



Sandata

Get more right from the start

Nevada DHCFP

Sandata EVV

Visit Capture Caregiver Guide

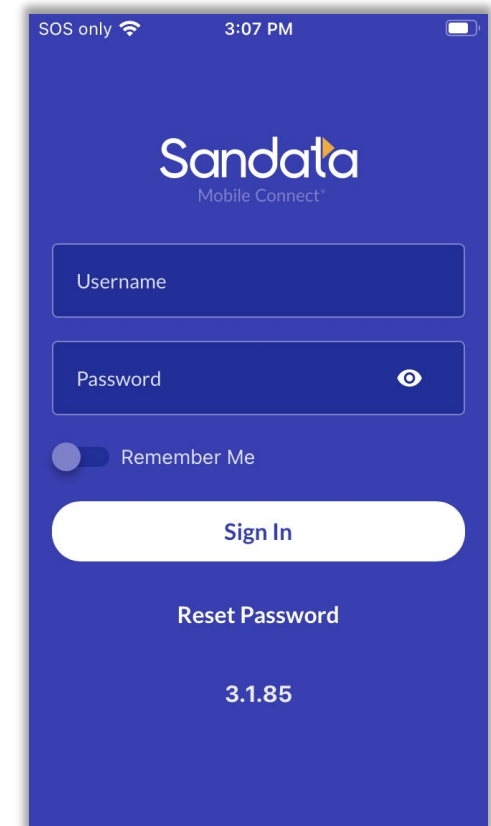
Sandata Mobile Connect (SMC)

Sandata Mobile Connect ® (SMC) is an app that can be used from a cell phone or Wi-Fi-enabled tablet that allows an employee to start and end visits without using the client's 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.



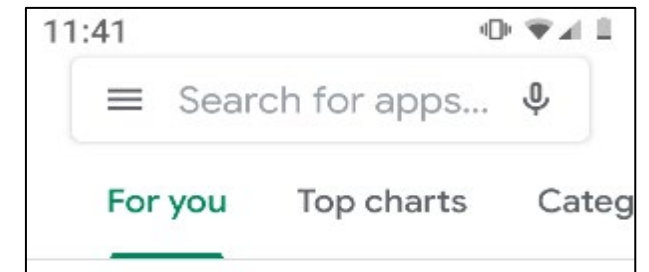
Downloading SMC

Download the app using your preferred app installation service or use the standard device tools.

- ▶ Tap on the **App Store for Apple devices** or the **Play store for Android devices**.

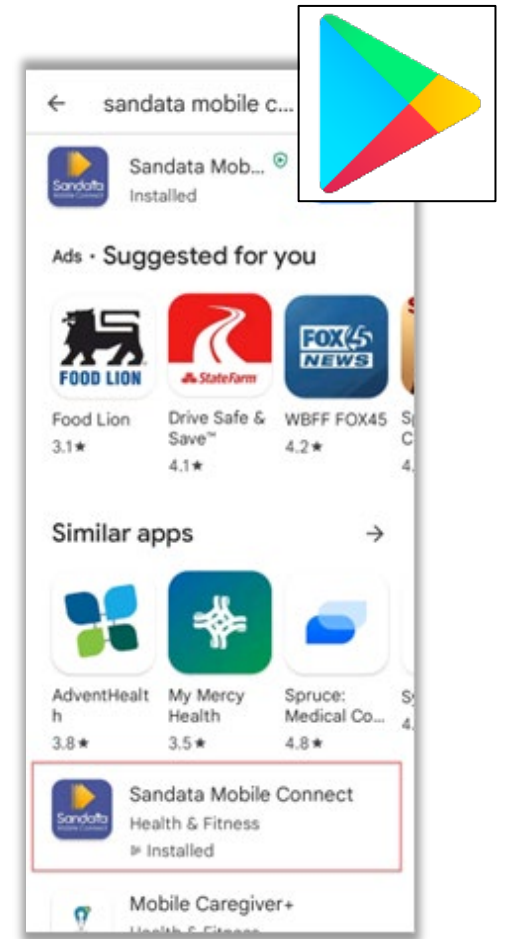
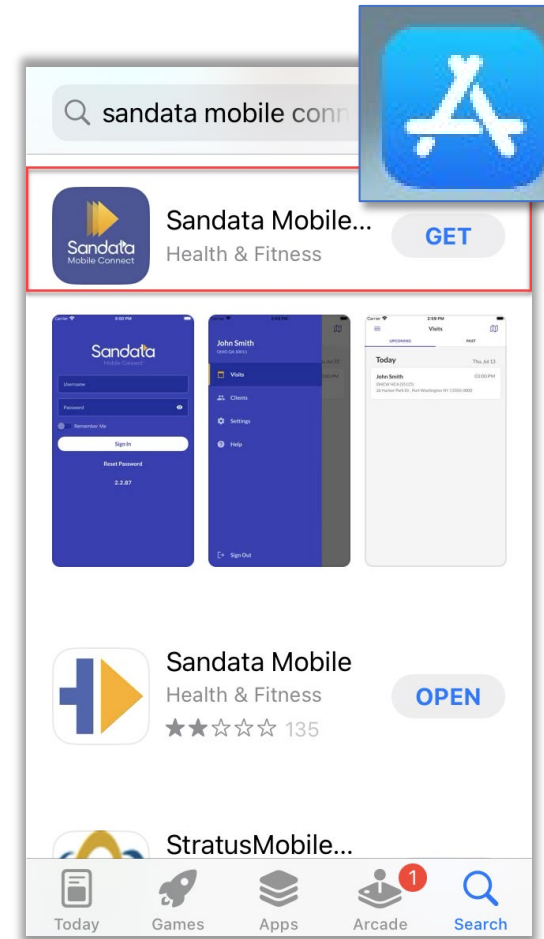


- ▶ Type 'Sandata Mobile Connect' into the search field.



Downloading SMC

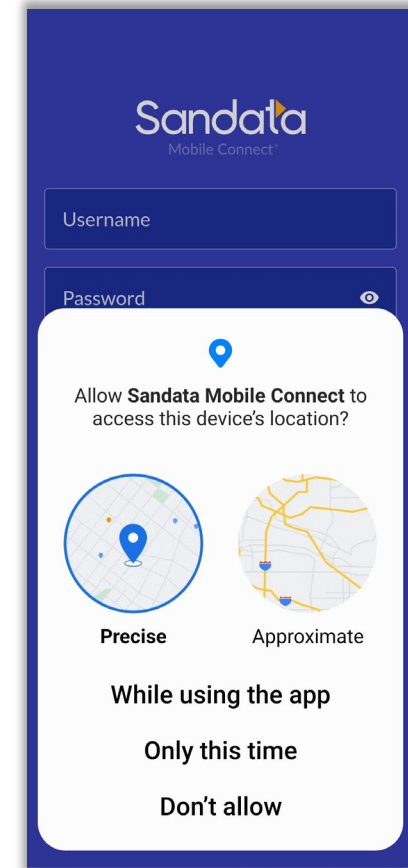
- ▶ The original version and the newest version will be visible (may need to scroll). *Make sure you are choosing the newest version!*
- ▶ Tap the **Sandata Mobile Connect** logo!



