Sandata

New Feature Demo

August 22, 2024

Sharlyn Katzner

- I/DD Specialist/Tooling Product Owner
- Joined Solana in 2005
- Live in Northwest Ohio
- Mother of Two Daughters (22 and 17)
- Love Dogs, Ice Cream, and Mani/Pedis
- Voting Rights Advocate

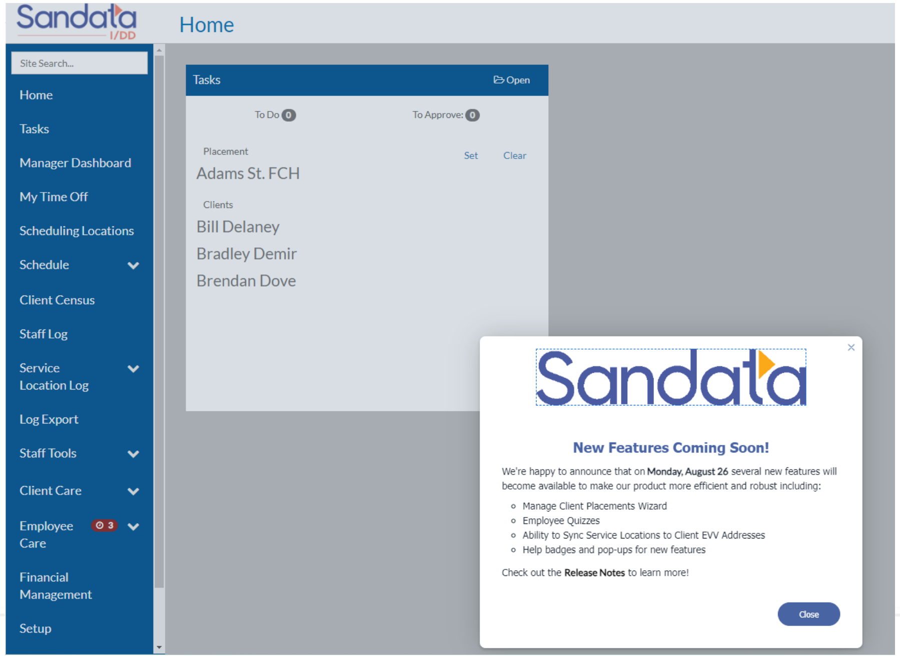
Agenda

- Help in DataPlus
- Employee Add Wizard
- Client Add Wizard
- Manage Placements Wizard
- Service Plans
- Quizzes
- Adding Notes to Time Tracking Log Entry
- Client Log Transactions Grid
- Next Webinar

Help in DataPlus

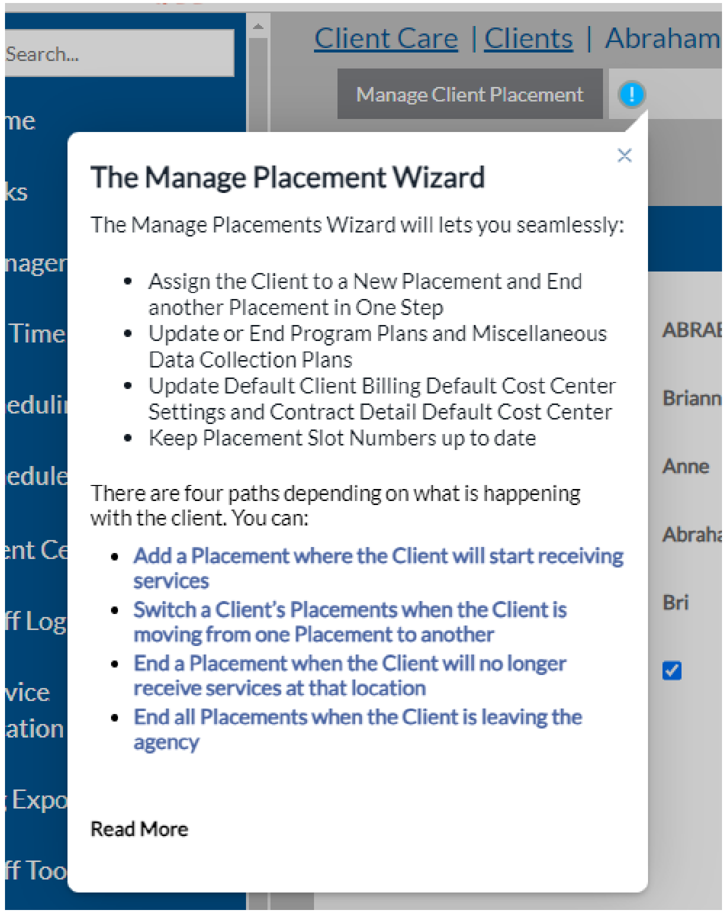
New Release Announcements

- You will see a one-time announcement when you log in about upcoming new features
- Clicking Read More will take you to the release notes which will give information on how to get the new feature.
- Links in the release notes give you details on how to use the new feature.



Help Badges

- Help badges appear on new features
- Click the badge to view a quick overview of the feature.
- Click the Read More link to open the help topic to learn how to use the feature.



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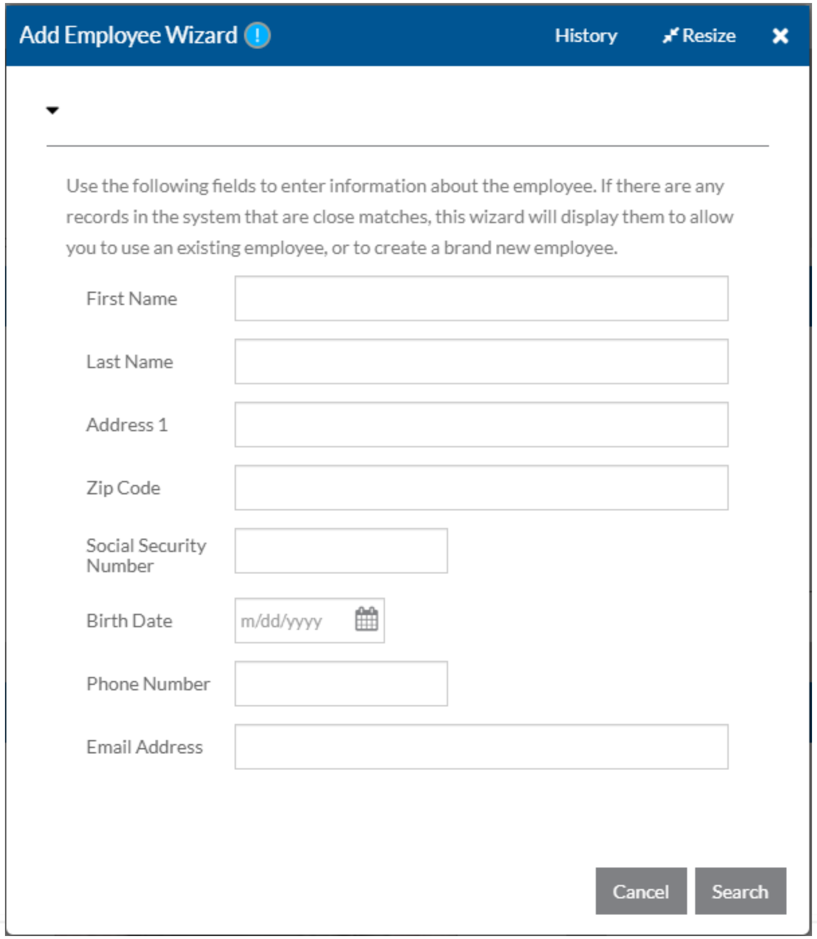
Employee Add Wizard

Employee Add Wizard

The Add Employee wizard guides you through adding an employee.

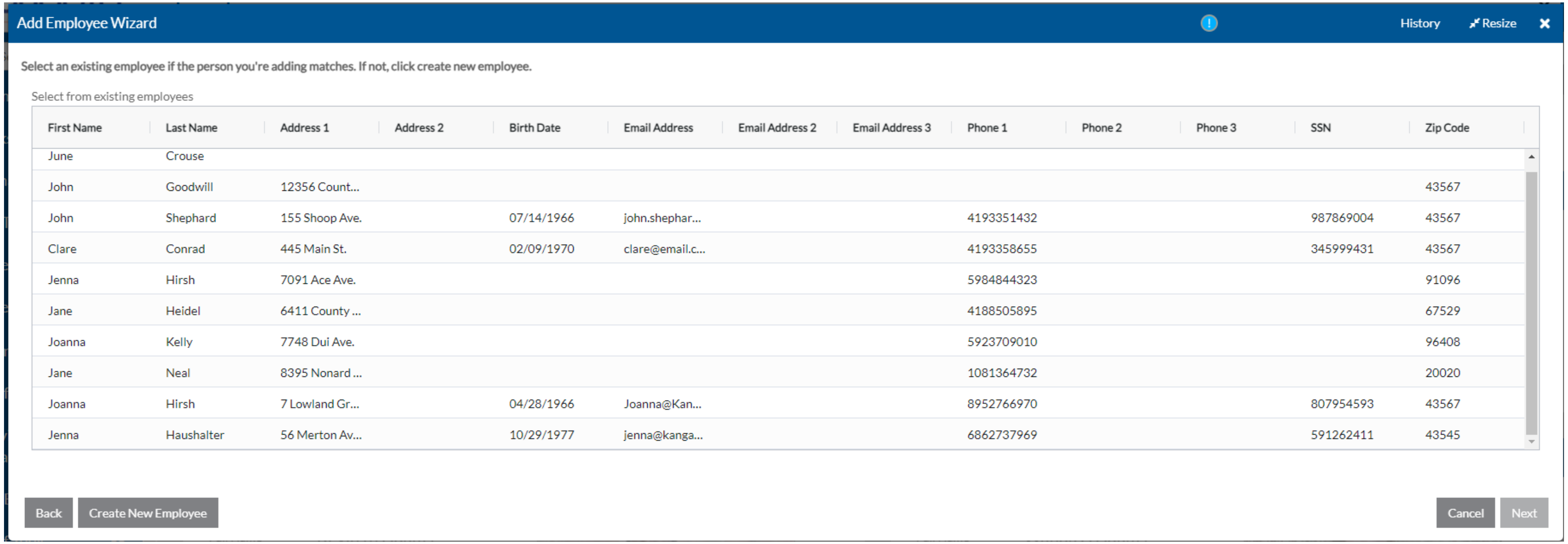
- Complete the information on the first screen
- Click Search

(Don't worry this information won't be lost!)



Employee Add Wizard

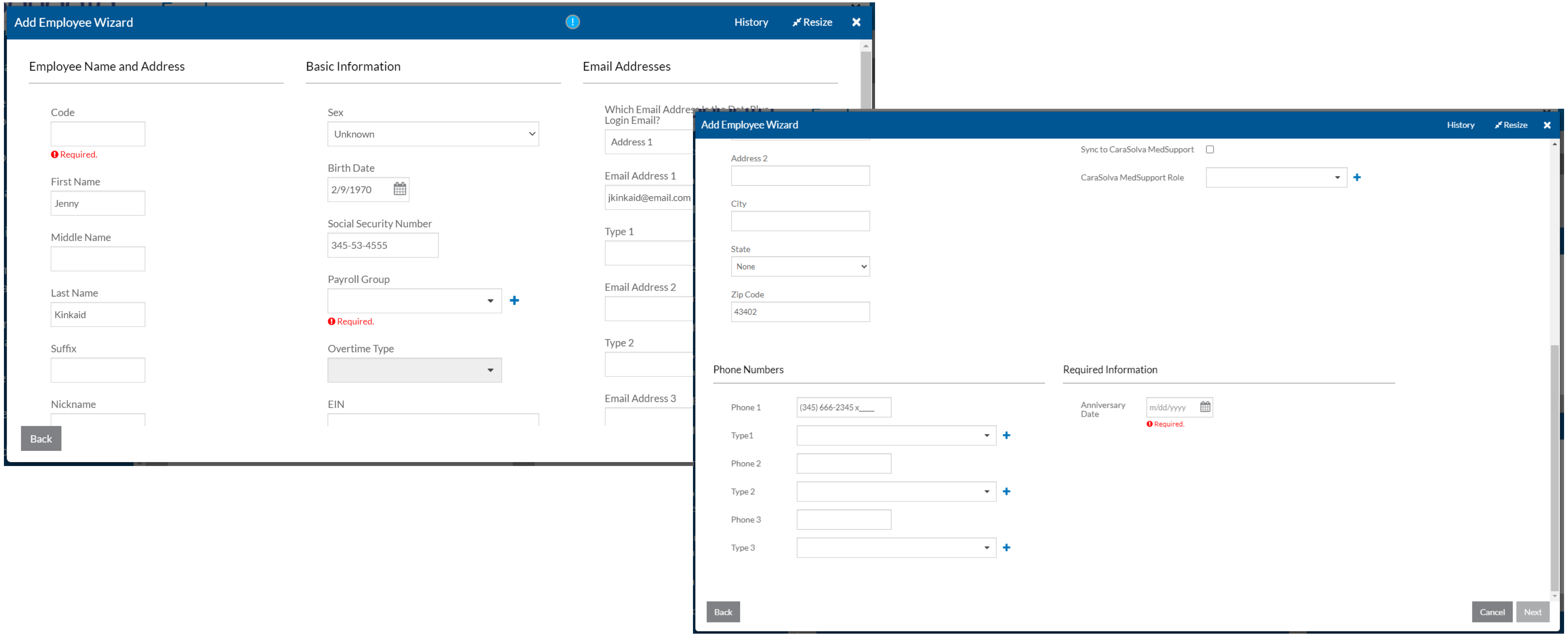
The Employee Add wizard ensures that you do not add the same employee more than once.



First Name	Last Name	Address 1	Address 2	Birth Date	Email Address	Email Address 2	Email Address 3	Phone 1	Phone 2	Phone 3	SSN	Zip Code
June	Crouse											
John	Goodwill	12356 Count...										43567
John	Shephard	155 Shoop Ave.		07/14/1966	john.shephar...			4193351432			987869004	43567
Clare	Conrad	445 Main St.		02/09/1970	clare@email.c...			4193358655			345999431	43567
Jenna	Hirsh	7091 Ace Ave.						5984844323				91096
Jane	Heidel	6411 County ...						4188505895				67529
Joanna	Kelly	7748 Dui Ave.						5923709010				96408
Jane	Neal	8395 Nonard ...						1081364732				20020
Joanna	Hirsh	7 Lowland Gr...		04/28/1966	Joanna@Kan...			8952766970			807954593	43567
Jenna	Haushalter	56 Merton Av...		10/29/1977	jenna@kanga...			6862737969			591262411	43545

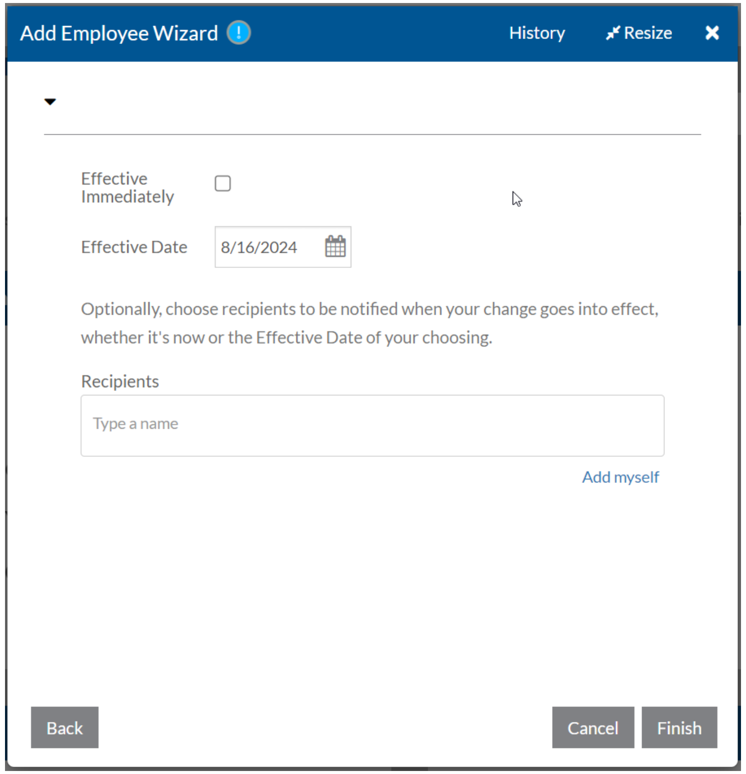
Employee Add Wizard

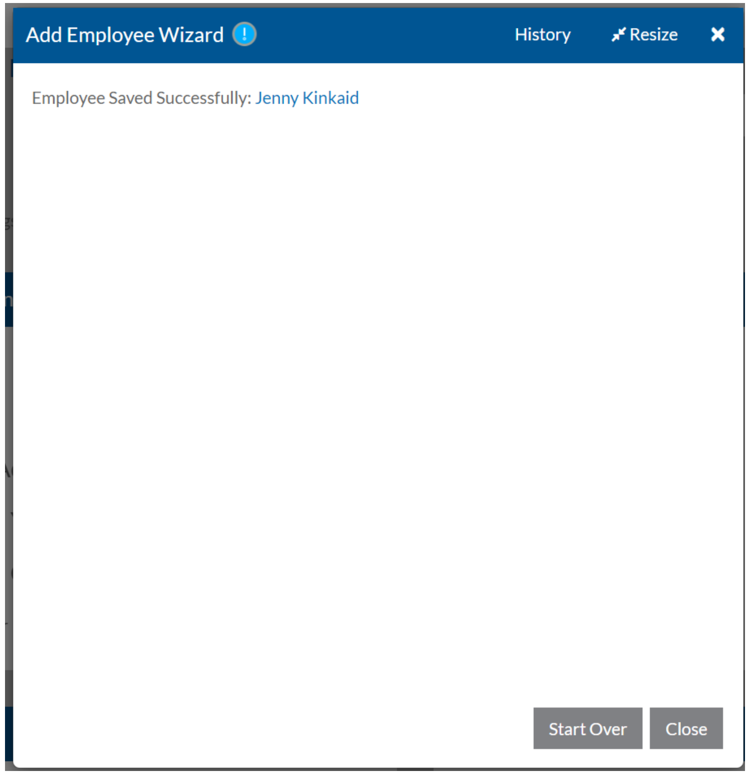
Continue entering the basic and *required* information (including any custom required information!)



