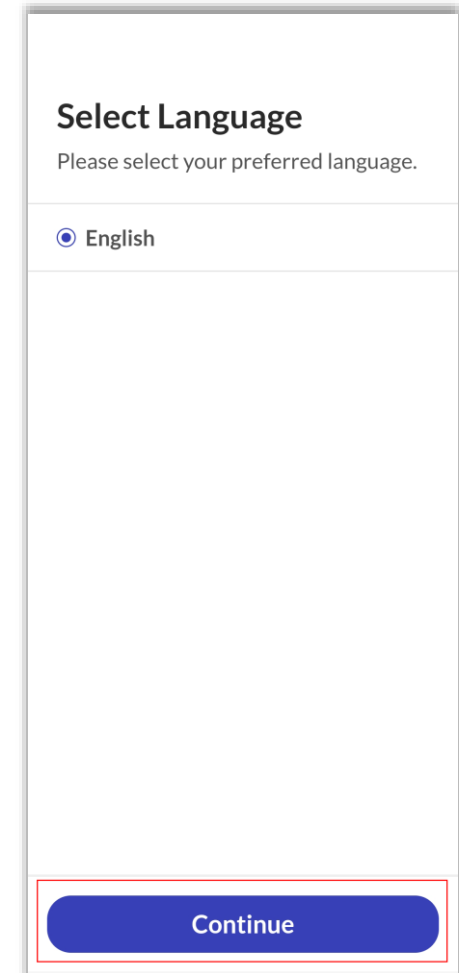


Completing a visit

If additional languages have been enabled, the next prompt will allow the client to select their preferred language.

1. The client will select the preferred language based on the agency available options or use the default **English**.
2. The client will select **Continue** to proceed to the verification.

Once the language is selected, the app will translate into the new language for the client.



Select Language

Please select your preferred language.

☒ English

Continue

Completing a visit

1. The client should tap **Confirm** for the *Services* and tap **Confirm** for the *Visit Time*.
2. The client can select **Deny** if they do not want to confirm the visit.
3. Tap **Continue** to complete the verification.

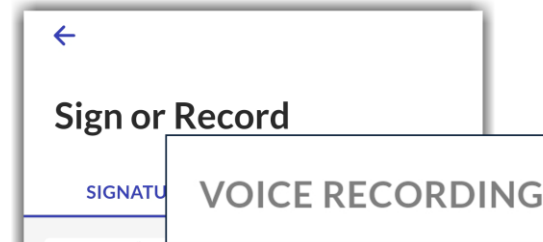


The client cannot bypass the confirmation screen; they must choose **CONFIRM** or **DENY** for each item before the **CONTINUE** button is enabled.
If the client taps **DENY** for either item on the visit, an exception is created for the visit in Sandata Agency Management *Santrax Maintenance*.

A mobile app interface for confirming a visit. It features a back arrow at the top left, followed by a greeting 'Hello, Emily' and a prompt 'Please verify the details for today's visit.' Below this, there are two sections: 'Services' and 'Visit Time'. Each section displays a service name and duration, followed by 'Confirm' and 'Deny' buttons. At the bottom, there is a large blue 'Continue' button. Red boxes highlight the 'Confirm' and 'Deny' buttons in both sections, and the 'Continue' button at the bottom.

Completing a visit

Visit confirmations can be completed with either the client's signature or by a voice recording of the client.

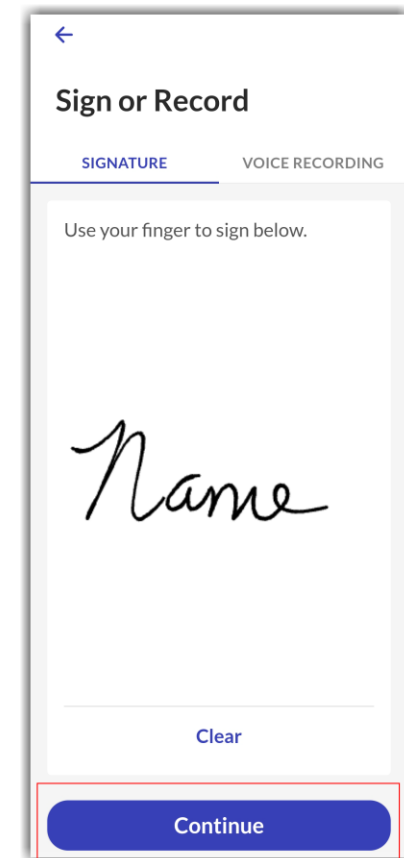


The system will only allow one form of confirmation. If you complete the signature and the voice recording, you will be prompted to select which confirmation format to submit.