Set up and credentialing: Initial set up

When the caregiver launches SMC for the first time, SMC prompts for several permissions.

- ▶ **Location services (GPS) must be enabled.**

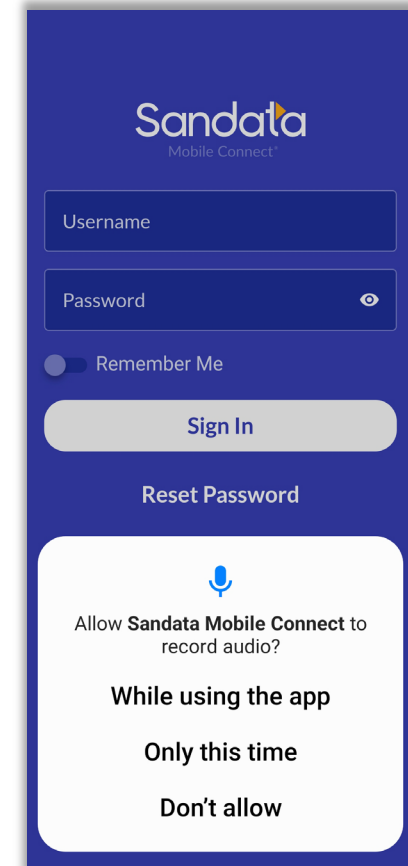


App Permissions

Set up and credentialing: Initial set up

When the caregiver launches SMC for the first time, SMC prompts for several permissions.

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

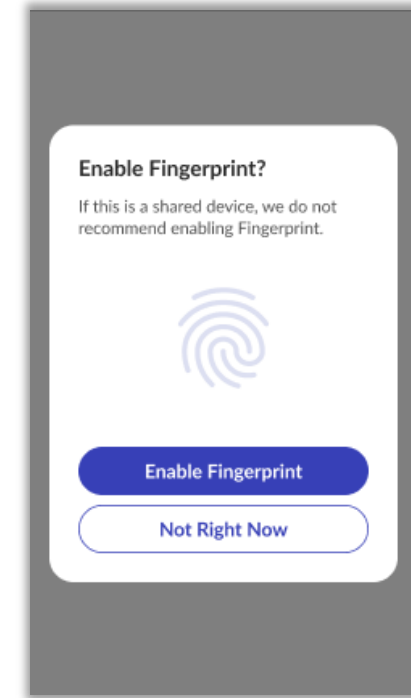


App Permissions

Set up and credentialing: Initial set up

When the caregiver launches SMC for the first time, SMC prompts for several permissions.

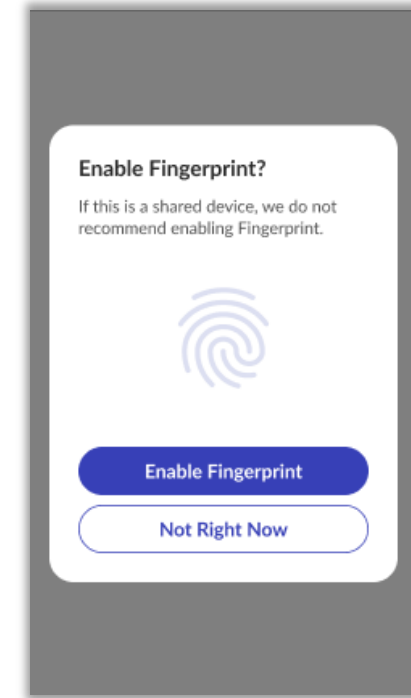
- ▶ Location services (GPS) must be enabled.
- ▶ Agencies configured for client confirmation will need to enable the microphone, if prompted.
- ▶ If the device has **facial or fingerprint recognition settings enabled, SMC will prompt to enable the setting.**
 - This can be toggled in menu options.



App Permissions

Set up and credentialing: Initial set up

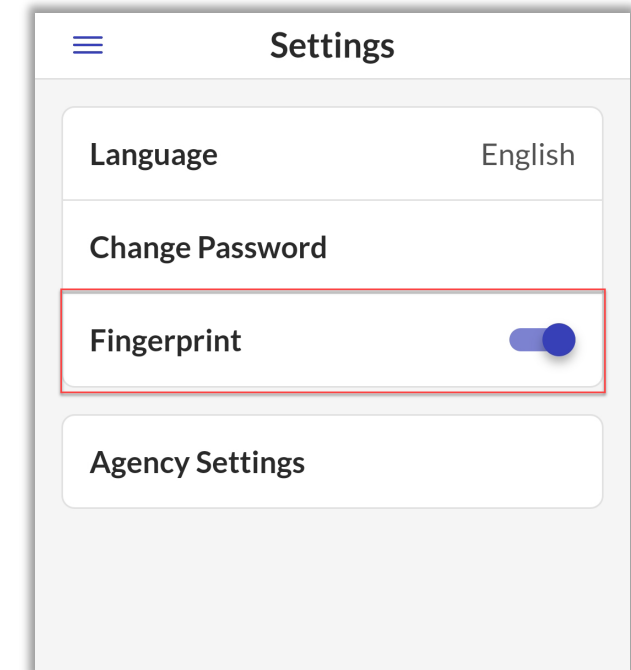
- ▶ The type of setting (face or fingerprint) available will depend on the mobile device used.
- ▶ This **pop up only appears the first-time logging in** to a device with the settings enabled.
- ▶ Tap to enable the feature.