Employee Add Wizard

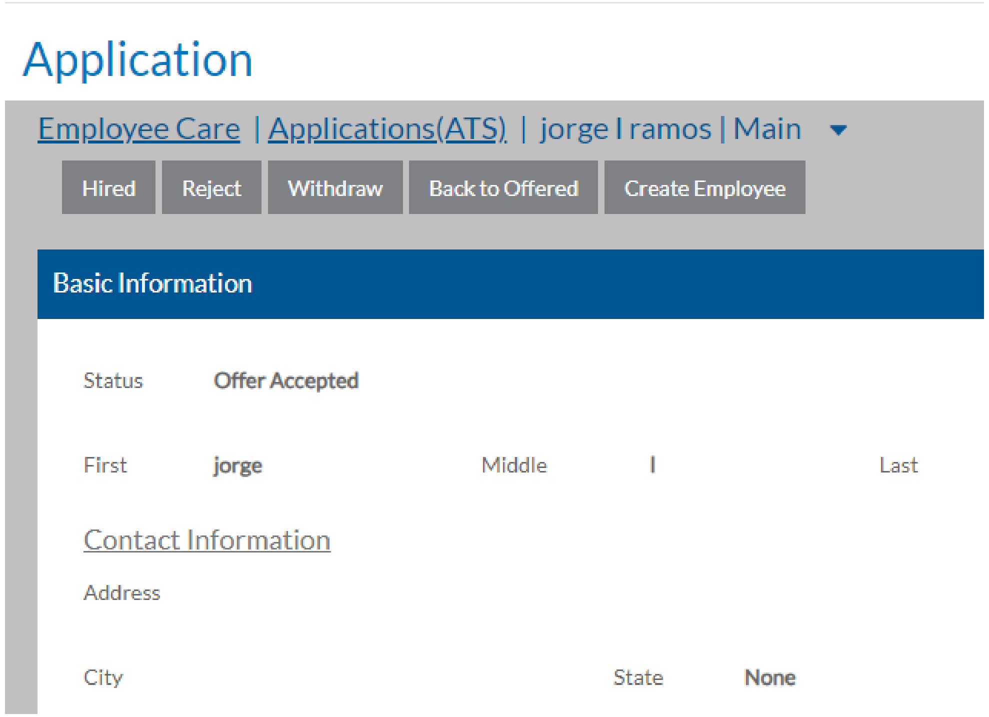
In addition, you can schedule the new employee to be added at a future date as well as designate who is notified that a new employee was added.





Employee Add Wizard

Can also launch the wizard from the Application from the Create Employee button (new Application Tracking)



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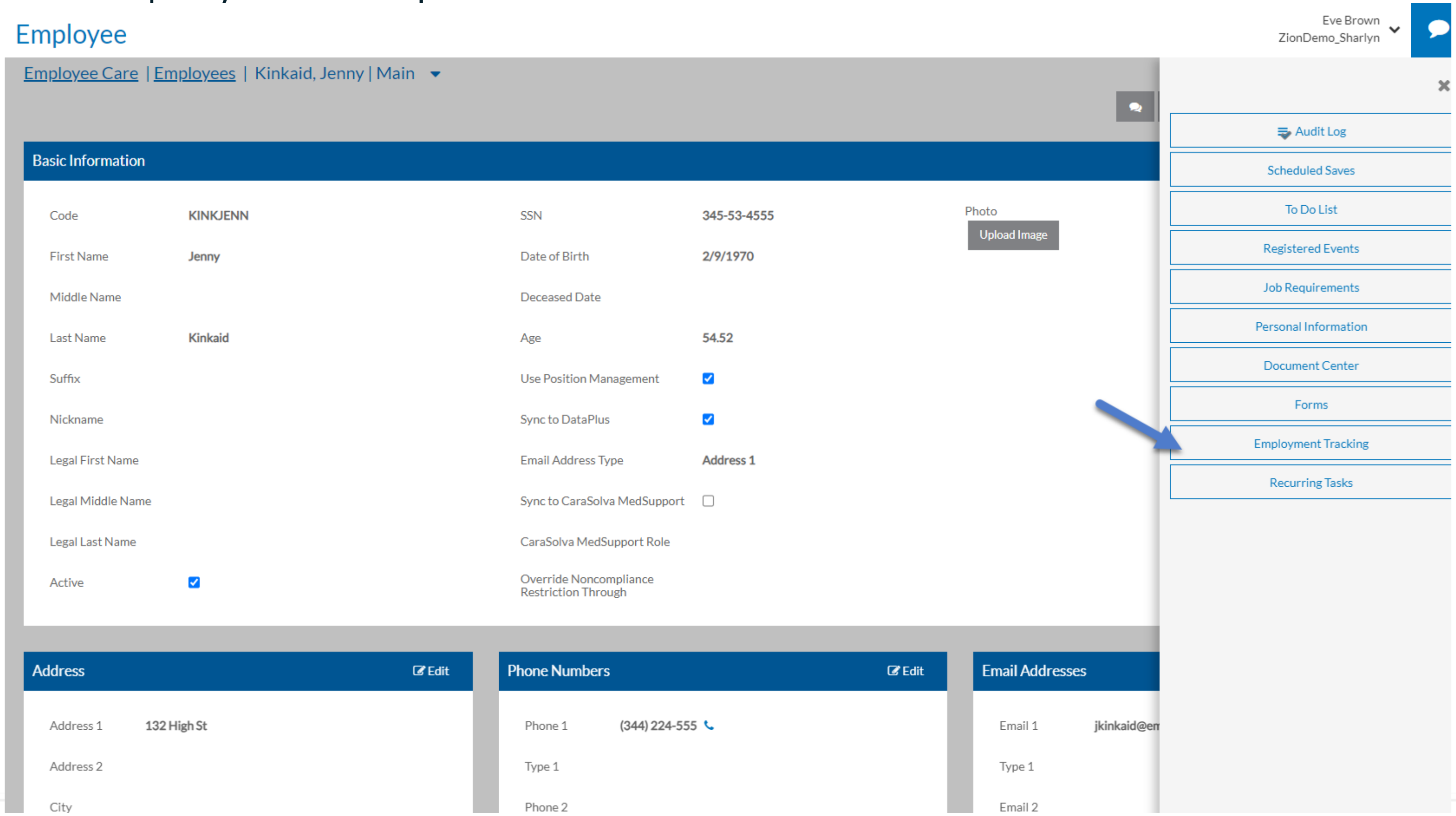
Employee Add Wizard

After adding the employee run the Employment Tracking Wizard or assign a Position or Employee Group



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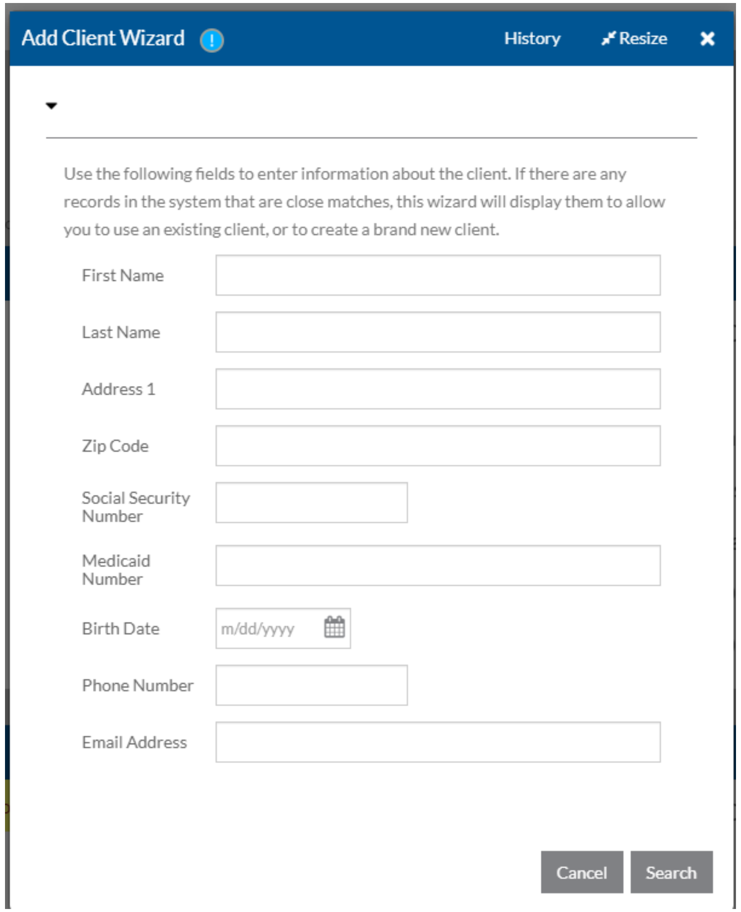
Client Add Wizard

Client Add Wizard

The Add Client wizard guides you through adding a client.

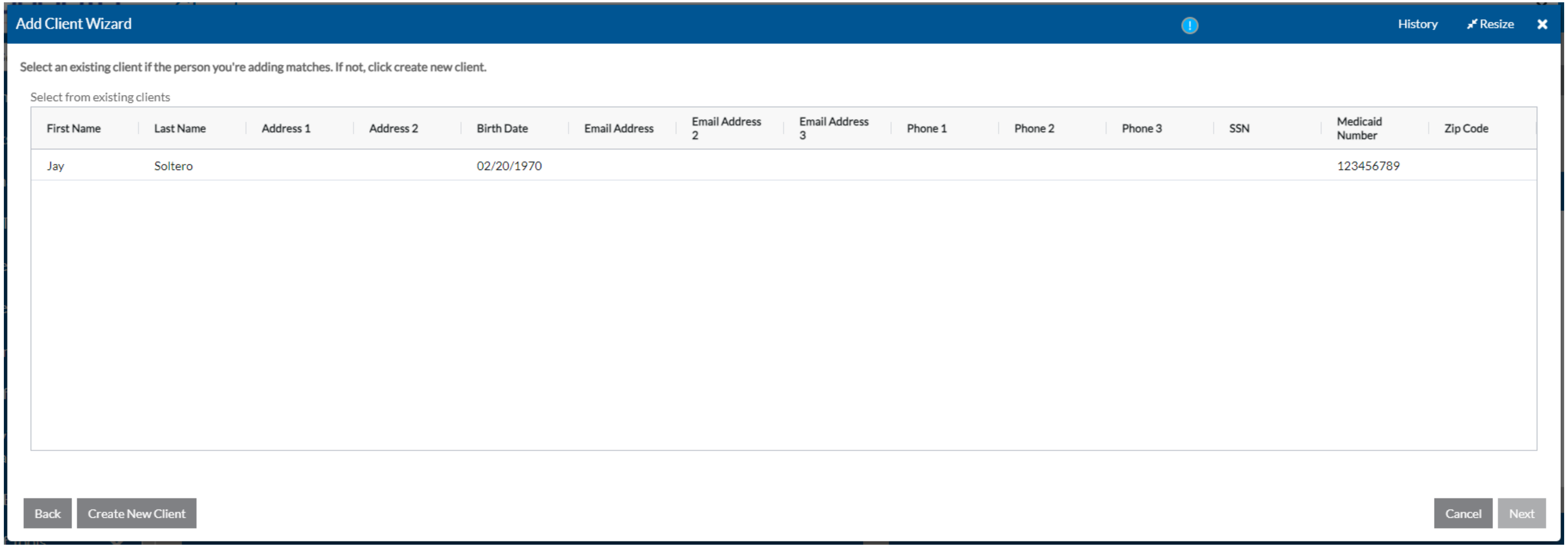
- Complete the information on the first screen
- Click Search

(Again, don't worry this information won't be lost!)



Client Add Wizard

The Client Add wizard ensures that you do not add the same client more than once.