Completing a visit – Signature

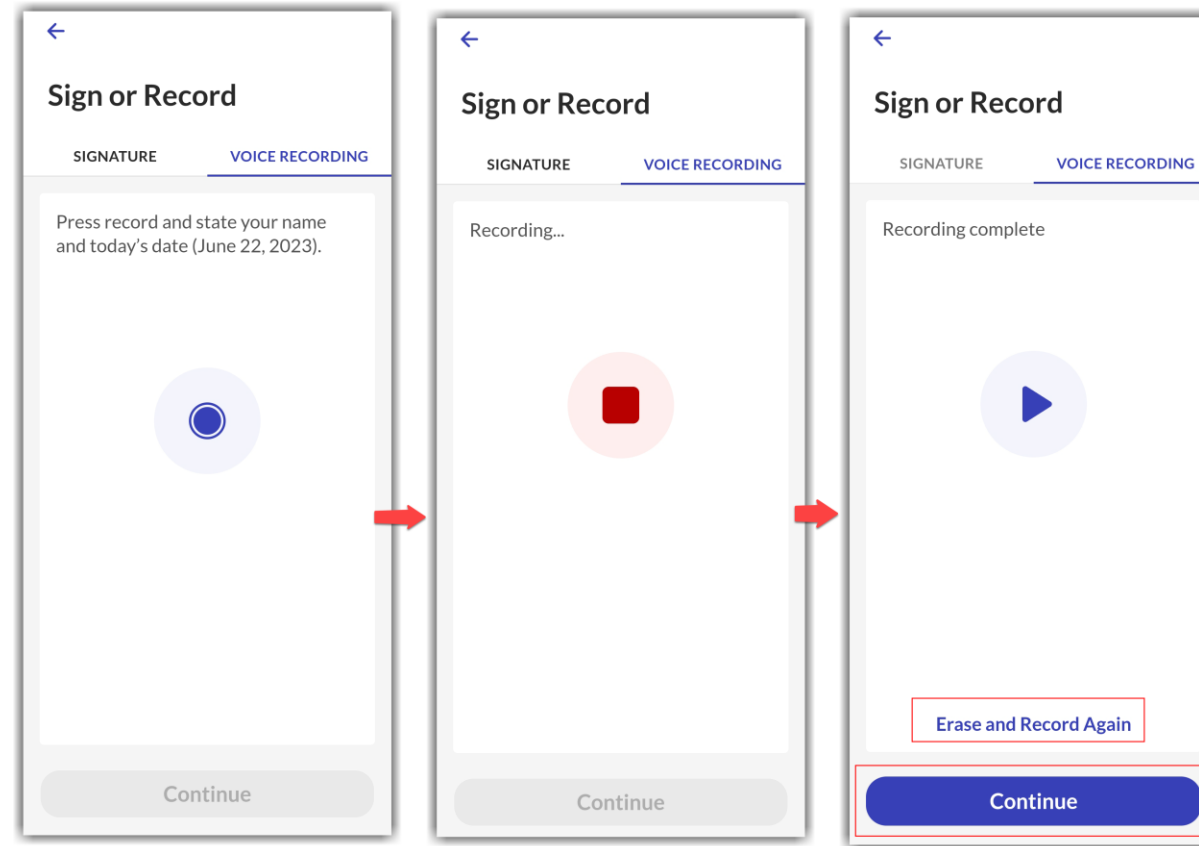
Visit confirmations can be completed with the client's signature.

1. Under the *Signature* tab, the client can use their finger (or a stylus, if one is available) to sign their name. This is a free form field.
2. Tap **Clear** to delete/clear the signature field.
3. Once the signature is added, tap **Continue** to use the signature as the confirmation.



Completing a visit – Voice Recording

As an alternative to the signature, the client can record their voice as the confirmation for the visit.

