Sandata Mobile Connect Guide

An Employee's guide on how to use the Sandata Mobile Connect App. (SMC)

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Contents

What is Sandata Mobile Connect (SMC) 2
The Roles in SMC 2
Setting up the SMC app. 3
Setting up Security Questions 4
Setting Up Your Password 5
Using the Menu Bar 6
Menu Bar Options 6
Starting a Visit 7
Starting an Unknown Visit 9
Completing a Visit 11
Client Verification 14
Abandoning a Visit 19

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What is Sandata Mobile Connect (SMC)

- The Sandata Mobile Connect app., also referred to as SMC is a software application that runs on a mobile device such as a smartphone or tablet. This means employees can download the mobile app. to their smartphone or tablet and use it to record details about the services they provided during a visit. If the employee does not have a mobile device, they can use the Fixed Visit Verification method (FVV).

  NOTE: FVV may not be applicable to your program.

The Roles in SMC

- Employee = The person providing care.
  - Clocks in and out using either the client's phone, Sandata's Mobile Connect App. or a Fixed Visit Verification device. Check with your program to know which is used and preferred.

- Client = The person receiving care.
  - Will use the EVV website to edit and approve visits.

- Designee = A Client's representative
  - A person designated to handle the client's responsibilities when they are unable to do so.

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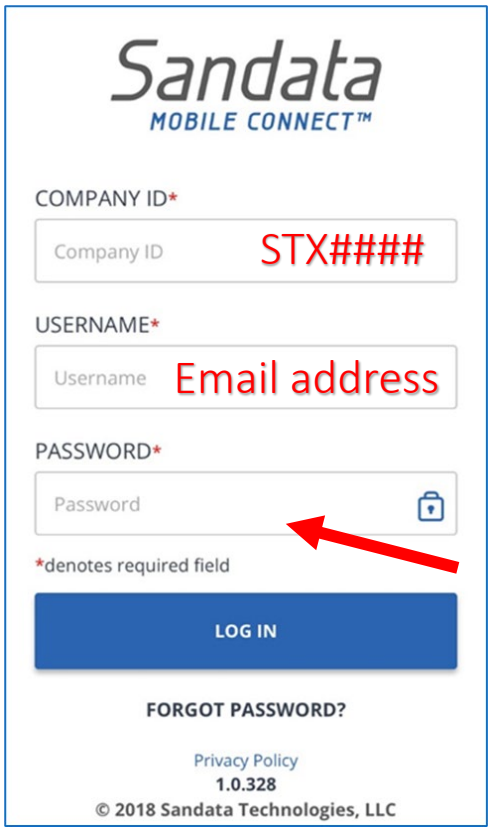
Setting up the SMC app.

Refer to the "**How to Download the SMC Mobile app.**" quick reference page to learn how to install the SMC app. on your mobile device. Both iOS and Android versions are available.

- Install the SMC mobile app. on your smartphone or tablet
- Tap the SMC icon to launch the mobile app.

Your login credentials will be provided to you. After opening the app for the first time, you'll need to enter the following required information;



PASSWORD
The temporary password you received in email

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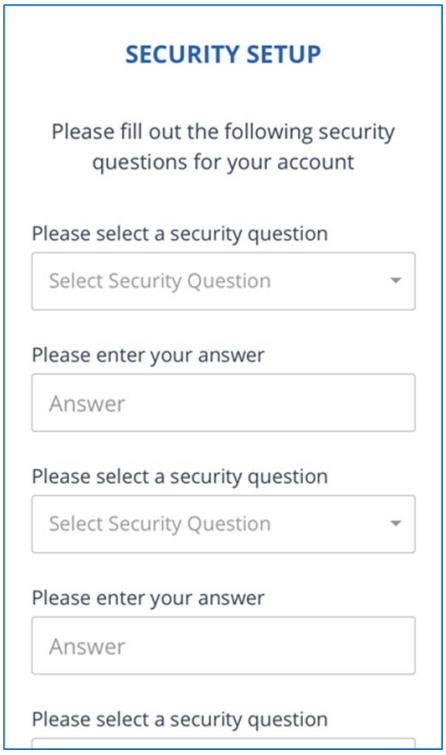
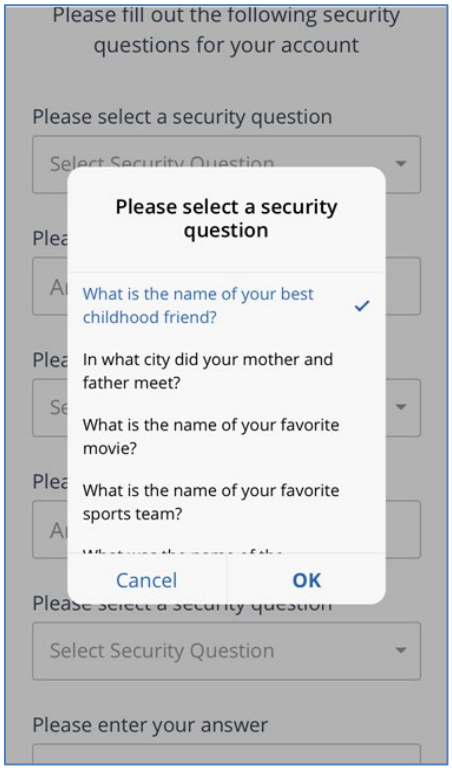
Setting up Security Questions

You will need to select and answer several security questions the first time you log in.