App Permissions

Set up and credentialing: Initial set up

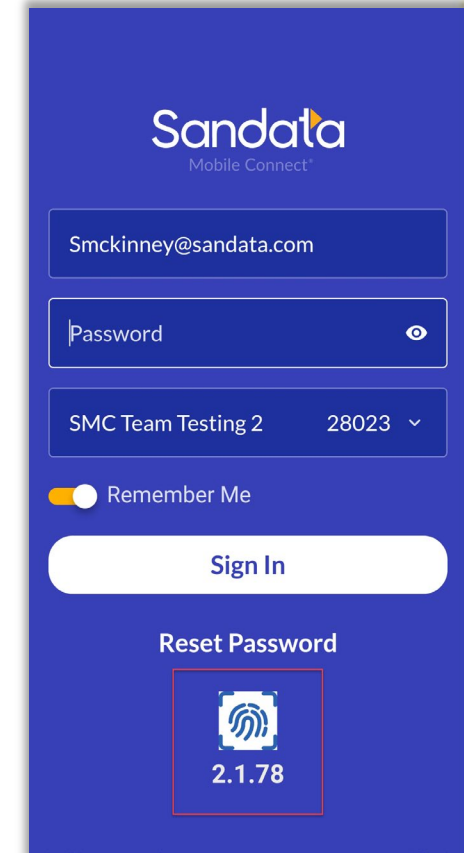
- ▶ After the **fingerprint or face recognition** has been enabled, that setting can be **changed** once the user completes the logon process to SMC.
- ▶ Once logged on, under the menu bar, the **user can select the toggle control** to update this functionality.



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.

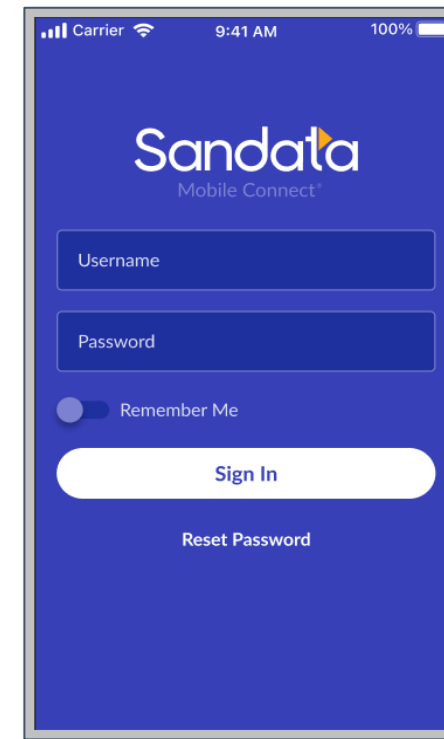


App Permissions

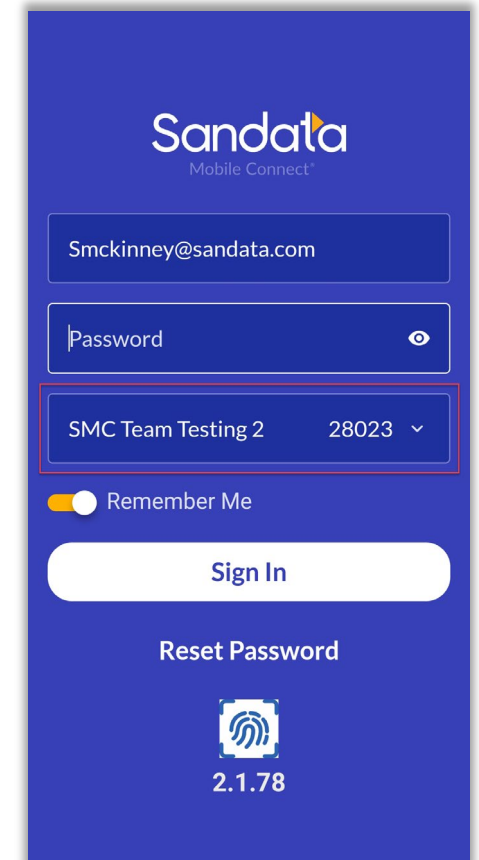
Set up and credentialing: Initial set up

When the employee logs in to SMC for the first time, they 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, similar to the one on the left but with an additional step. Below the password field, there is a red-bordered box containing a drop-down menu. The menu is open, showing 'SMC Team Testing 2' and '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'.

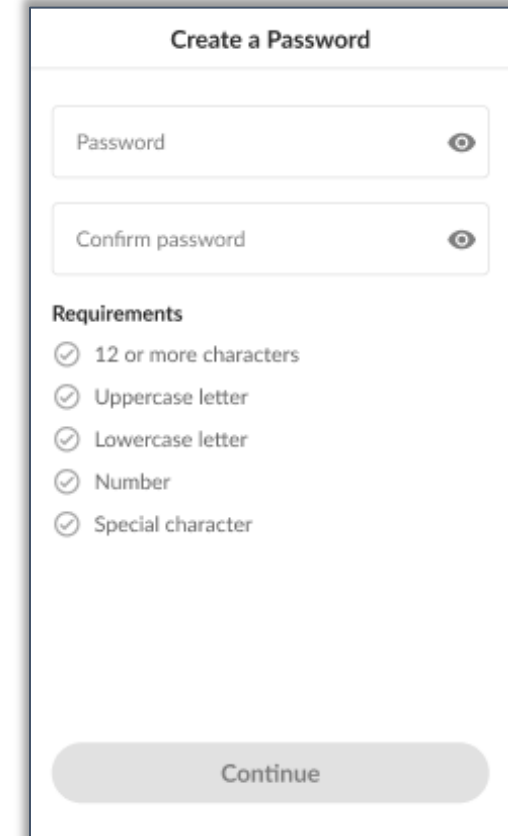
Set up and credentialing: Initial set up

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

The Login screen displays. The new password can now be used to log in.



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 for toggling visibility. Below the fields is a section titled "Requirements" with five checklist items, each preceded by a checkmark: "12 or more characters", "Uppercase letter", "Lowercase letter", "Number", and "Special character". At the bottom of the screen is a grey "Continue" button.



Navigating the Home Screen

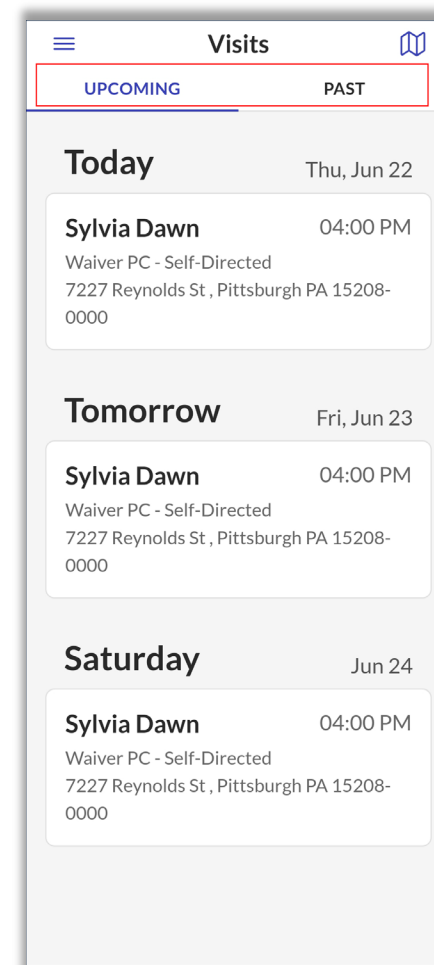


Navigating the Home Screen

After logging in to SMC, the user will be presented with the **Visits** home screen.