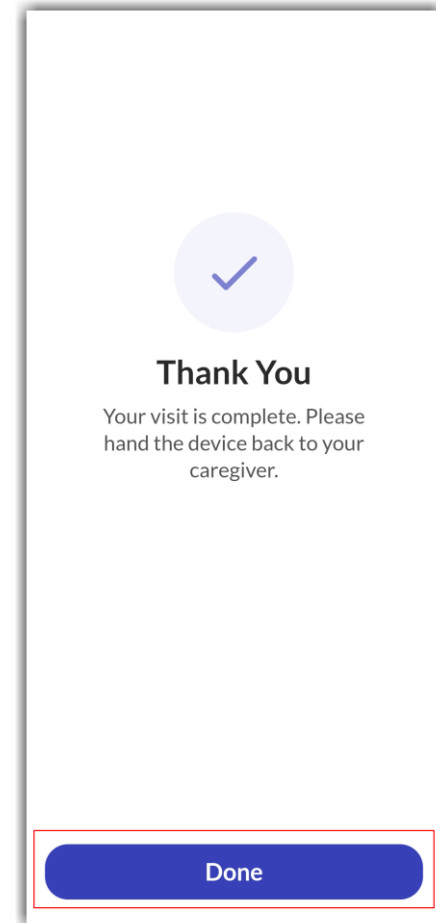


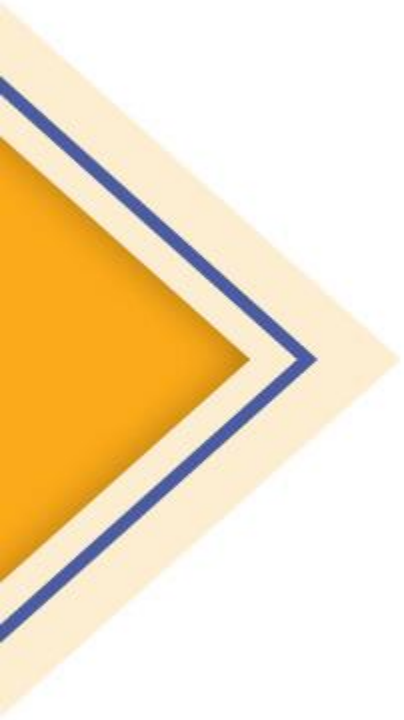
Completing a visit

- ▶ Once the confirmation has been submitted, the device can be returned to the caregiver.



Note: The device will log off once the confirmation is complete to avoid PHI/PII exposure to the client.





Starting an Unscheduled Visit



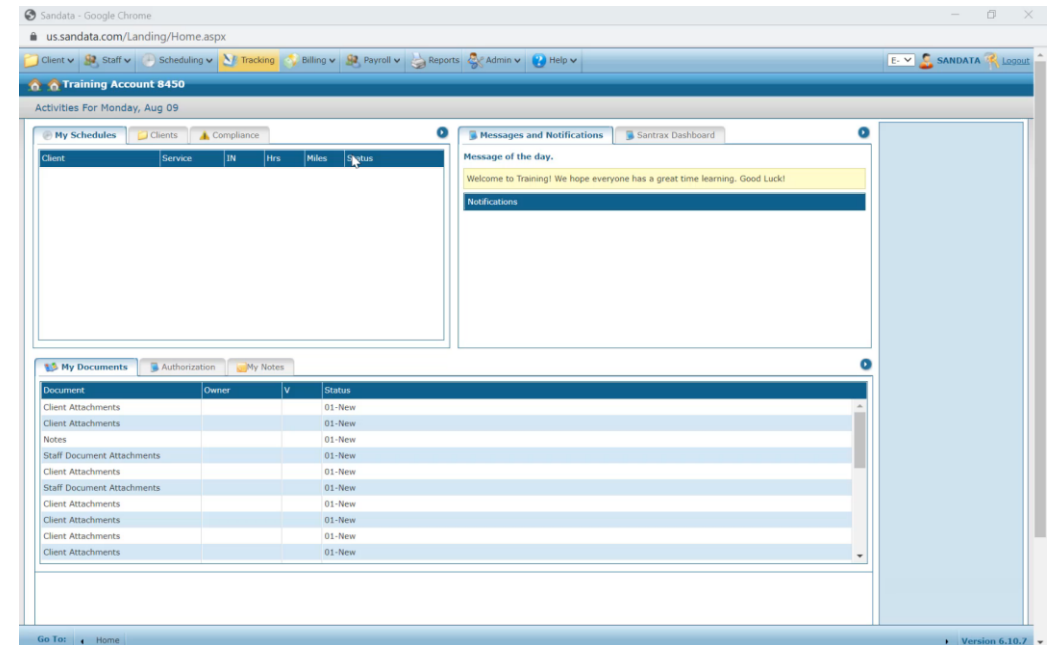
Starting an unscheduled visit

If a visit is required and it has not been scheduled, a visit can be started by using the client's unique identifier.