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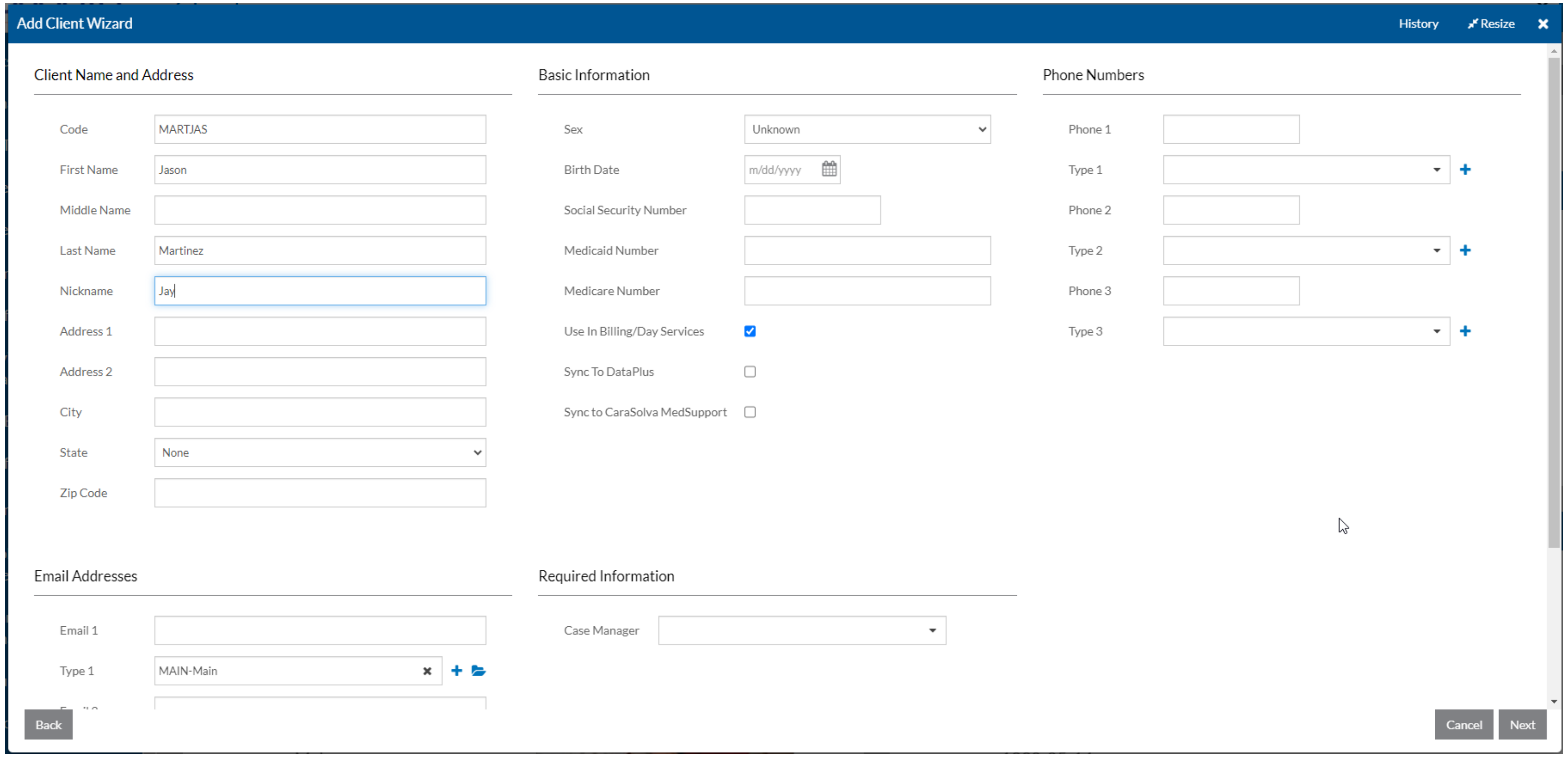
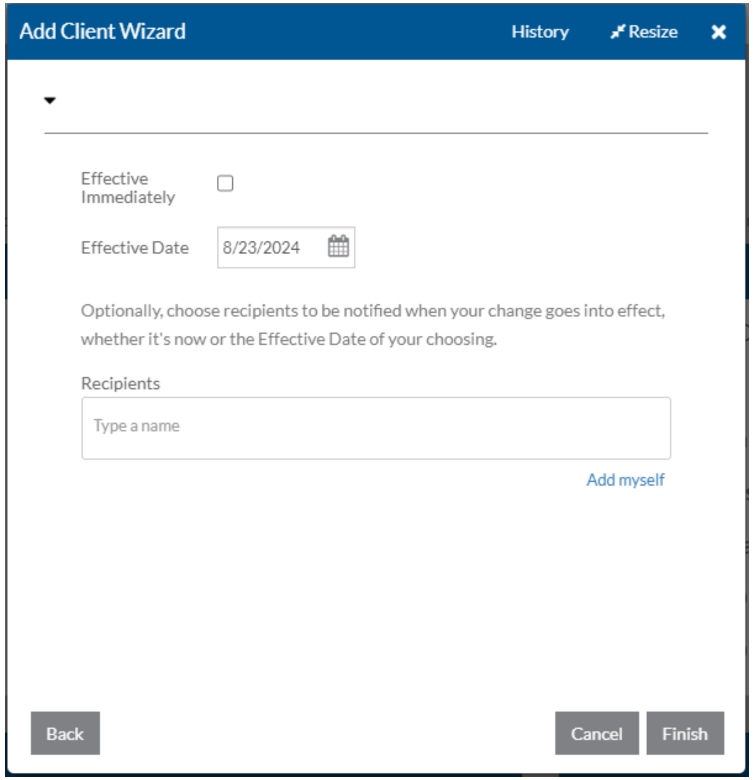
Client Add Wizard

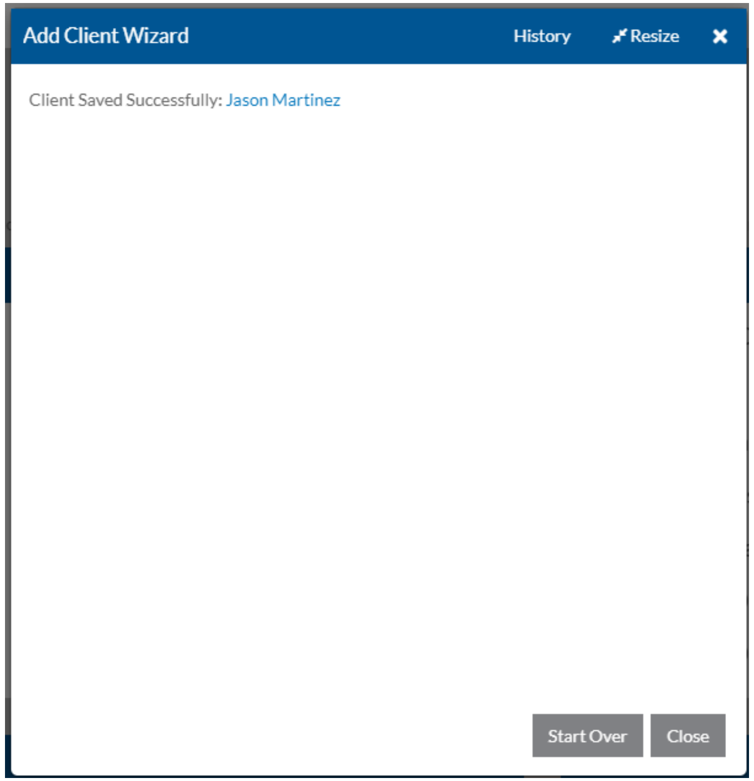
Continue entering the basic and *required* information (including any custom required information!)



Client Add Wizard

In addition, you can schedule the new client to be added at a future date as well as designate who is notified that a new client was added.



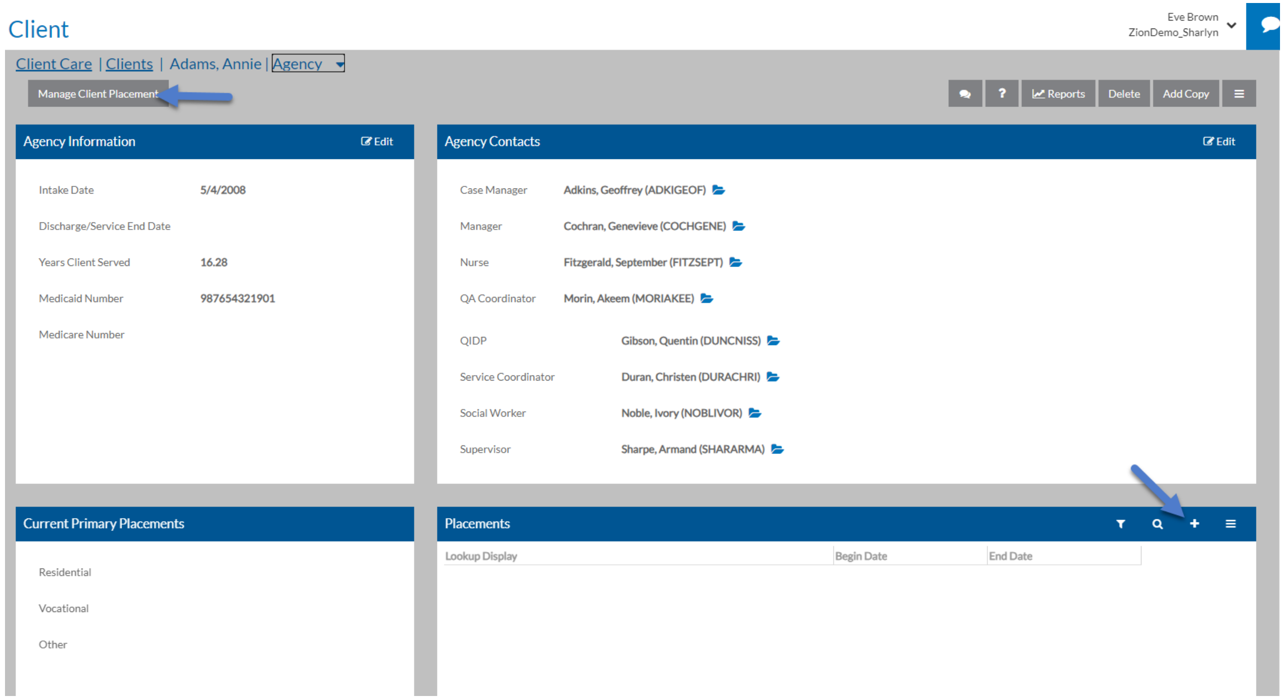


Client Add Wizard

Can also launch the wizard from the Referral from the Create Client button

Client Add Wizard

After adding the client run the Manage Client Placement Wizard or add a Placement



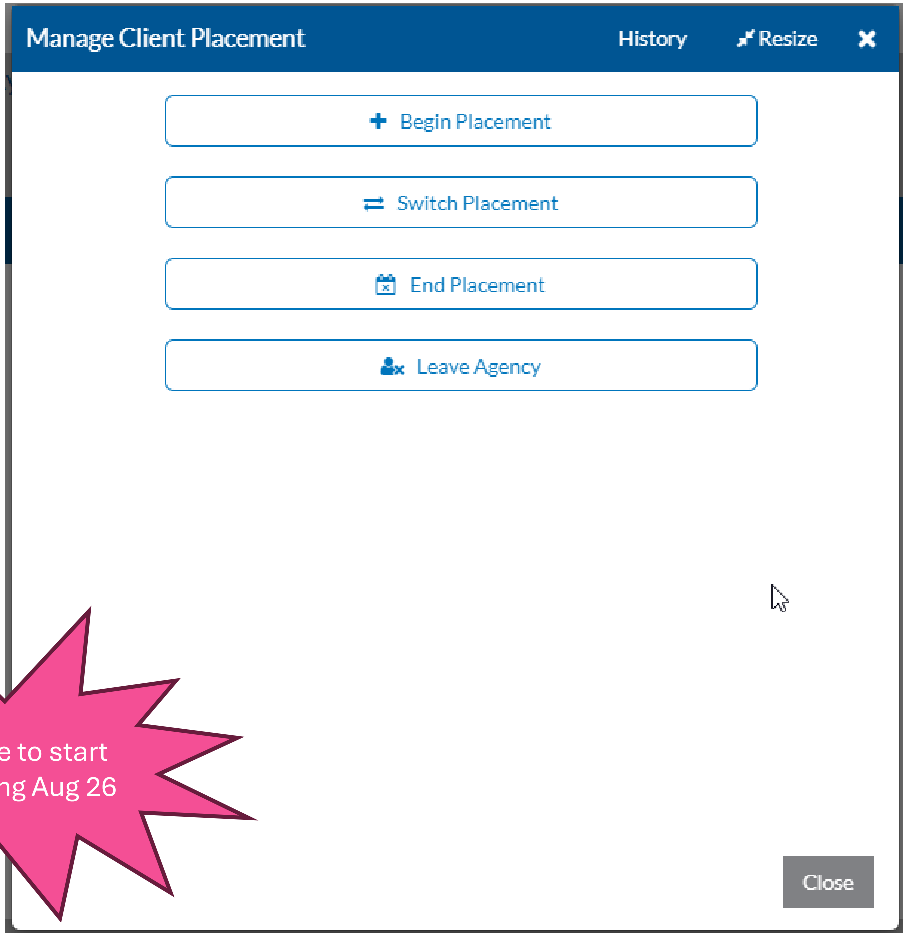
Manage Client Placement Wizards

Manage Client Placements

The Manage Placements wizard guides you through the process of adding and removing a client to or from a Placement. In addition, you have the option to update the client's program plans and miscellaneous collection plans, update the client's billing defaults, and update the open slot count in the placement's Placement Slots.

The Manage Placement wizard has four paths depending on what is happening with the client. You can:

- Add a Placement where the Client will start receiving services
- Switch a Client's Placements when the Client is moving from one Placement to another
- End a Placement when the Client will no longer receive services at that location
- End all Placements when the Client is leaving the agency