From this screen, the Caregiver can select the appropriate tab:

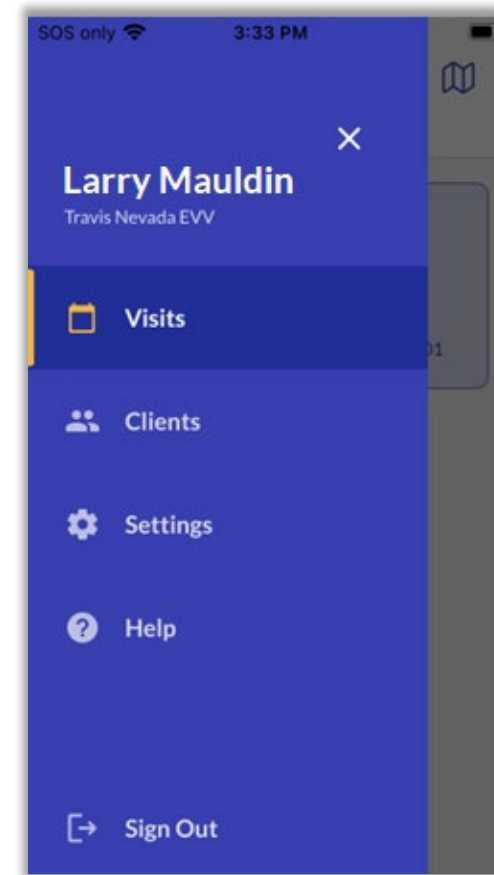
- ▶ View **UPCOMING** schedules – displays visit details that have been assigned to the employee.
- ▶ View **PAST** schedules – displays completed visits that were assigned to the employee.



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**
- ▶ **Sign Out**





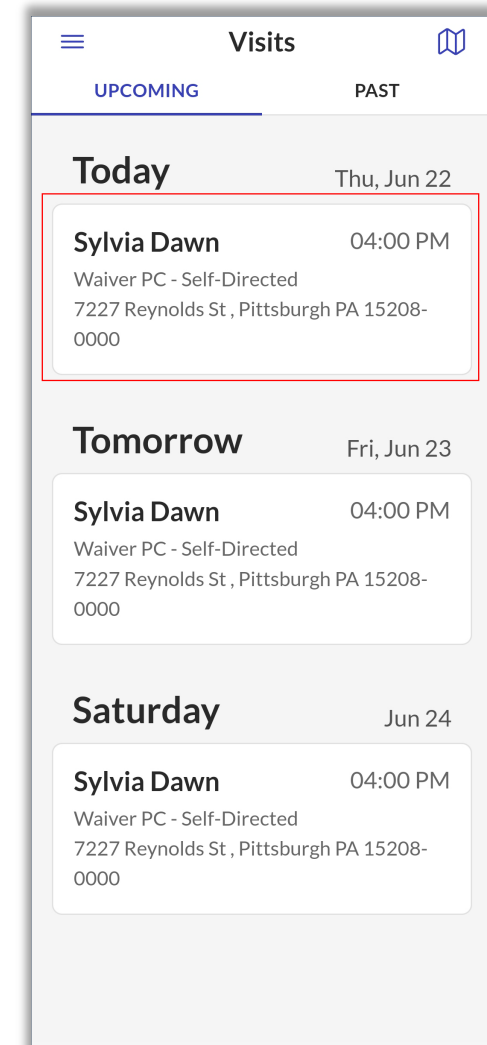
Starting a Visit



Starting a Visit

After arriving at the client's location, the caregiver 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.**

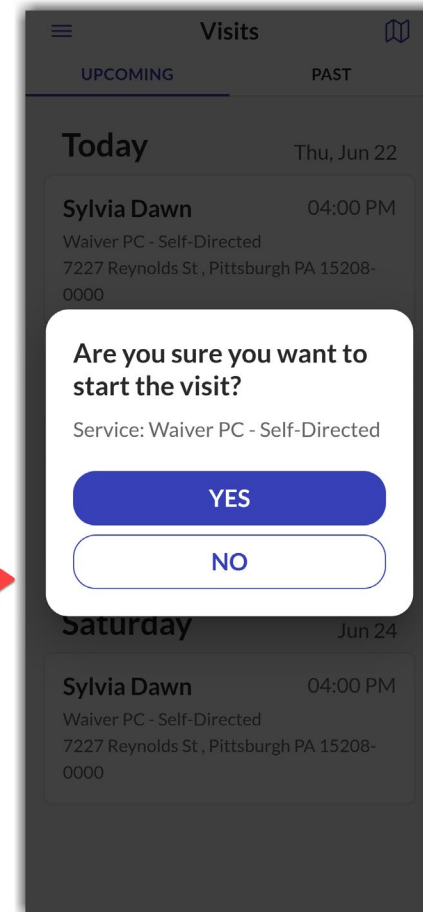
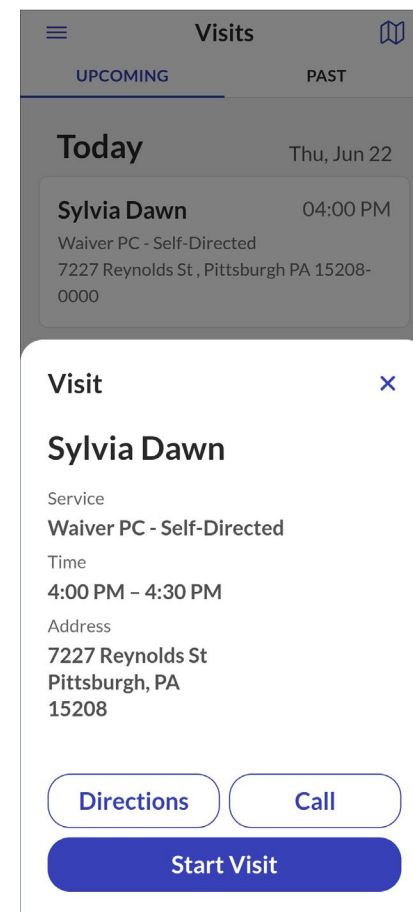


Starting a Visit

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.