- ▶ If this is the first time visiting the client, search for the client using the Client Identifier. In order to search for a client, you **must** have the client identifier as you can not search by name using any PII/PHI. Adding New Clients
- ▶ Unknown visits appear in Sandata Agency Management as an *Unscheduled Event* exception and must be fixed in Santrax Maintenance with a proposed

Obtaining the Client Identifier

1. Log in to Sandata Agency Management
2. At the top menu, click on **Reports**.
3. On the left navigation, click the plus sign to expand **Client's** option. Locate and click the *Client Addresses* report.
4. Add any filter details or use the default and click **Preview** to display the report or **Export** to download the report.
5. Provide the caregiver with the **Stx ClientID**

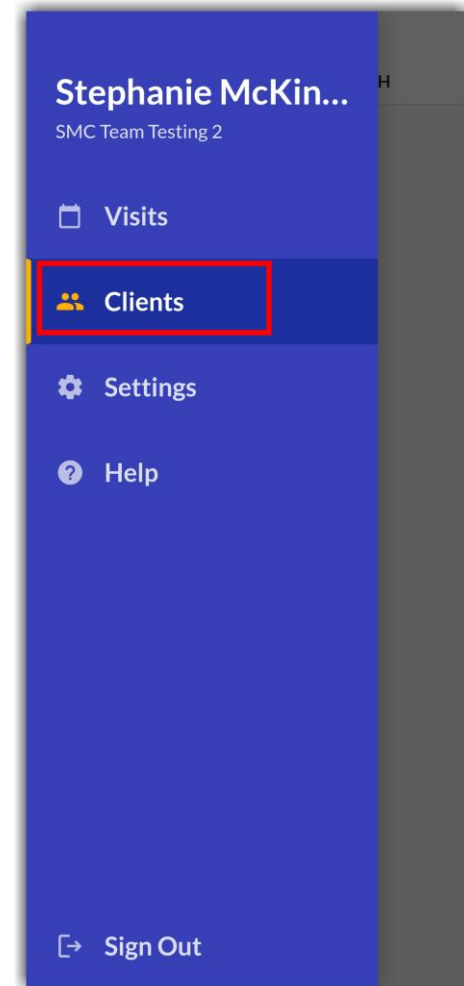


Starting an unscheduled visit – known client

- ▶ If the Caregiver is assigned clients or they have completed a visit for the client using the app, a list of previously visited clients will appear.
- ▶ Select the appropriate client's name to start the visit.
- ▶ If the client does not display, the Caregiver will need to search for the client using the client identifier.

Starting an unscheduled visit – known client

1. Caregivers will log in to SMC
2. Using the navigation options in the upper left-hand corner, click **Clients**



Starting an unscheduled visit – unknown client

1. The Caregiver will select the *Search* tab and enter the Client Identifier provided by the agency administrator into the search field and tap enter on their keyboard to perform the search.
2. The search results will display the client information. The Caregiver will tap **Start Visit** and follow the normal process to start a visit.