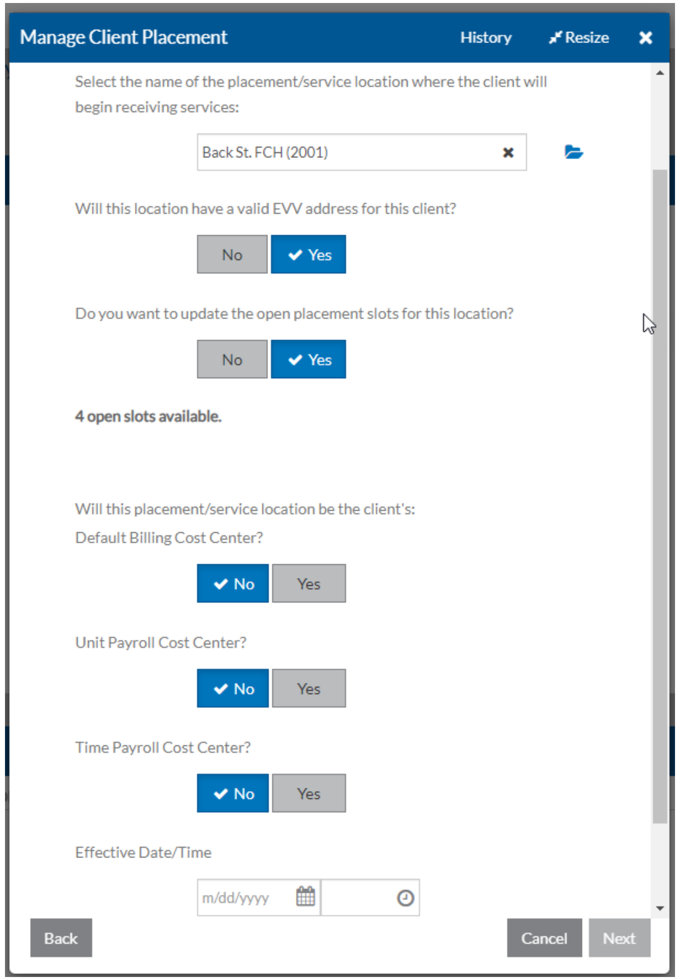


Available to start scheduling Aug 26

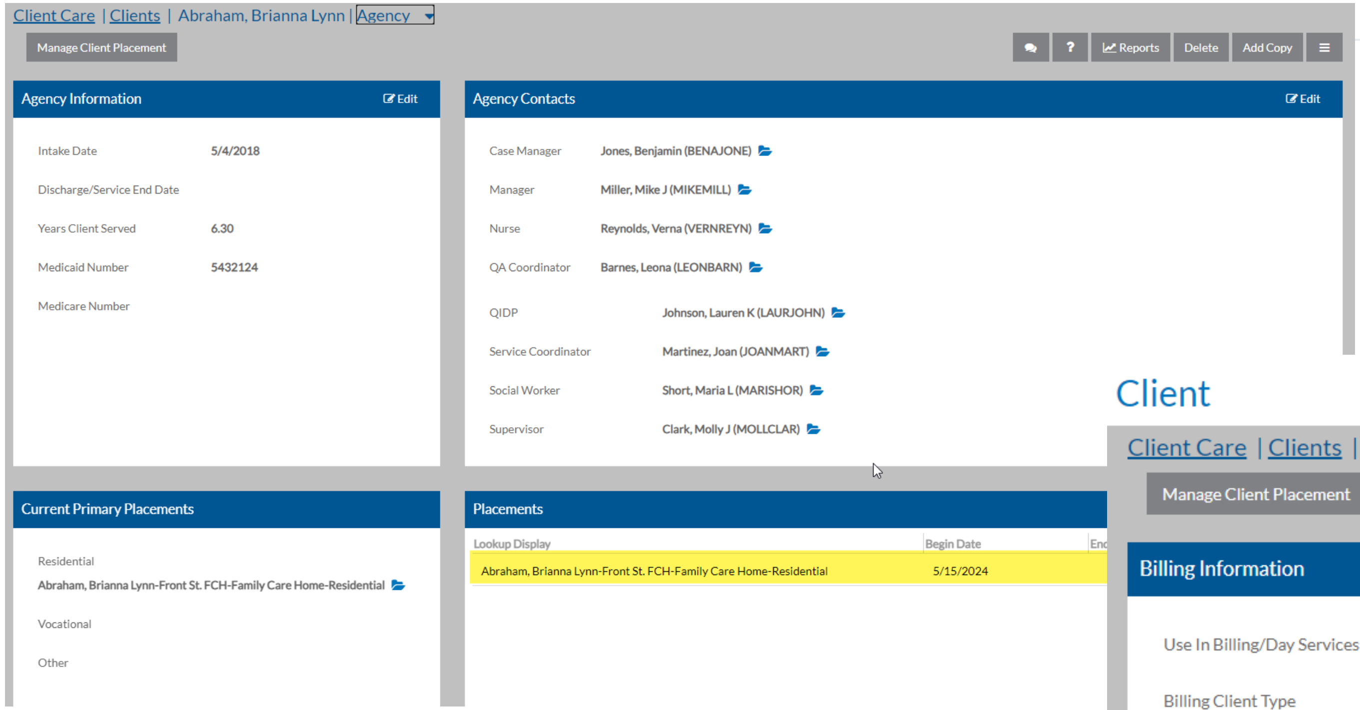
Manage Client Placements

Add a new placement

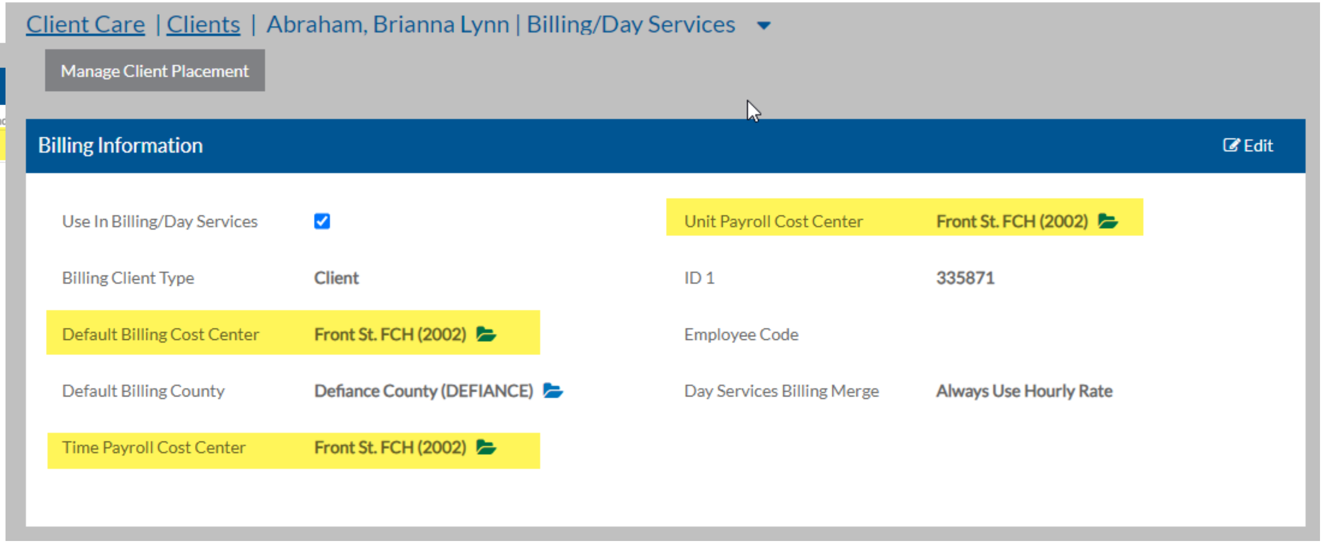
- Placement must be tied to Global Location
- Update Client's Billing Defaults
- Can Sync to Client EVV Address
- Will be set to Primary Placement for type
- Update Placement Slots
- Can Schedule for Future



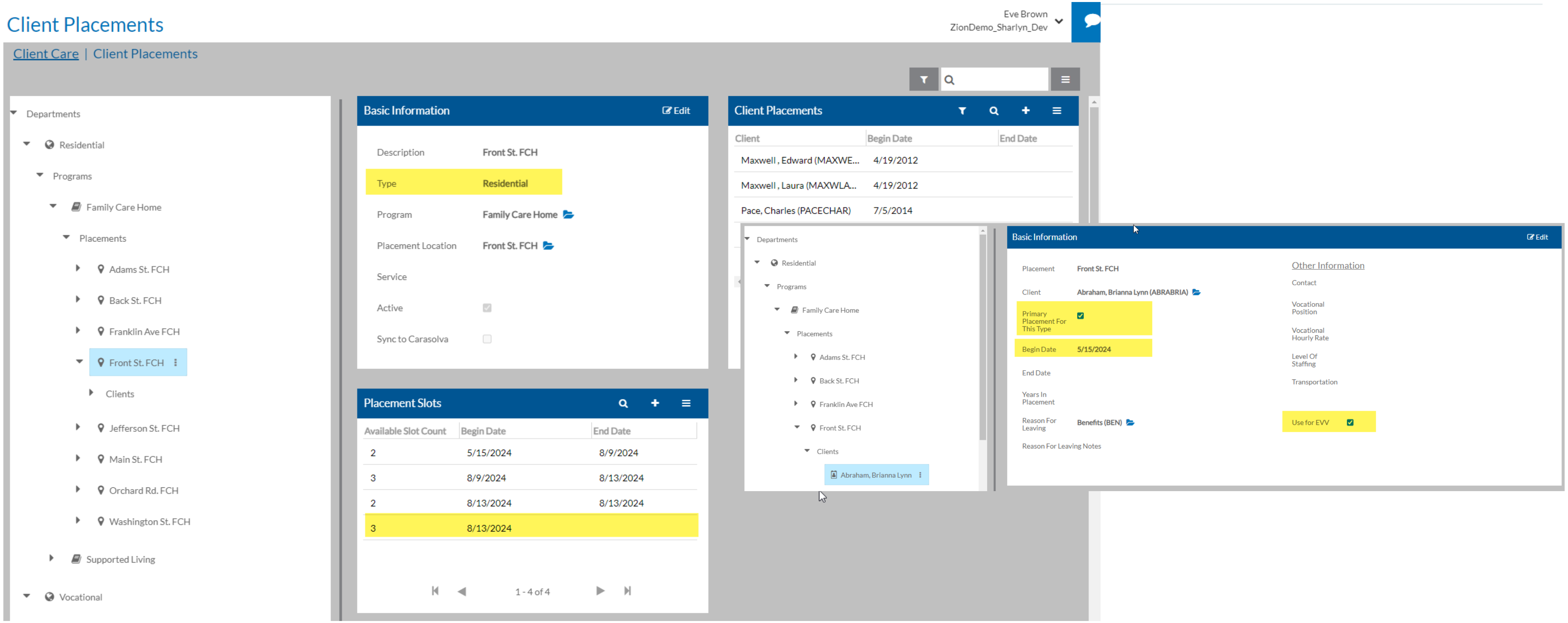
Manage Client Placements



Client



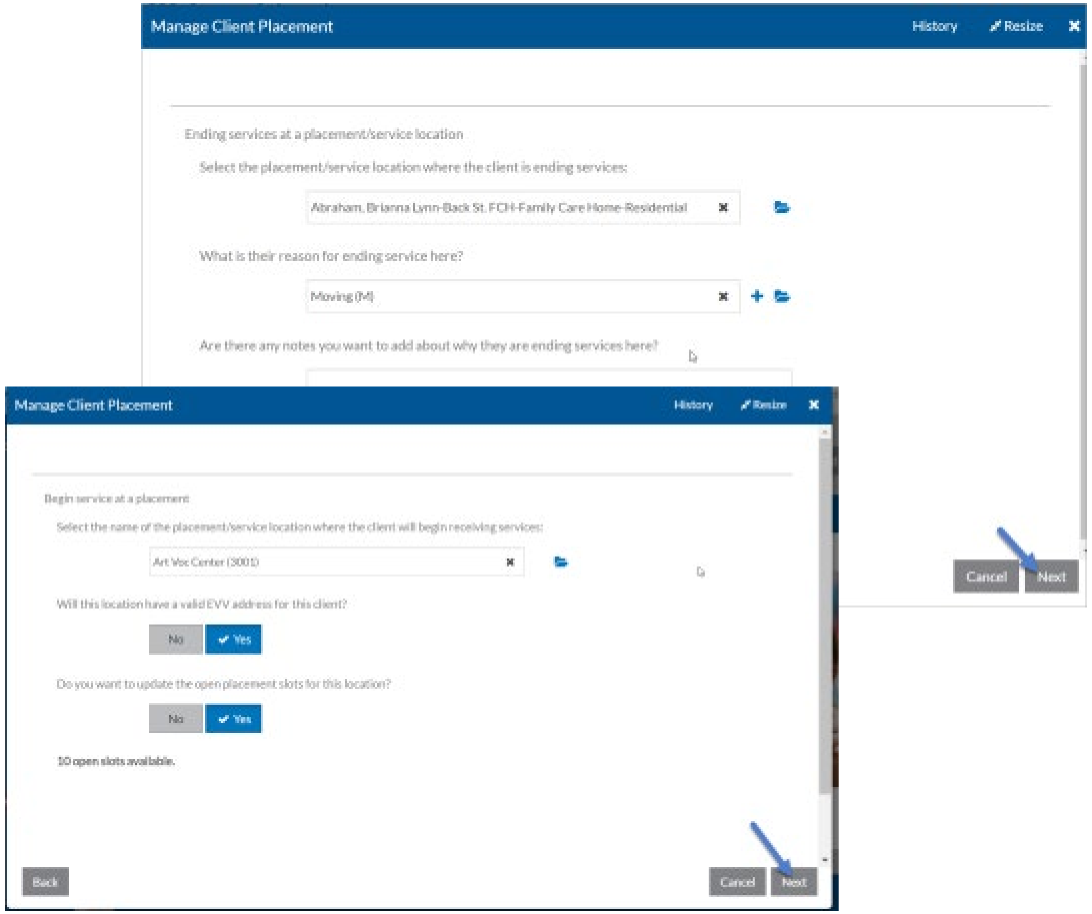
Manage Client Placements



Manage Client Placements

Moving between placements:

- End Placement with reason and notes for ending
- Update open slots
- Add Placement (must be tied to Global Location)
- Can Sync to Client EVV Address
- Will be set to Primary Placement for type
- Update Placement Slots



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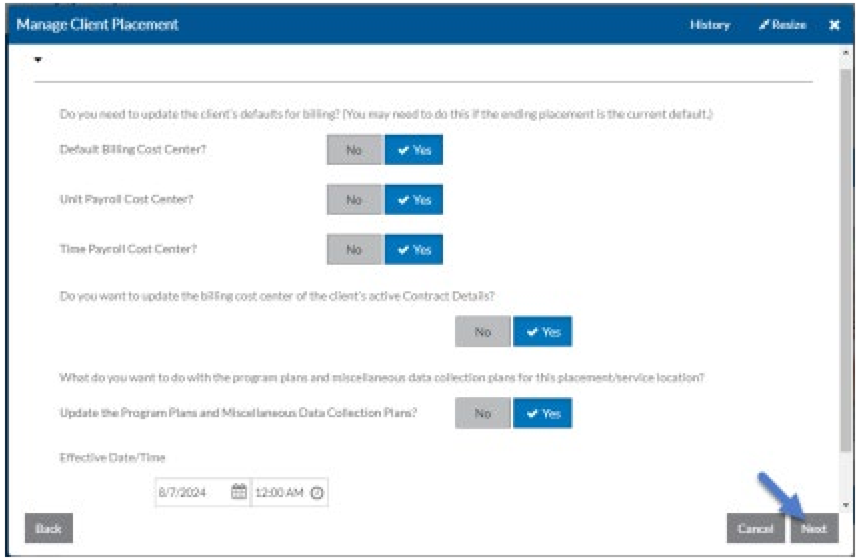
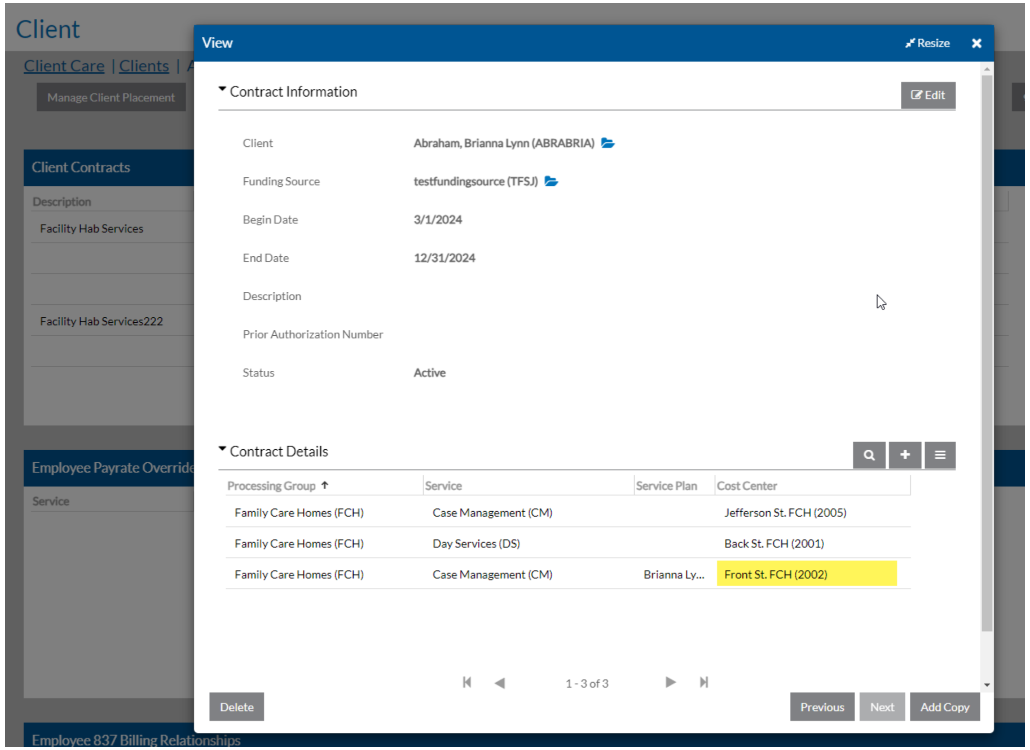
Manage Client Placements

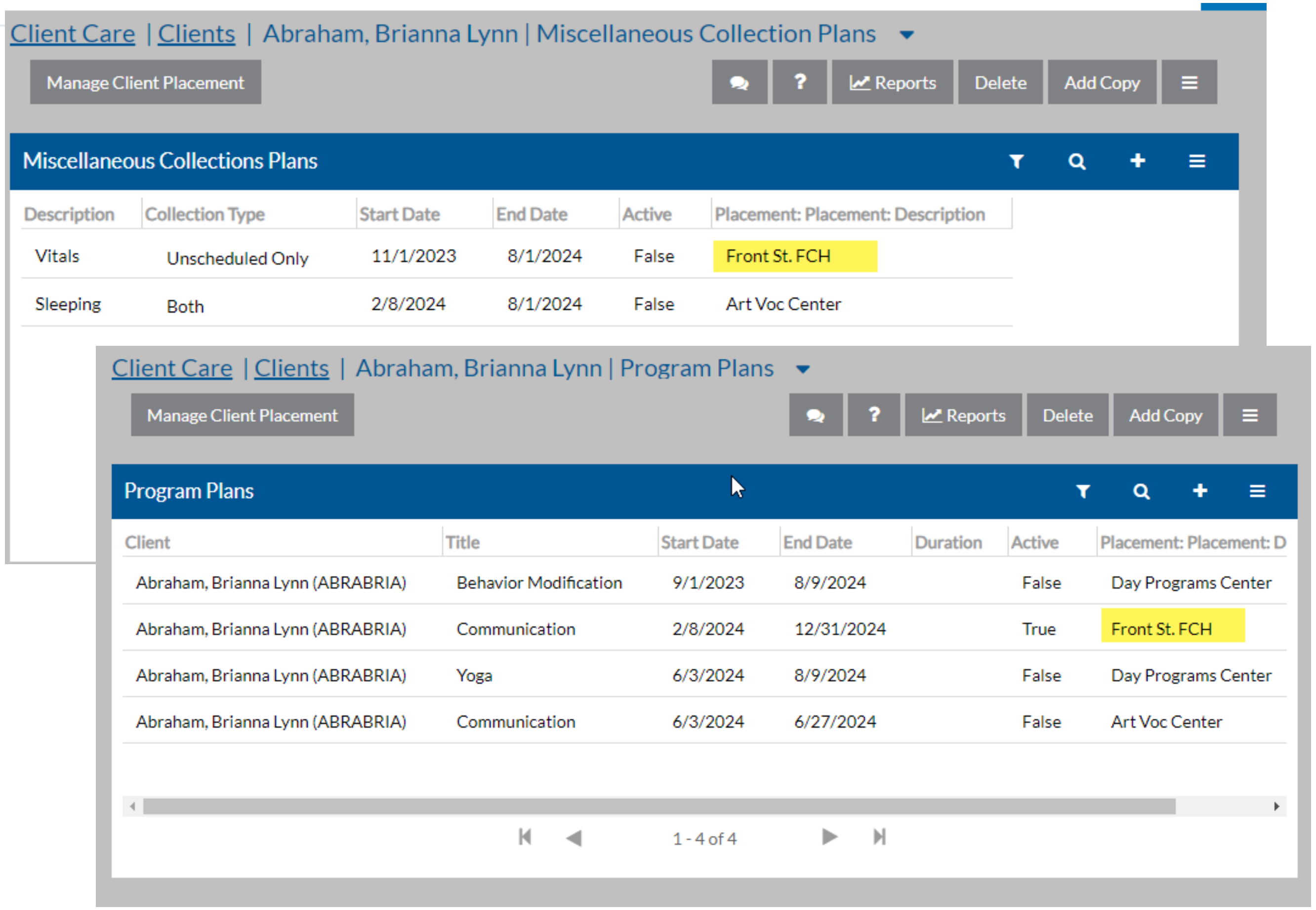
Moving between placements:

- Update Client’s Billing Defaults
- Update Billing Cost Center in Contract Detail
- Update Program Plans and Misc Data Collection Plans
- Can Schedule for Future



Manage Client Placements

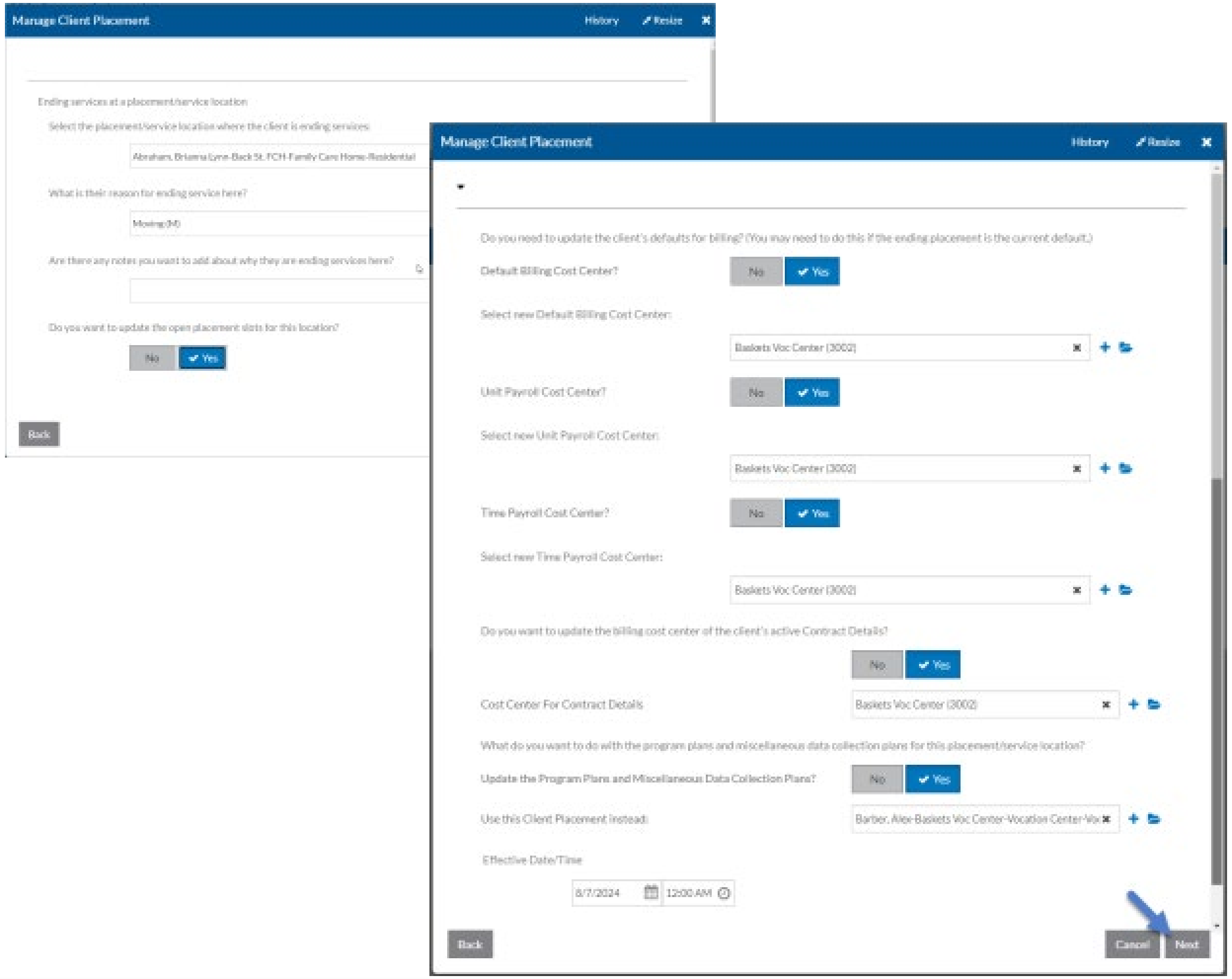




Manage Client Placements

End placements

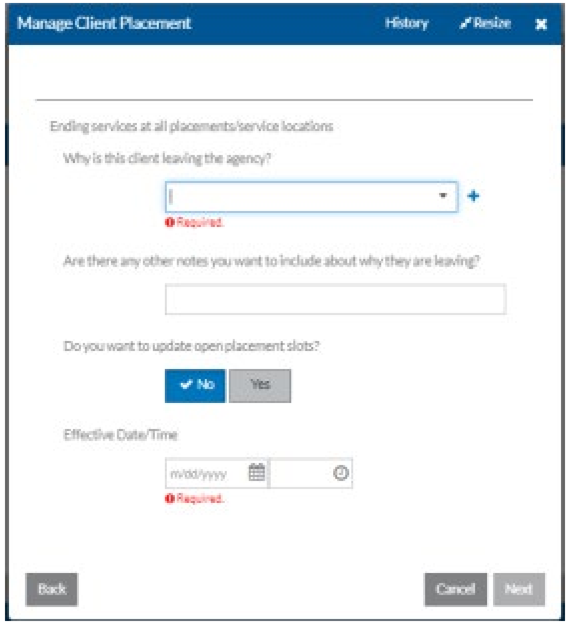
- End Placement with Reason for Ending and Notes
- Update Client’s Billing Defaults & Billing Cost Center in Contract Detail
- Update Program Plans and Misc Data Collection Plans
- Update Placement Slots
- Can Schedule for Future



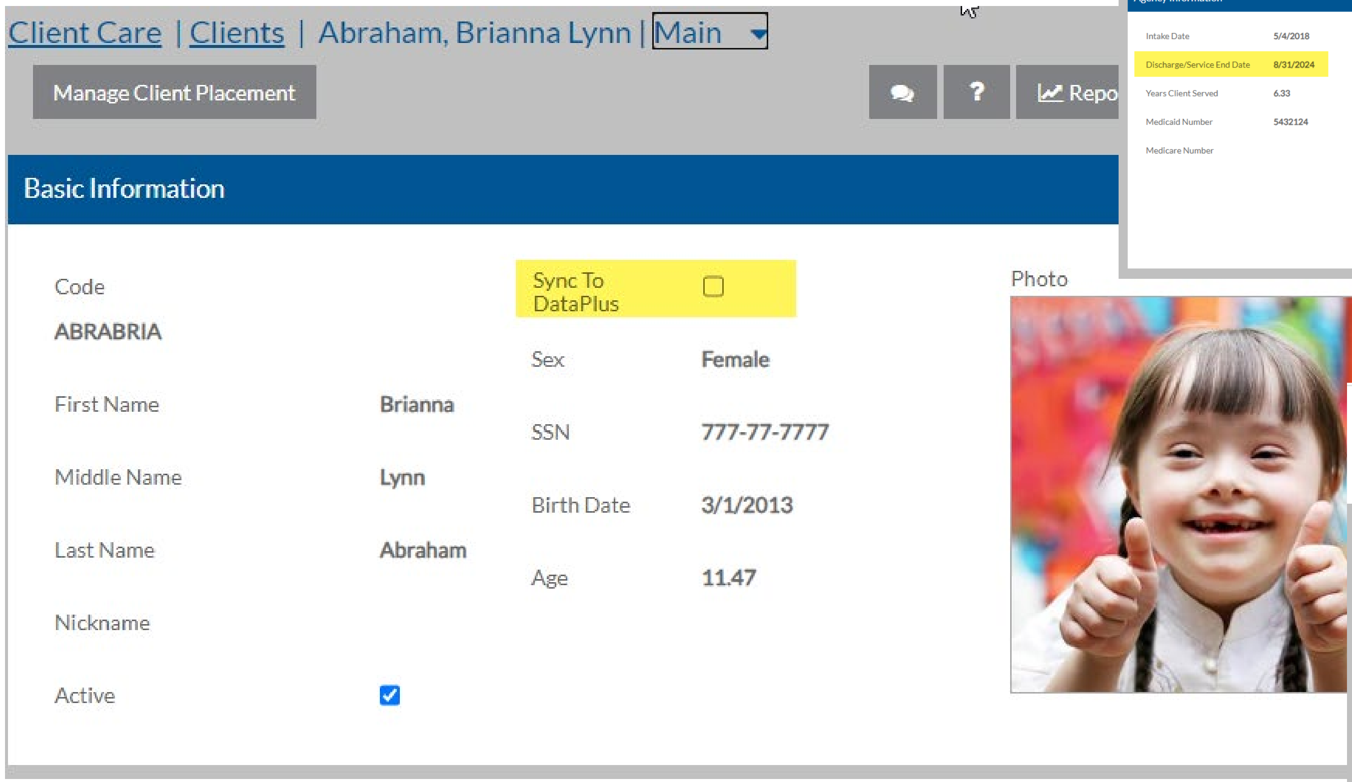
Manage Client Placements

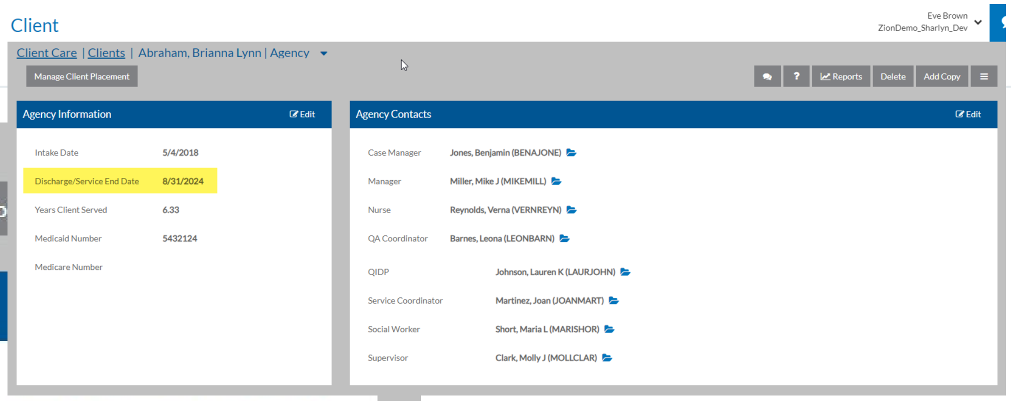
Leave agency

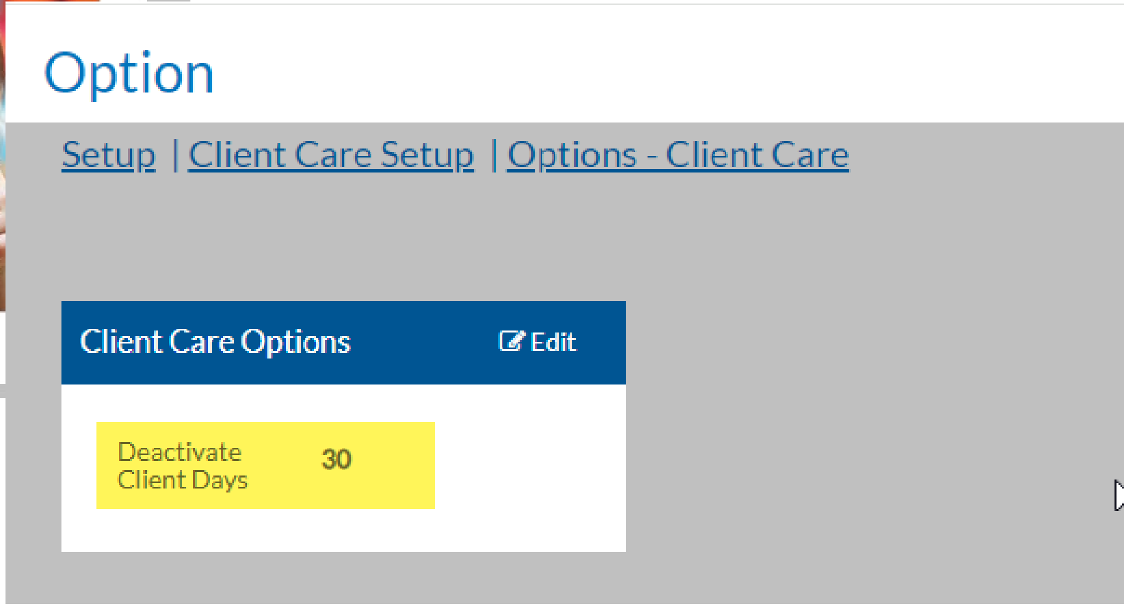
- End All Placements with Reason for Ending and Notes
- Update Client’s Discharge Dates
- Leaves Active Selected for X Days
- Clears Sync to DataPlus
- Can Schedule for Future



Manage Client Placements







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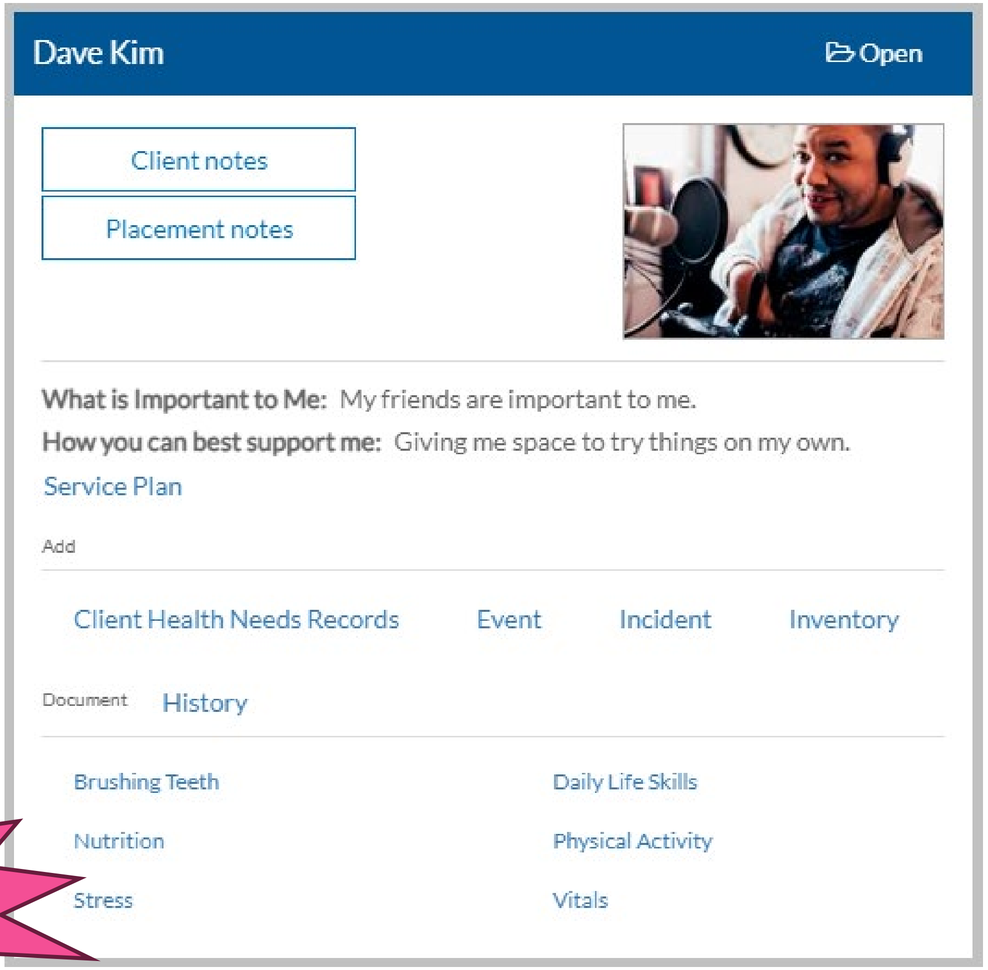
Service Plans

Service Plans

The Service Plan gives agencies and caregivers:

- A single view of the client's Program Plans, Collection Plans and Contract Details in one place
- Pertinent client information so they no longer have to piece it together.
- Ability to quickly see what's important to the client and open the service plan directly from the Task dashboard



Available to schedule now

Sandata

Service Plans

Client Care | Service Plans | Dave Kim Jan 02 24 -

Reports | Delete | Add Copy

Photo

My Service Plan

Edit

Client	Kim , Dave (KIMDAVE)	Marital Status	Single	Audio Consent	Full (F)
Start Date	1/2/2024	Age	67.36	Video Consent	Full (F)
End Date		Religion	Baptist (BA)	DNR Type	State Order (S)
External ID		Sex	Male		

Details

These are the details of Dave's service plan. It outlines his plans for the year of 2024.