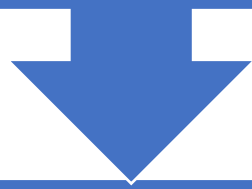


Completing a Visit

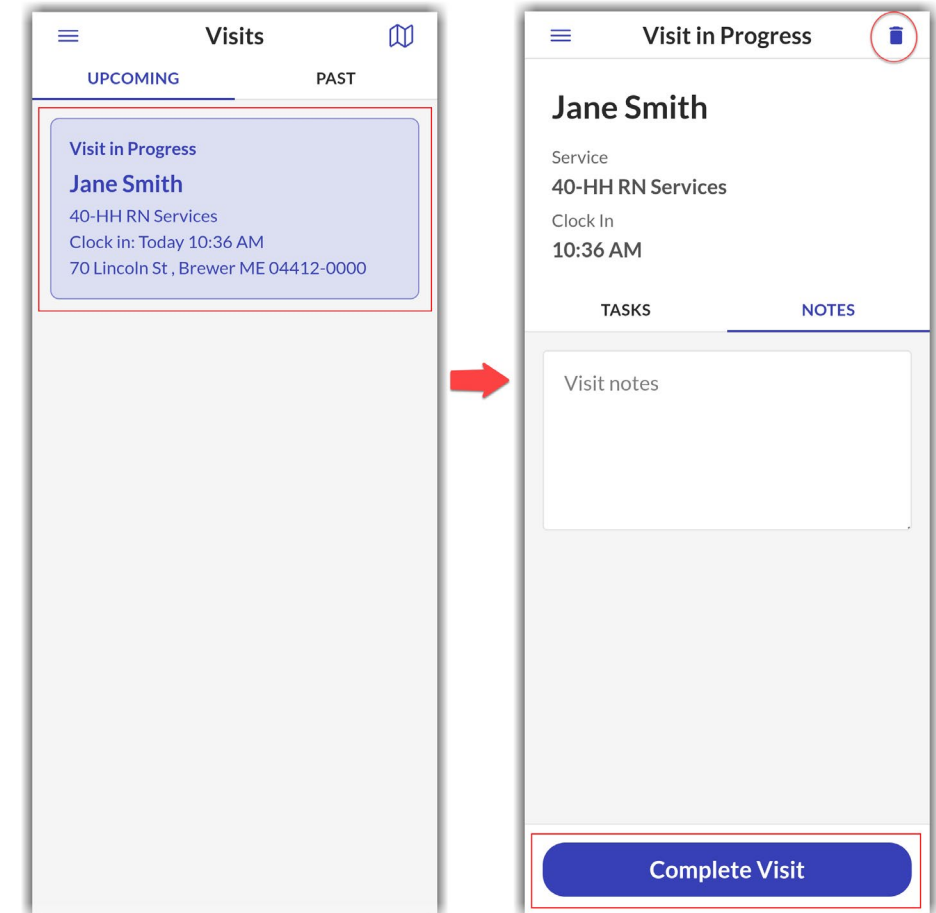


Completing a Visit

Log in to SMC. The Home screen shows the visit is in progress.



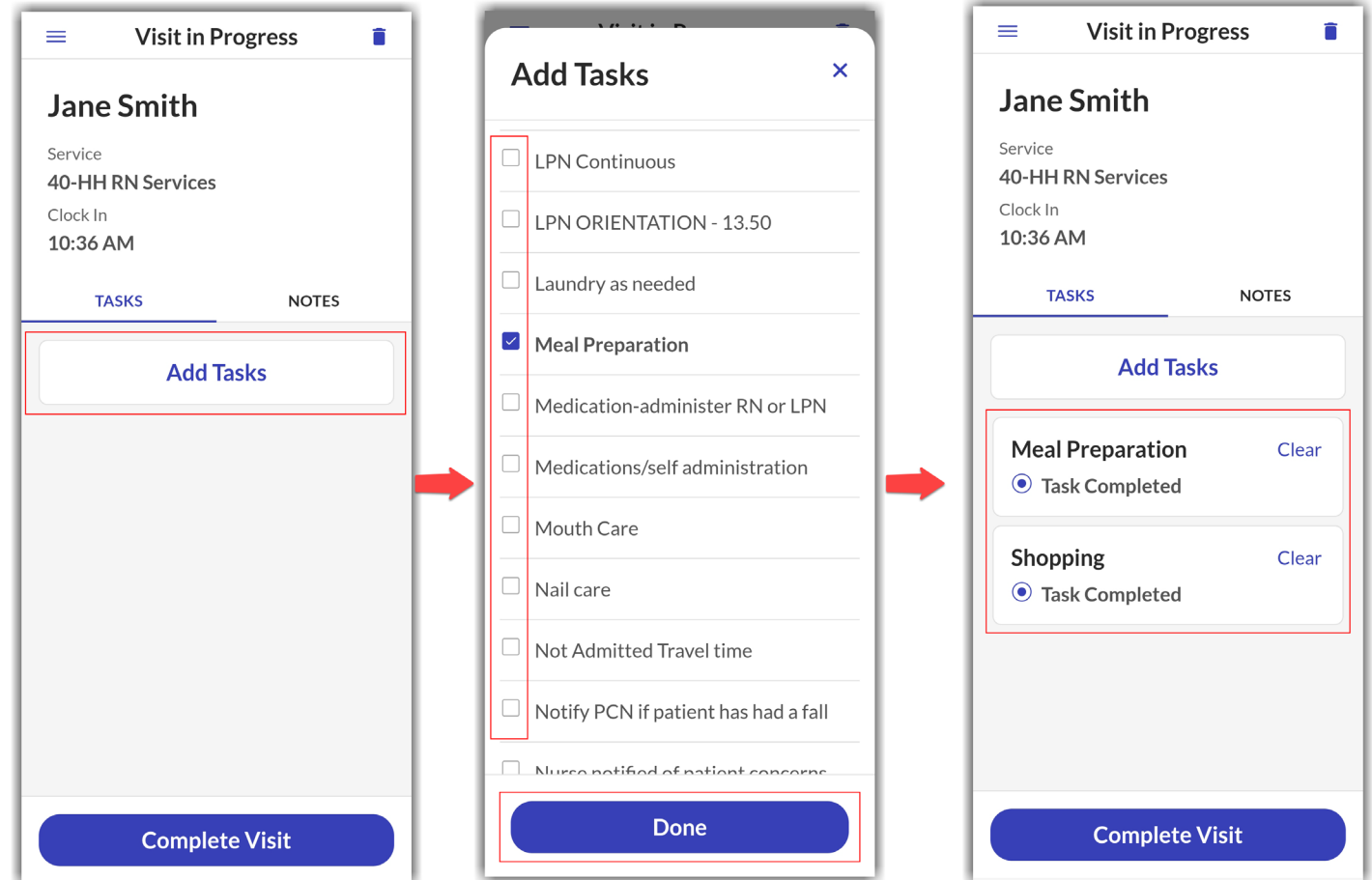
Tap the **Visit in Progress** to resume and complete.