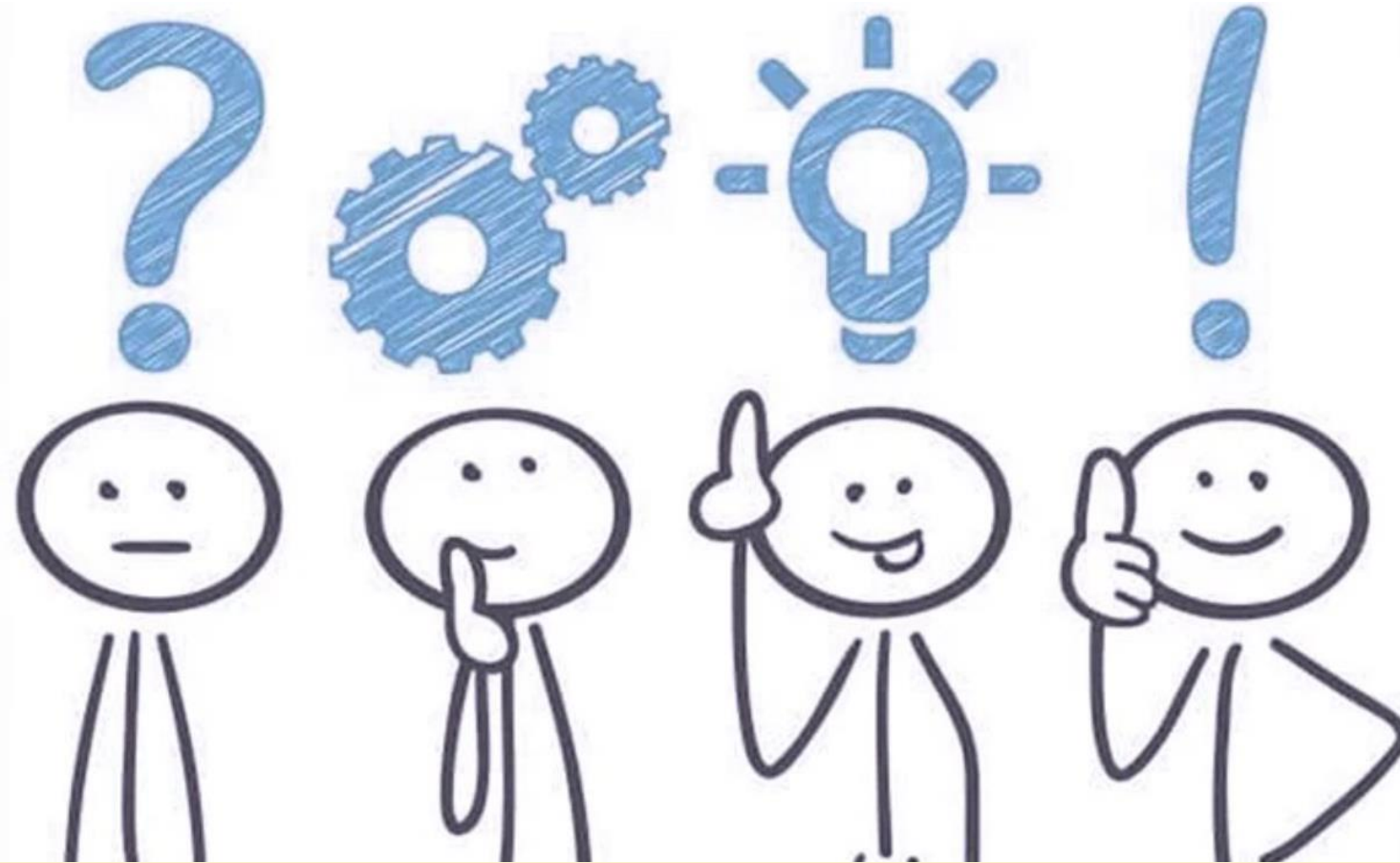
The search may not be completed using any PII/PHI such as the the client's name. This number must be provided to the Caregiver by the agency.