About Me

Edit

My living environment	My interests and activities	What is important to me	How you can best support me
I live in a group home with 3 other roommates.	I like listening to music and playing drums.	My friends are important to me.	Giving me space to try things on my own.

Contract Details

Description	Client Contract ID: Funding Source	Cost Center	Service	Contract Code	Begin Da
	State 837I Funding Source (STATE837I)	Adams St. FCH (2006)	ICFM...	ICFMR (ICF...	2/5/20

Program Plan Objectives

Objective	Collection Type	Start Date	End Date	Result Picklist	Last Collection Date	Collection Result	Collection Notes	ID
Brush teeth2X a day when prompted	Unscheduled Only	1/1/2024		Results: Compl/Incmpl/Ref/NA: Show Notes	2/27/2024 7:41 AM	Refused		27

1 - 1 of 1

Miscellaneous Data Collection Plans

Description	Placement	Start Date	Last Collection Date	Collection Result	Collection Notes
Physical A...	Kim , Dave-Main St. FCH-Family Care Home-Residential	10/1/2020	2/26/2024 11:08 AM	Collected	
Daily Life ...	Kim , Dave-Main St. FCH-Family Care Home-Residential	1/1/2020	2/27/2024 7:41 AM	Collected	

1 - 2 of 2

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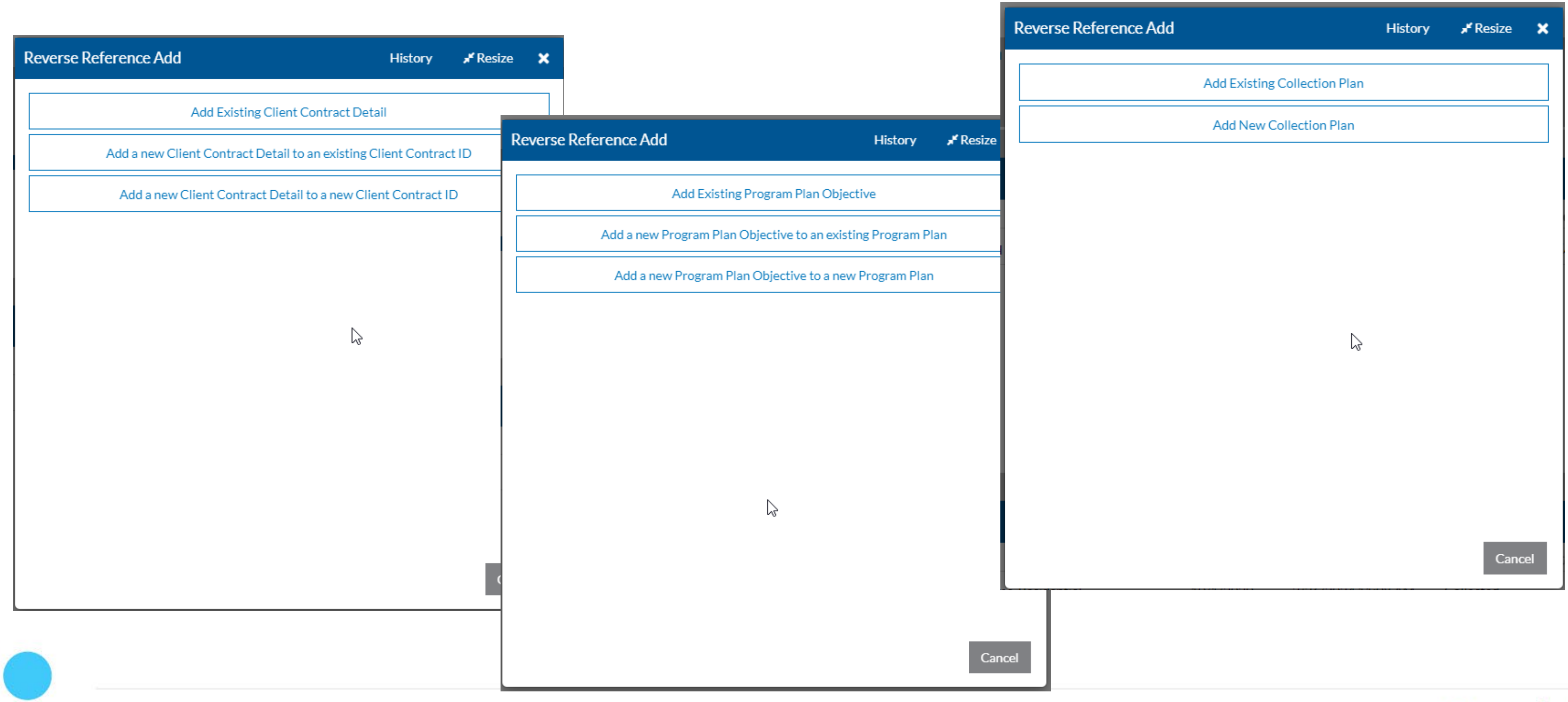
Service Plans



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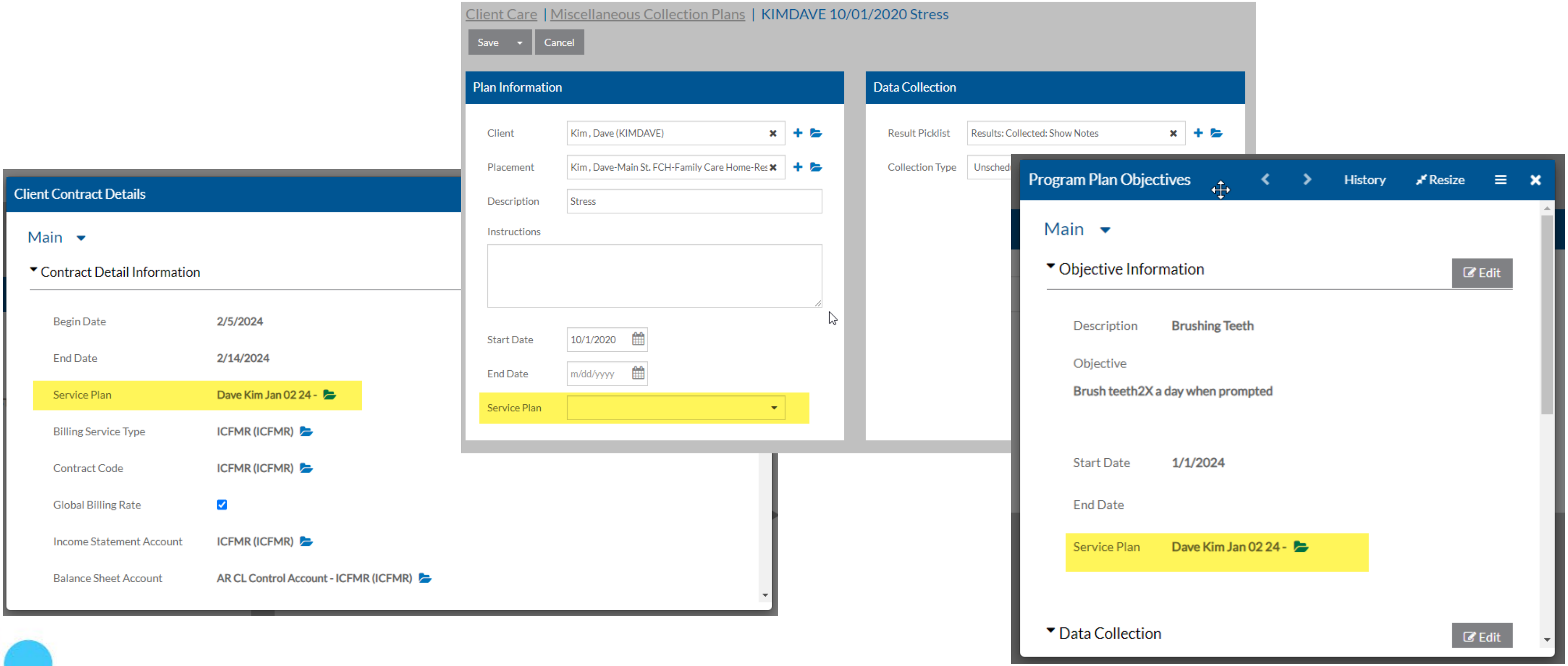
Service Plans



Quizzes

Quiz Management

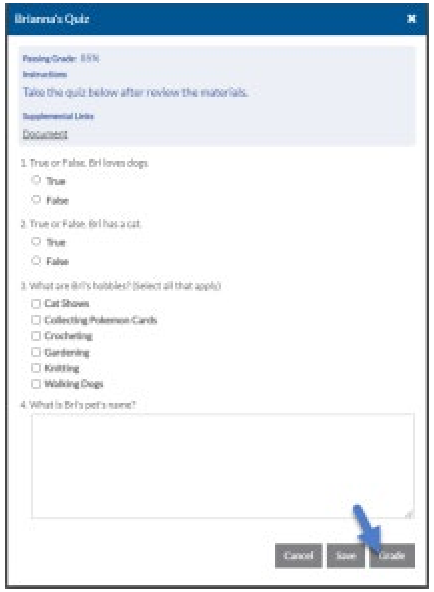
The Quiz Management module allows you to:

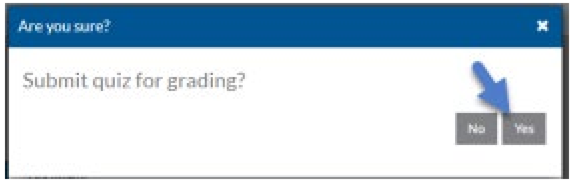
- Provide learning content (PDFs, documents, links to videos, etc.) to employees
- Administer an open-notes, auto-graded quiz to them about that content.

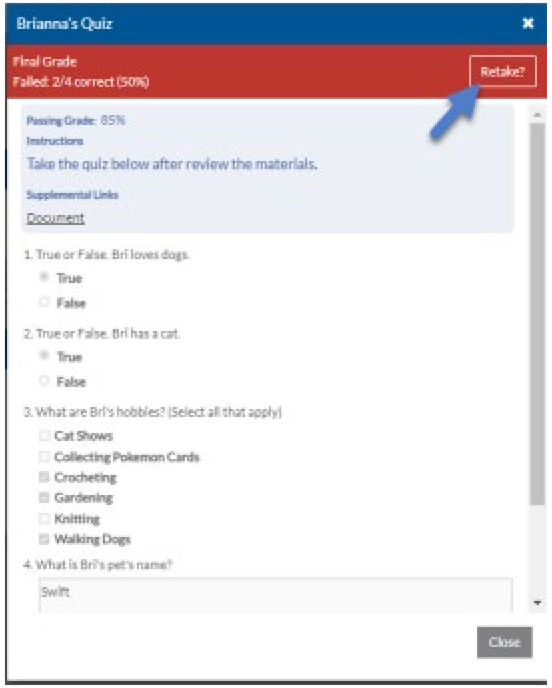
The quiz can be about a:

- Client (or a Client in relation to their Placement)
- Placement
- Other topic

Available for purchase now

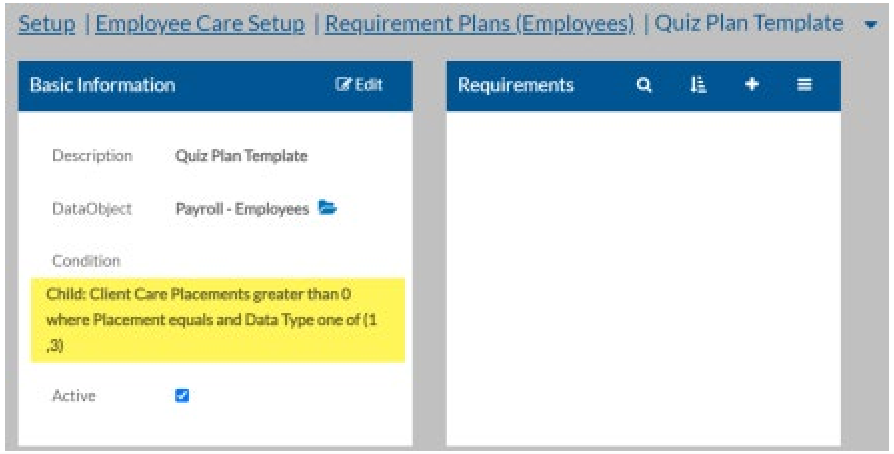


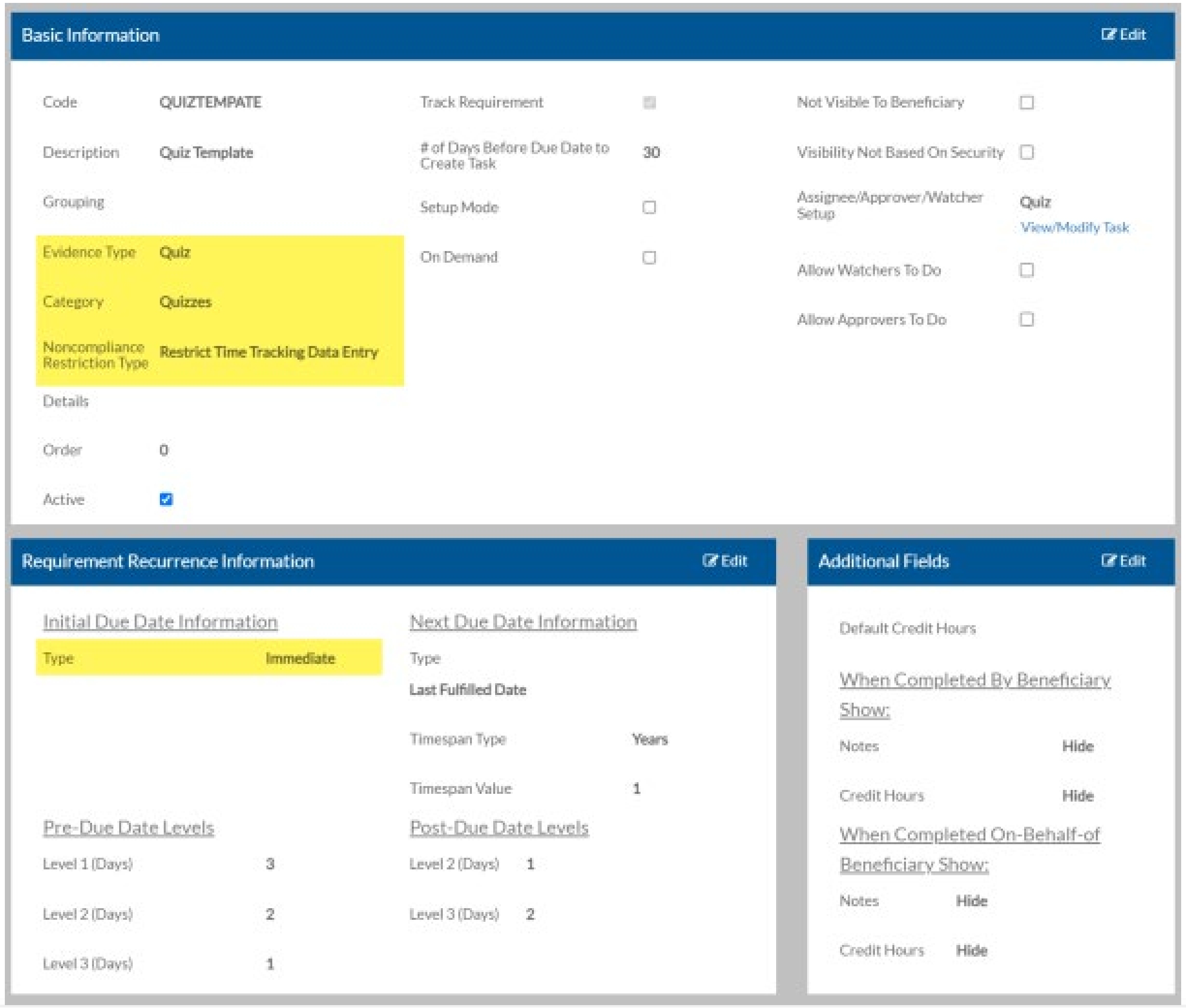




Quiz Management

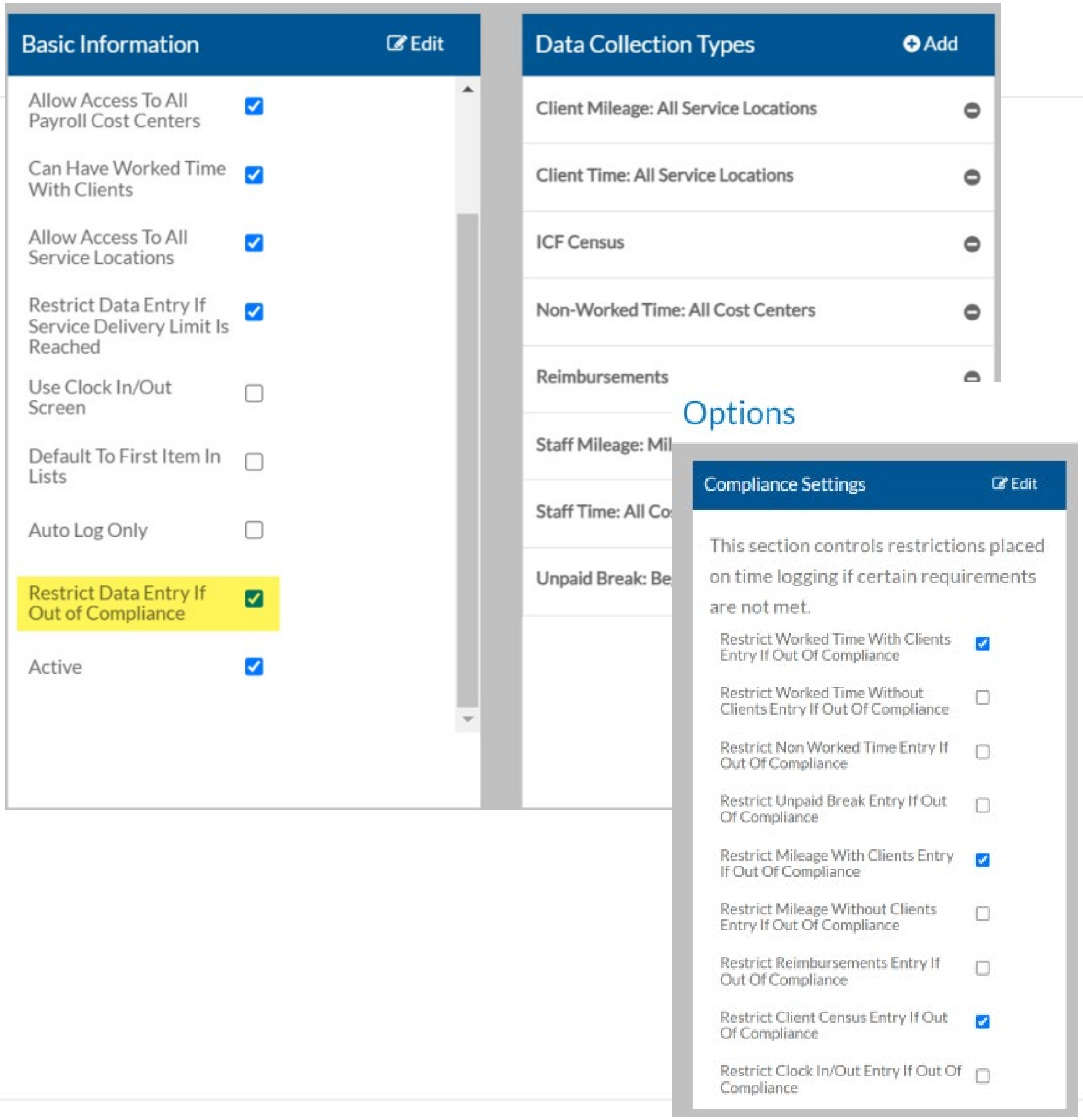
- The quiz is associated with an employee requirement (which can optionally be auto-generated) to track compliance
- The requirement is assigned to a requirement plan (which can optionally be auto-generated) to determine who must take it.

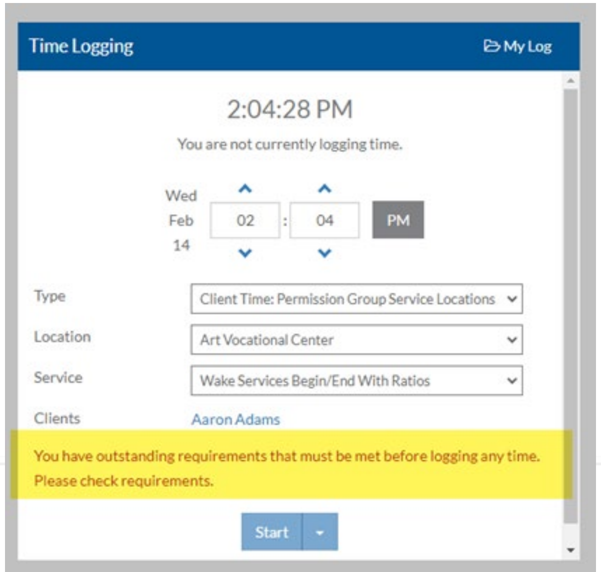




Quiz Management

- Based on the requirement's settings, staff permission group settings, and the passing score designated in the quiz, if the employee does not pass the quiz the employee can optionally be prevented from logging Time Tracking entries (the agency can designate which entries are locked out via Time Tracking Options).





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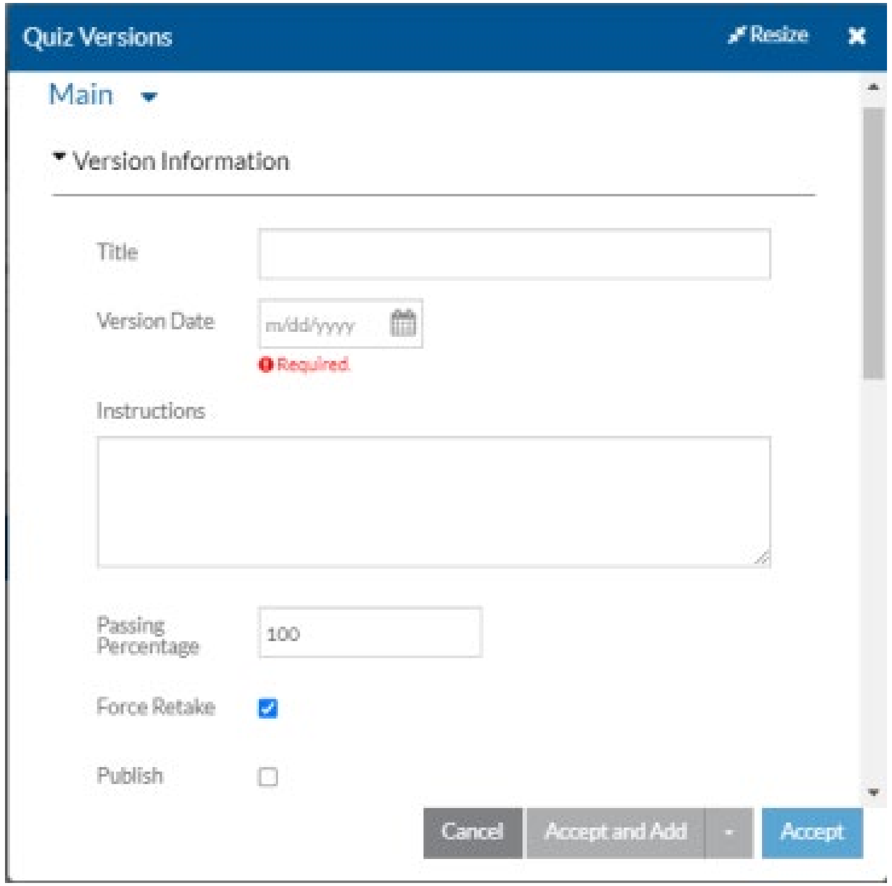
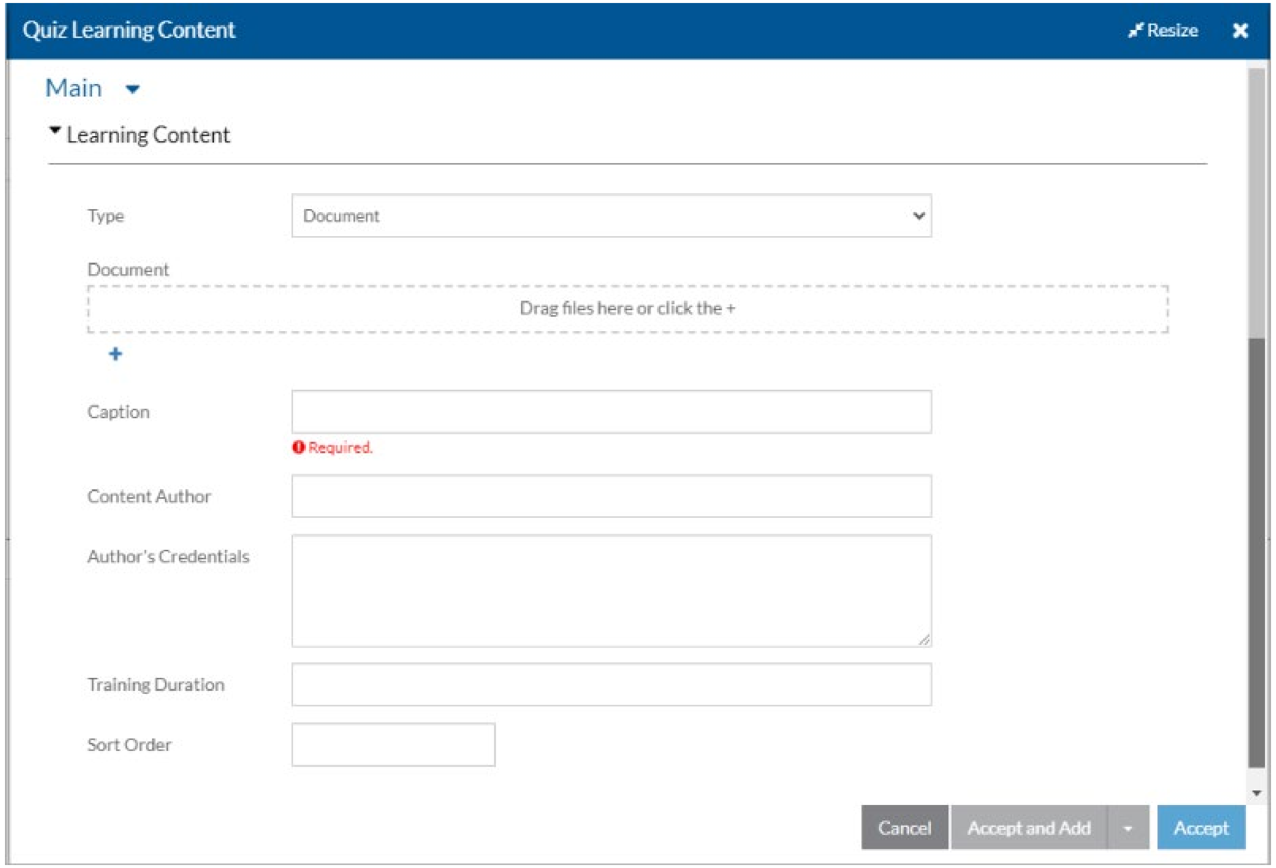
Quiz Management

- If a new version of the quiz is needed, the agency can require everyone to retake the quiz immediately or set it so the new version of the quiz appears the next time the employee is required to take it and when new employees are required to take it.



Quiz Management

Learning Content can be a link to a video or website or to a PDF



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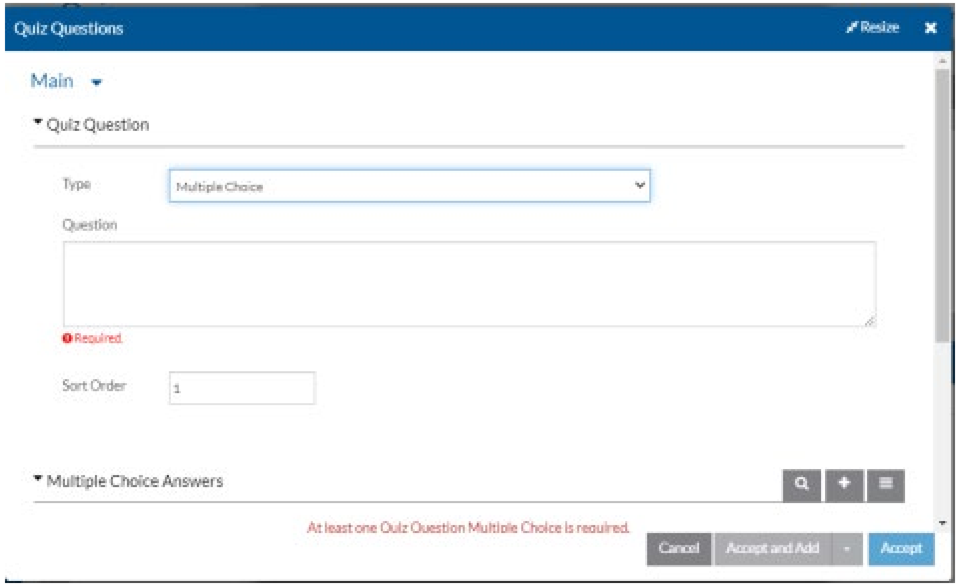
Quiz Management

Questions can be:

- True or False
- Multiple Choice
- Fill in Blank



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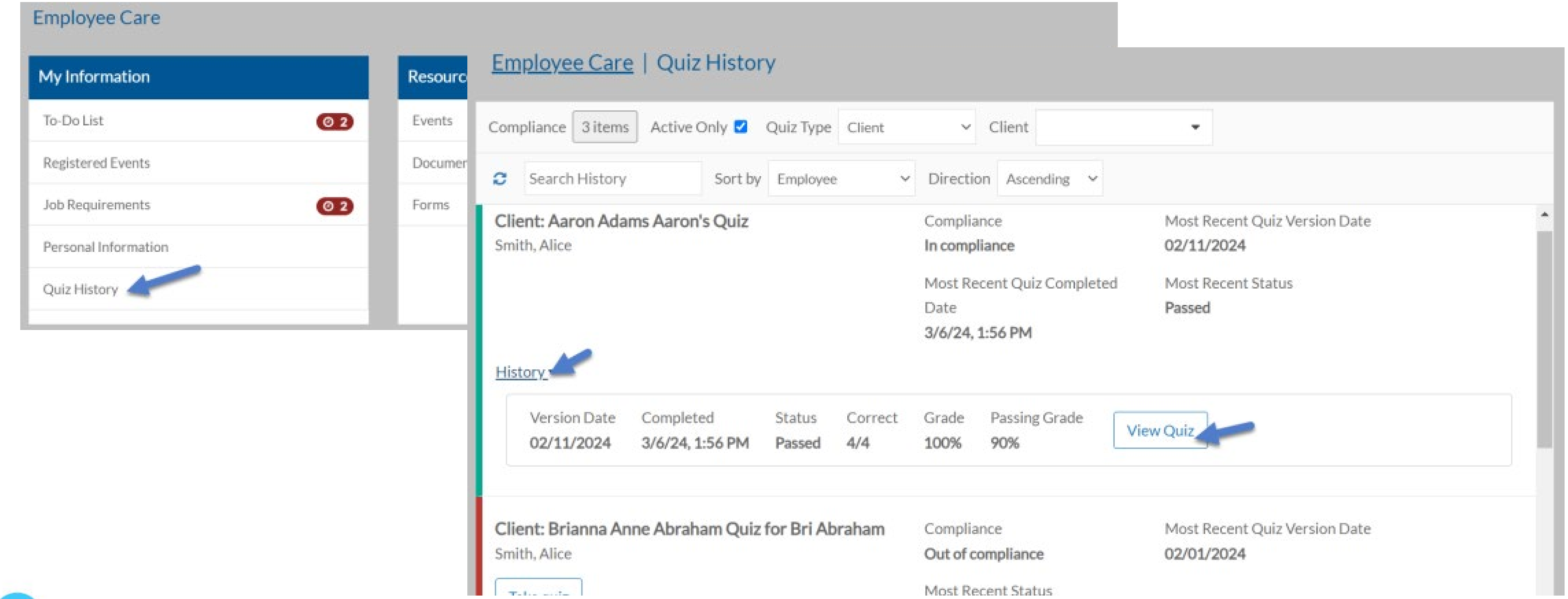
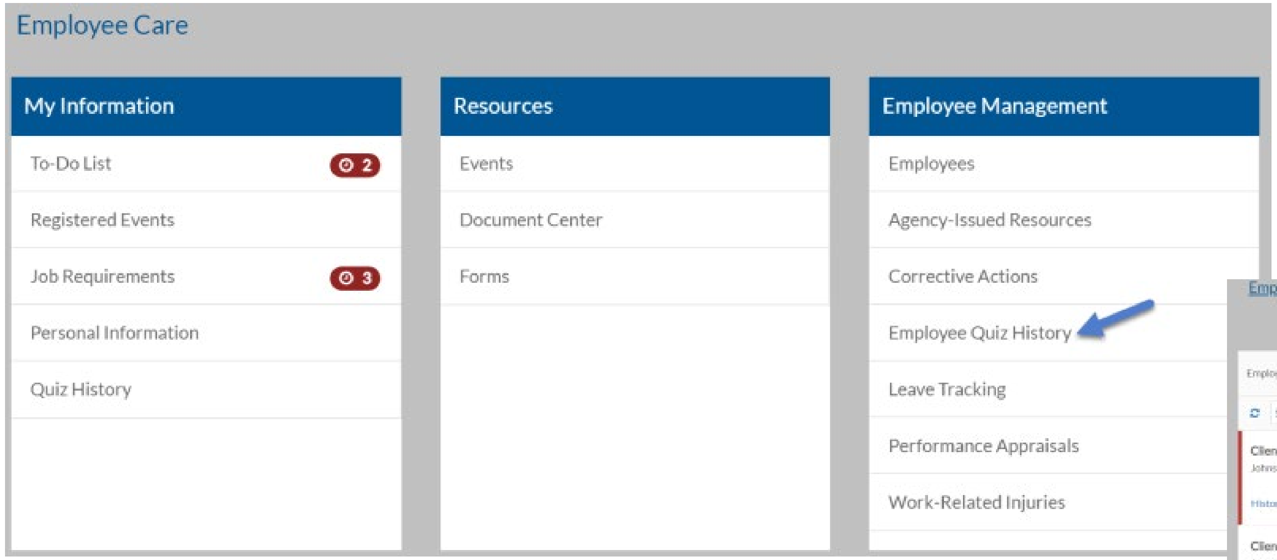
Quiz Management

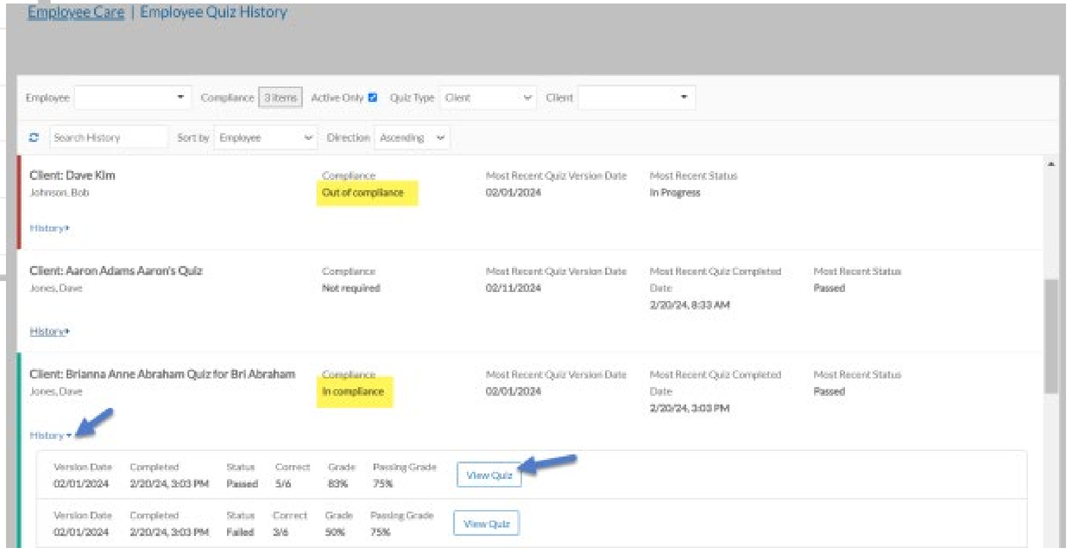
Staff can view their own quiz history:



Quiz Management

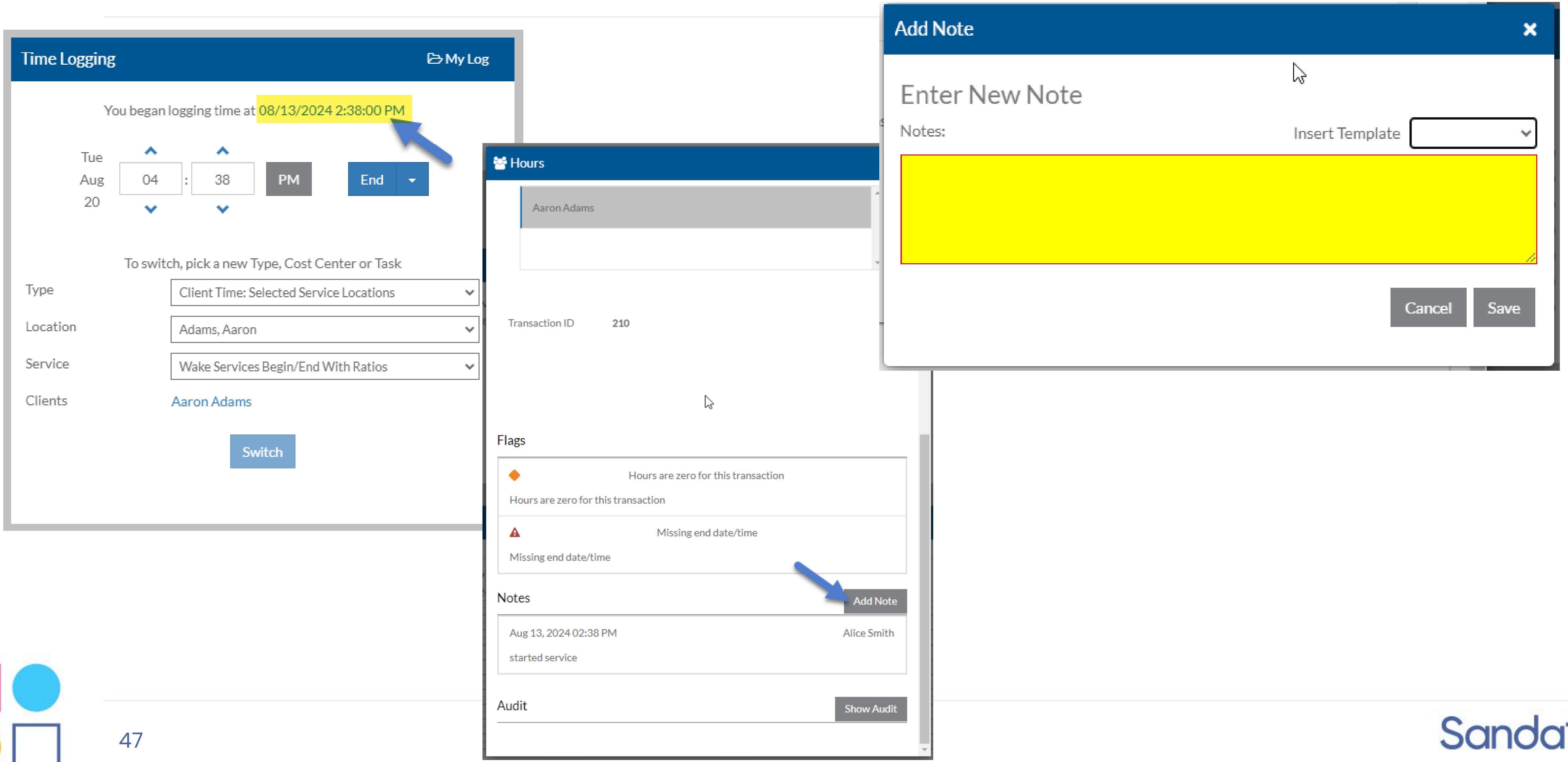
Managers can view the quiz history of their staff and see if they are in compliance at a glance.



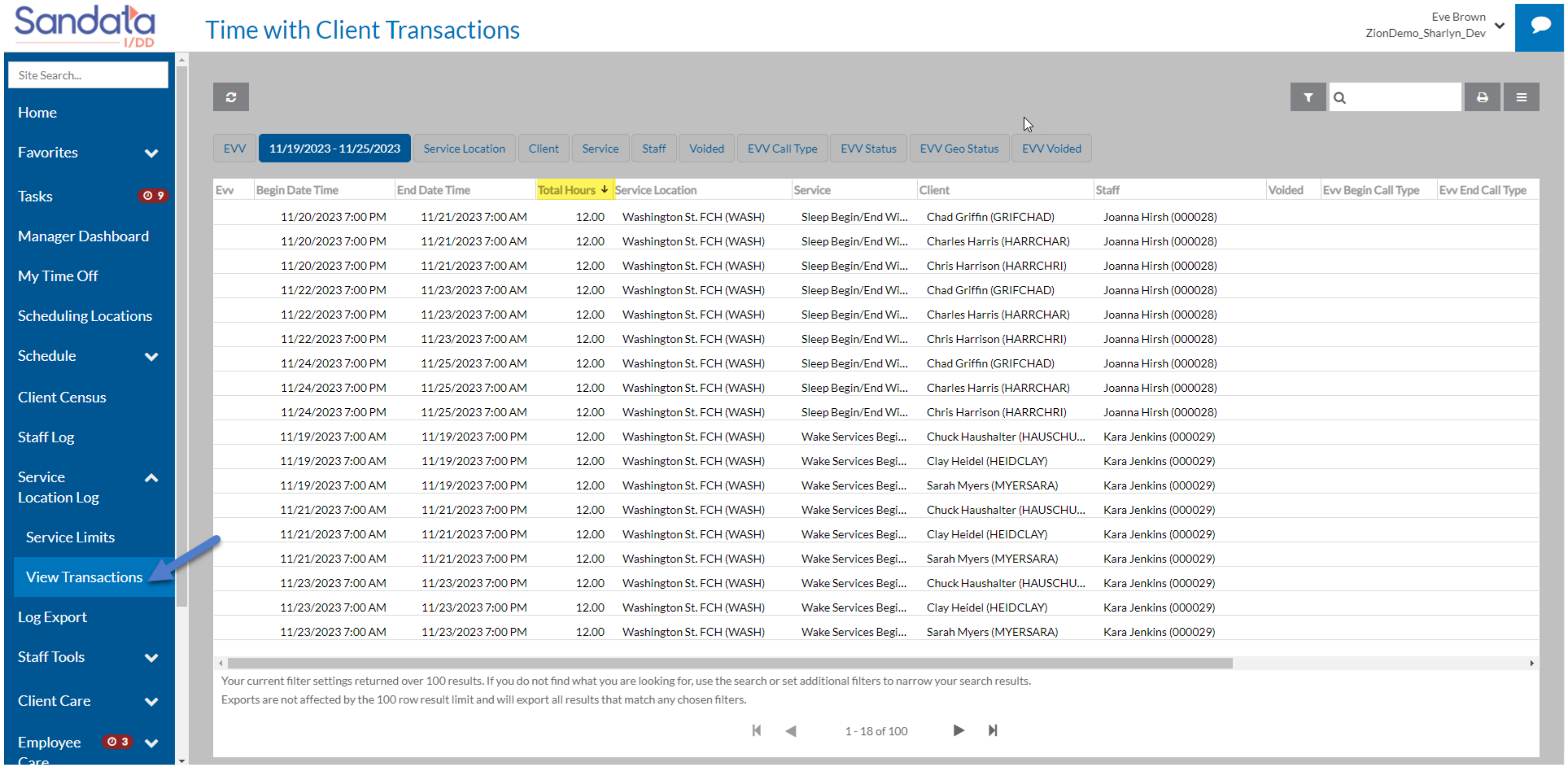


Other Tips

Add a Note to a Log Entry in Progress



Time with Client Transactions



Evv	Begin Date Time	End Date Time	Total Hours	Service Location	Service	Client	Staff	Voided	Evv Begin Call Type	Evv End Call Type
	11/20/2023 7:00 PM	11/21/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chad Griffin (GRIFCHAD)	Joanna Hirsh (000028)			
	11/20/2023 7:00 PM	11/21/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Charles Harris (HARRCHAR)	Joanna Hirsh (000028)			
	11/20/2023 7:00 PM	11/21/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chris Harrison (HARRCHRI)	Joanna Hirsh (000028)			
	11/22/2023 7:00 PM	11/23/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chad Griffin (GRIFCHAD)	Joanna Hirsh (000028)			
	11/22/2023 7:00 PM	11/23/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Charles Harris (HARRCHAR)	Joanna Hirsh (000028)			
	11/22/2023 7:00 PM	11/23/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chris Harrison (HARRCHRI)	Joanna Hirsh (000028)			
	11/24/2023 7:00 PM	11/25/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chad Griffin (GRIFCHAD)	Joanna Hirsh (000028)			
	11/24/2023 7:00 PM	11/25/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Charles Harris (HARRCHAR)	Joanna Hirsh (000028)			
	11/24/2023 7:00 PM	11/25/2023 7:00 AM	12.00	Washington St. FCH (WASH)	Sleep Begin/End Wi...	Chris Harrison (HARRCHRI)	Joanna Hirsh (000028)			
	11/19/2023 7:00 AM	11/19/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Chuck Haushalter (HAUSCHU...	Kara Jenkins (000029)			
	11/19/2023 7:00 AM	11/19/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Clay Heidel (HEIDCLAY)	Kara Jenkins (000029)			
	11/19/2023 7:00 AM	11/19/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Sarah Myers (MYERSARA)	Kara Jenkins (000029)			
	11/21/2023 7:00 AM	11/21/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Chuck Haushalter (HAUSCHU...	Kara Jenkins (000029)			
	11/21/2023 7:00 AM	11/21/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Clay Heidel (HEIDCLAY)	Kara Jenkins (000029)			
	11/21/2023 7:00 AM	11/21/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Sarah Myers (MYERSARA)	Kara Jenkins (000029)			
	11/23/2023 7:00 AM	11/23/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Chuck Haushalter (HAUSCHU...	Kara Jenkins (000029)			
	11/23/2023 7:00 AM	11/23/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Clay Heidel (HEIDCLAY)	Kara Jenkins (000029)			
	11/23/2023 7:00 AM	11/23/2023 7:00 PM	12.00	Washington St. FCH (WASH)	Wake Services Begi...	Sarah Myers (MYERSARA)	Kara Jenkins (000029)			

Q&A

Thank You

Next New Feature Webinar October 15, 2024 at 1:00 PM