Completing a Visit - Tasks

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

1. Tap **Add Tasks** - the *Add Tasks* menu selection screen displays.
2. Check the appropriate task(s) to add to the visit. Close the add tasks or scroll to the bottom of the list
3. Tap the appropriate option to mark the task complete.





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.



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

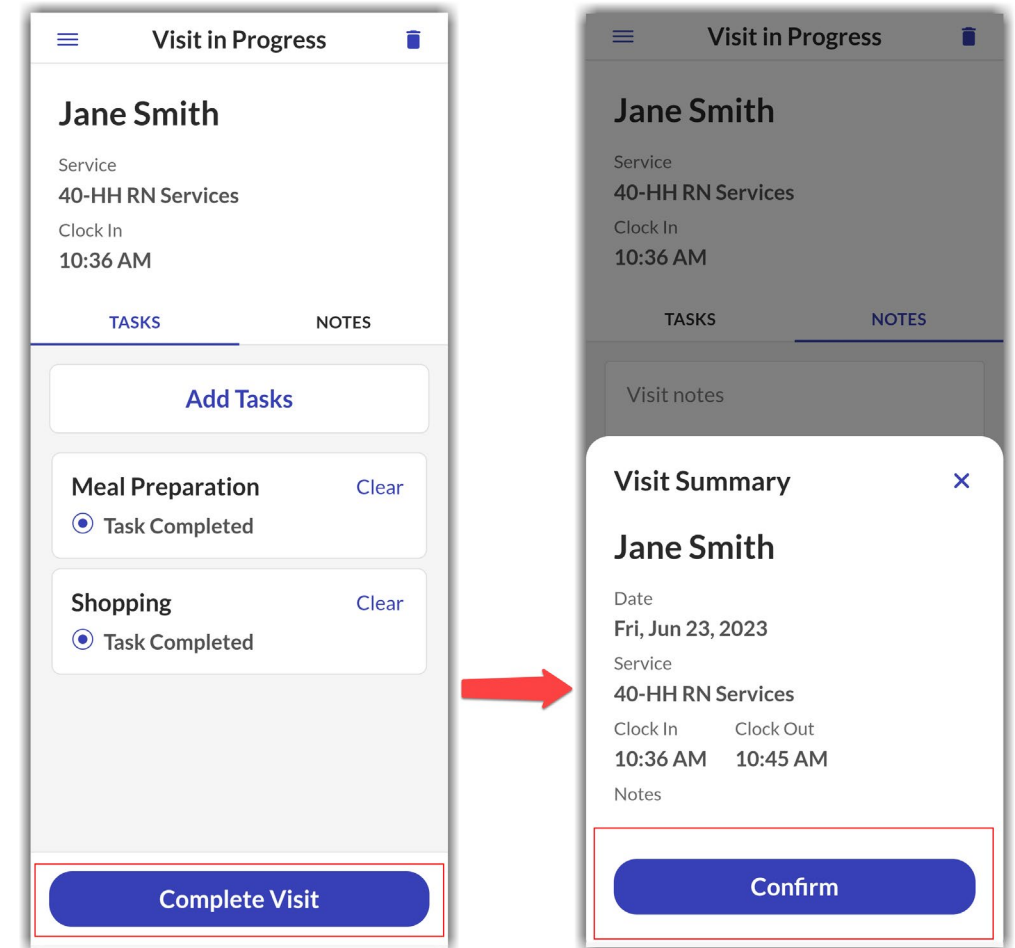
Visit notes

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

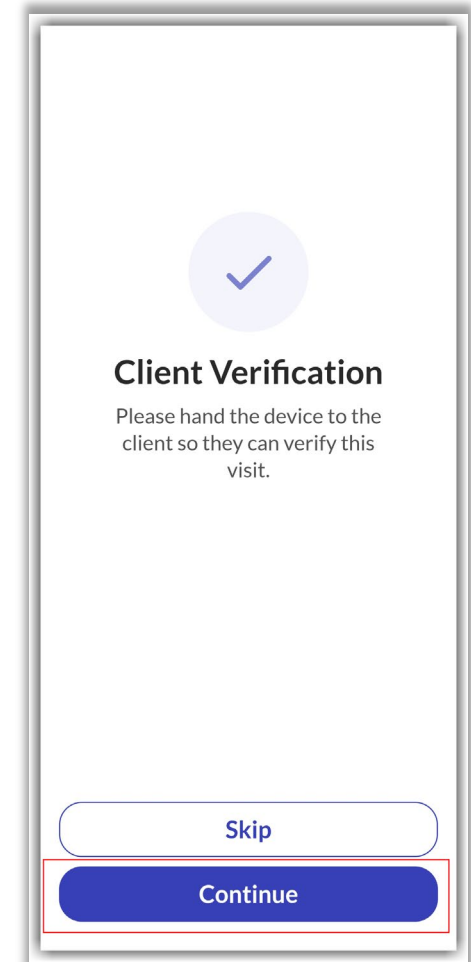


Completing a Visit

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.

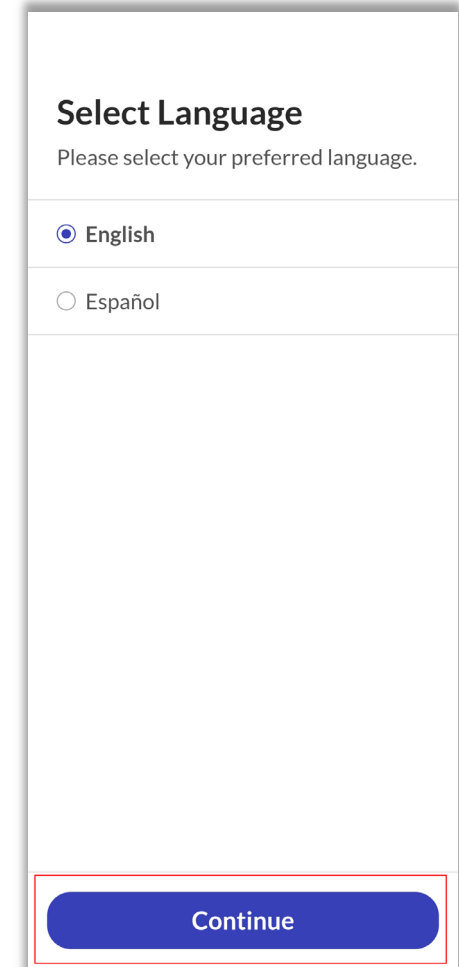


Completing a Visit

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 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.