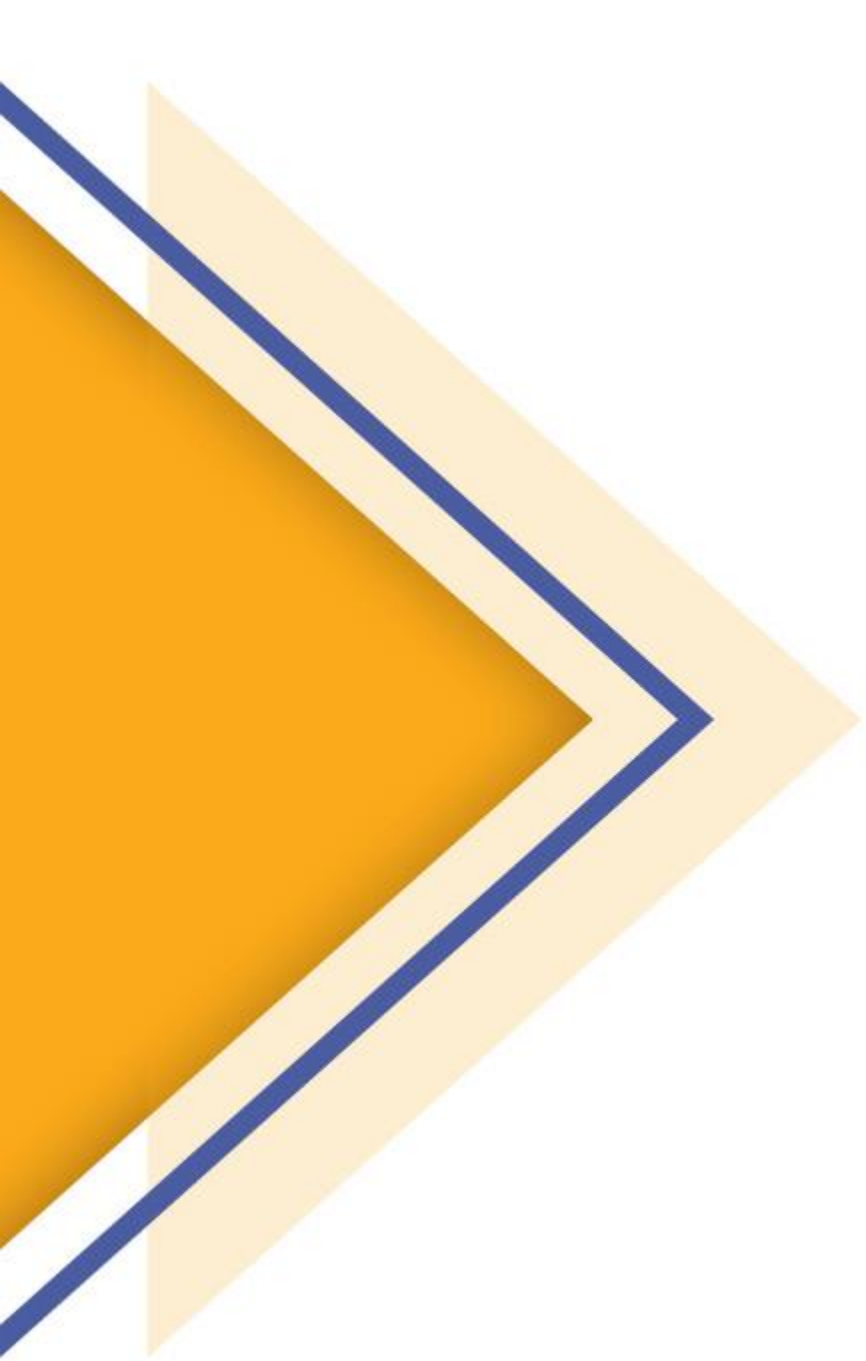
The screenshot shows the 'Clients' app interface. At the top, there are two tabs: 'CLIENTS' and 'SEARCH'. The 'SEARCH' tab is selected. Below the tabs is a search bar containing the text '717507'. Below the search bar, the client information for 'Amy Tucker' is displayed. The information includes: Client ID 717507, Medicaid ID 0000123059, Address 1600 Pennsylvania Ave, Washington, DC 20006--0000. Below the address, there are three buttons: 'Directions', 'Call', and 'Start Visit'. The 'Start Visit' button is highlighted with a red box. Below the 'Start Visit' button, there is a button labeled 'Start Group Visit'. Below that, there is a text input field labeled 'Enter Group Visit Code'. At the bottom, there is a button labeled 'Join Group Visit'.

Recap

- ▶ Explained the purpose and basic functionality of Sandata Mobile Connect (SMC)
- ▶ Download, access and log on to SMC
- ▶ Started and completed a scheduled visit
- ▶ Identified the SMC window elements and how to navigate within the SMC App
- ▶ Unscheduled Visits

Questions...





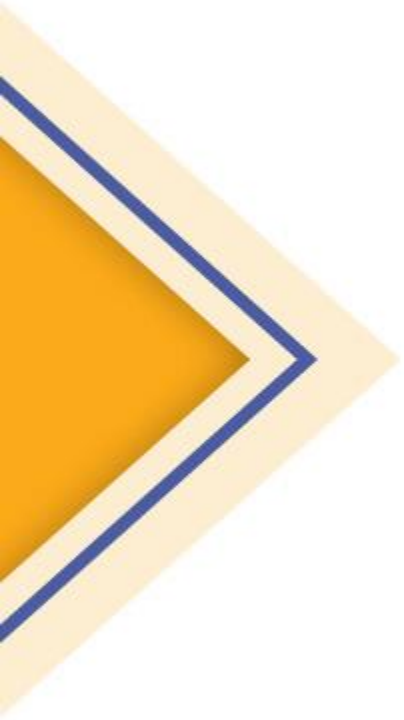
Additional Resources: Sandata on Demand



Feedback

Share your feedback about today's training by taking our quick survey:

<https://www.surveymonkey.com/r/sandatavirtual>



Thank you for your time