Completing a Visit

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

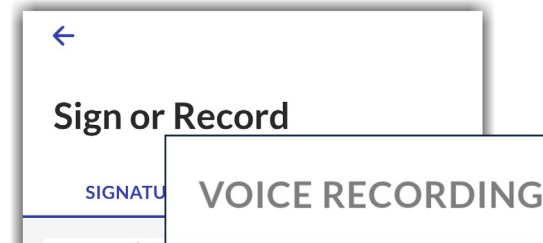


The client cannot bypass the confirmation screen; they must choose **CONFIRM** or **DENY** for each item before the **CONTINUE** button is enabled. If the client taps **DENY** for either item on the visit, an exception is created for the visit *Visit Maintenance*.

A mobile app interface for completing a visit. It features a back arrow at the top left. The main heading is "Hello, Emily" followed by the instruction "Please verify the details for today's visit." Below this, there are two sections: "Services" and "Visit Time". Each section contains a card with details and two buttons: "Confirm" and "Deny". The "Services" card shows "20-Personal Care Srvs" and "1 hour, 28 minutes". The "Visit Time" card shows "01:54 PM - 03:23 PM" and "1 hour, 28 minutes". At the bottom of the screen, 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.

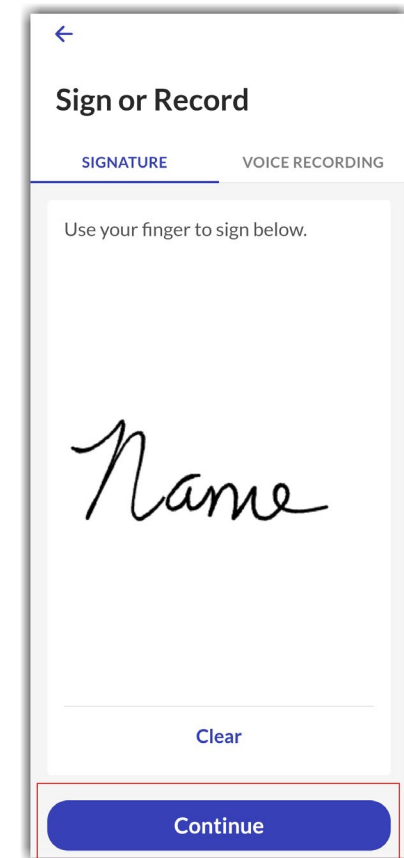


The system will only allow one form of confirmation. If you complete the signature and the voice recording, you will be prompted to select which confirmation format to submit.

Completing a Visit – Signature

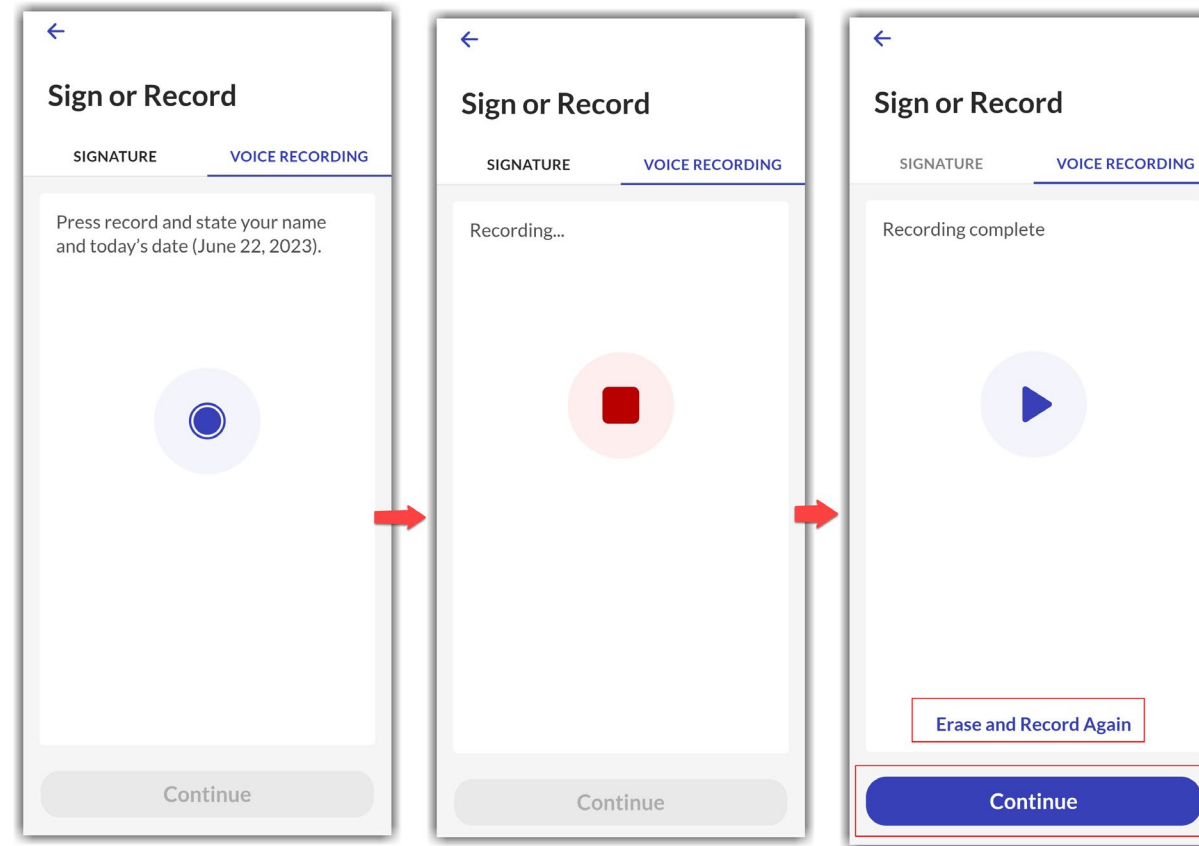
Visit confirmations can be completed with the client's signature.

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.

A mobile app interface for signing a visit confirmation. At the top, there is a back arrow and the title "Sign or Record". Below the title are two tabs: "SIGNATURE" (which is selected and underlined) and "VOICE RECORDING". The main area contains the instruction "Use your finger to sign below." and a large white box where a signature "Name" has been written in black ink. Below the signature box is a "Clear" button. At the bottom of the screen is a large blue "Continue" button with a red border.

Completing a Visit – Voice Recording

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

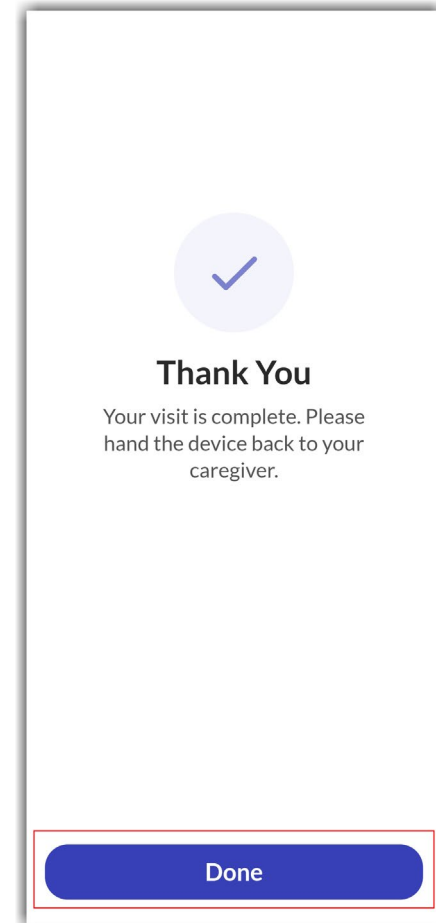


Completing a Visit

- ▶ 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.





Telephone Visit Verification ("TVV")



Call Reference Guide (CRG): calling instructions

Sandata Telephone Visit Verification (TVV) Toolkit

Allied Alabama Department of Mental Health



Provider Account Number: 400502

Santrax ID:

Client ID:

LANGUAGE	DIAL
English	877-634-2072

Call Out Instructions

Before you leave your client's home, you will need your Santrax ID to call out. You will also need the service ID and task ID for the activities performed during the visit.



8. Dial any of the toll-free numbers listed.

The Santrax system will say: "For English, please press one (1). For Spanish, please press two (2)."

Call prompts are heard in the selected languages.



9. Press the number that corresponds with the language you wish to hear.

Santrax will say: "Welcome, please enter your Santrax ID."



10. Press the numbers of your Santrax ID on the touch tone phone.

Santrax will say: "Please choose your location of service. Press (1) one for Home, Press (2) for Community, Press (3) for replay."



11. Press (1) to select home or (2) to select community.

Santrax will say: "If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."

If this is an FVV Call, press the star (*) key and refer to the FVV Call Reference Guide for detailed instructions for the FVV call process. If this is not an FVV call, press pound (#) and continue.

Call Reference Guide (CRG): calling instructions

Note: The specific steps of the CRG will vary based on your system configuration.

Sandata Telephone Visit Verification (TVV) Toolkit



Allied Alabama Department of Mental Health

Provider Account Number: 400502

Santrax ID:

Client ID:

LANGUAGE	DIAL
English	877-634-2072

Call In Instructions

When you arrive at your client's home, you will need your Santrax ID to call in. You must call in using a touch-tone phone.



1. Dial any of the toll-free numbers listed. If you have trouble with the first number, try the second number.

The Santrax system will say: "For English, please press one (1). For Spanish, please press two (2)."

Call prompts are heard in the selected languages.



2. Press the number that corresponds with the language you wish to hear. Santrax will say: "Welcome, please enter your Santrax ID."



3. Press the number of your Santrax ID. Santrax will say: "Please choose your location of service. Press (1) one for Home, Press (2) for Community, Press (3) for replay."



4. Press (1) to select home or (2) to select community. Santrax will say: "If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue." If this is an FVV Call, press the star (*) key and refer to the FVV Call Reference Guide for detailed instructions for the FVV call process. If this is not an FVV call, press pound (#) and continue.

Call Reference Guide: task list






- In addition to the Call Reference Guide, a provider agency may also receive a Tasks and Services list (*based on system configuration*).
- These codes should be entered during the call-out call process.
- Each item has a unique ID for entry on the call when prompted.

Sandata

Sandata Telephone Visit Verification (TVV) Toolkit

Allied Alabama Department of Mental Health

TASK ID	DESCRIPTION	TASK ID	DESCRIPTION
145	Other Skilled Needs	223	Prescribed Diet Assist
160	Administer Medications and Treatments Prescribed by A Licensed or Otherwise Legally Authorized Physician or Dentist	224	Grocery Shopping
161	Provide Education and Training Designed to Maintain Access to An Appropriate Level of Health Care.	225	Pick Up Medications
162	Administer Skilled Services as Ordered by The Physician.	226	Remind To Take Meds
163	Evaluate Effectiveness of Nursing Services and Report Changes in Client's Condition as Warranted.	227	Pay Bills
164	Provide Skilled Medical Observation, Monitor Client's Physical, Mental, Or Emotional Conditions and Report Any Changes.	228	Phone-Assist with Use
165	Orient The Client to Daily Events	229	Letters - Read/Write/Mail
166	Observe Home Safety to Include Home's Surroundings and Report Concerns to Case Manager.	230	Observe/Report to Client
167	Accompany Client to Medical Appointments, If Necessary.	231	Ensure Home Safety
168	In Emergency, Accompany Client to ER via Ambulance	235	Bathe/Groom/Hygiene
176	Suction	236	Skin/Hair/Oral
179	Other	237	Nail Care
189	Essential Shopping	238	Shave
190	Transportation To and From Work	239	Dress Client
192	Toileting	240	Bowel/Bladder
193	Medication Monitoring	241	Turn Client
194	Entering Or Exiting Doors	244	Meal/Snack Preparation
211	Make Bed/Change Linen	245	Feed Client
212	Dust/Sweep/Vacuum	246	Housekeeping Light
213	Clean/Detross Refrigerator	247	Laundry Light
214	Clean Stove/Oven	248	Transfer Bed/Chair
215	Flamm Mon.	249	Ambulation-Assist

Sandata Telephone Visit Verification (TVV) Toolkit		Sandata			
Allied Alabama Department of Mental Health					
 19. Press the Task Number you performed. Santrax will say: "Task Description. You entered (NUMBER) task(s). To record the client's voice please press one (1) and hand the phone to the client or press two (2) if the client is unable to participate."					
To continue with a new service <ul style="list-style-type: none">• Repeat Step 15 and Step 16 for the new service.• Continue to Step 17. NOTE: Information entered in Steps 15 to 20 is for the service that was already performed.		For the final service <ul style="list-style-type: none">• Continue to step 20 to complete the visit for the service performed.			
 20. Press one (1) to record the client's voice OR press two (2) if the client is unable to participate. Hand the phone to the client. They will be asked to state their name and today's date. Santrax will say: "Please say your first and last name and today's date."					
 21. The client should say their first and last name and today's date. Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press one (1) to confirm, two (2) to deny, three (3) to replay."					
 22. The client should press the appropriate option. Santrax will say: "The service performed was (SERVICE). Press one (1) to confirm, two (2) to deny, three (3) to replay." NOTE: This prompt will be repeated for each service entered.					
 23. The client should press the appropriate option. Santrax will say: "Thank you, bye."					