Your answers should be…

- Be easy to remember
- Not be easily guessed
- Not change over time



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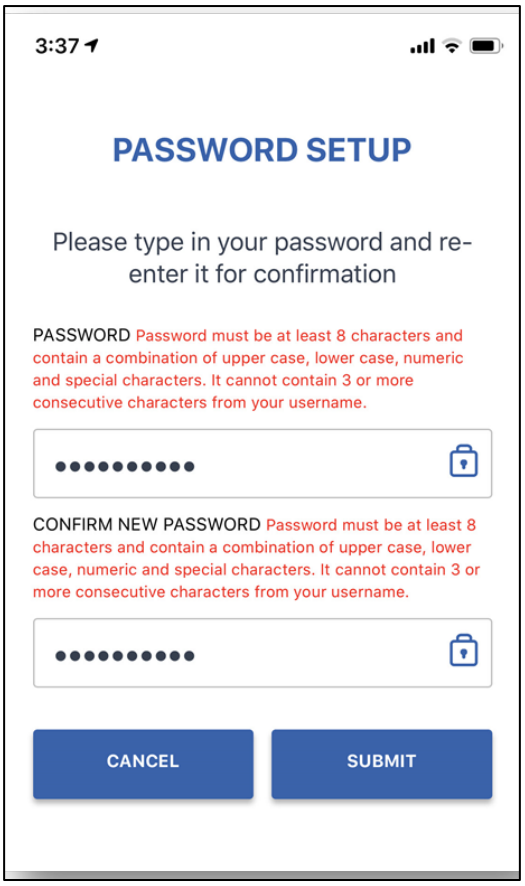
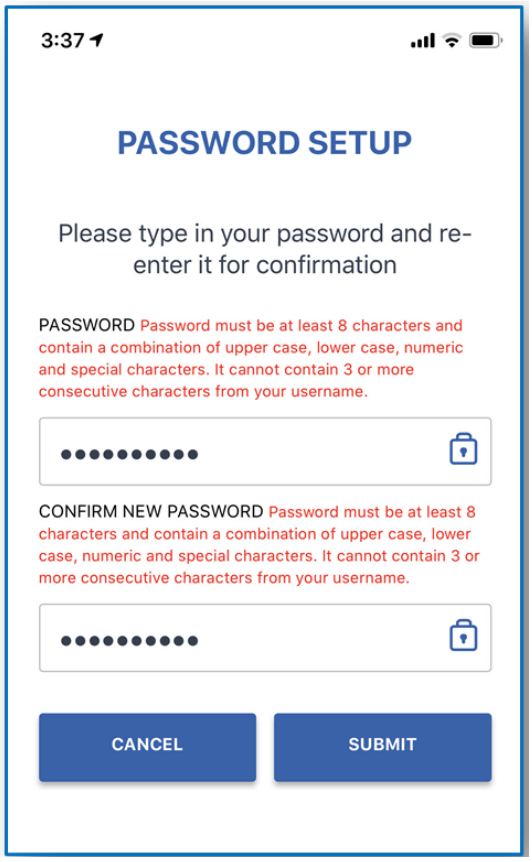
Setting Up Your Password

<u>Passwords MUST have:</u>

At least 1 upper case letter
At least 1 lower case letter
At least 1 number
At least 1 special character (@#$%^)
Be at least 12 characters long

Example: **Password2020!**





- Enter and re-enter a new password
- Tap **SUBMIT**
  NOTE: Passwords are case sensitive

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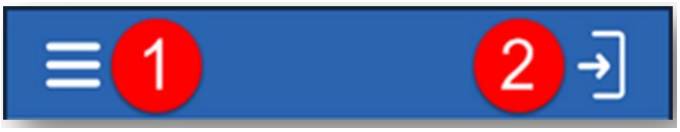
Using the Menu Bar

The menu bar is displayed at the top of the mobile app.

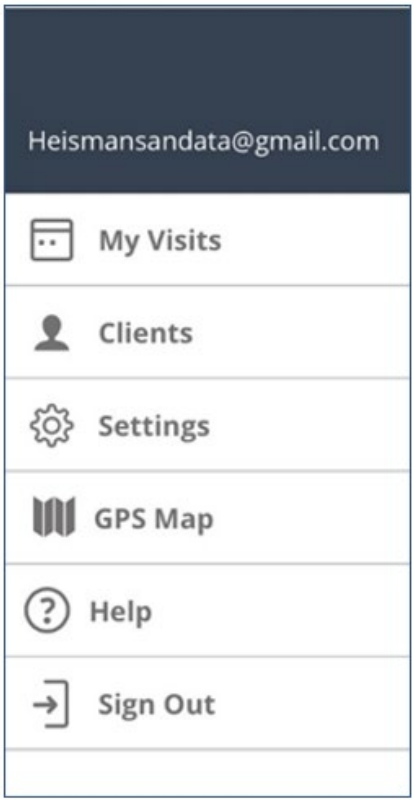
1 Tap here for the **menu**

2 Tap here to **log out**



Menu Bar Options

My Visits – Displays visits
Clients – Displays the client screen
Setting – Displays the settings screen
GPS – Displays a map with a pin at location
Help – Displays the help screen
Sign out – Logs out of the app and displays the login screen.



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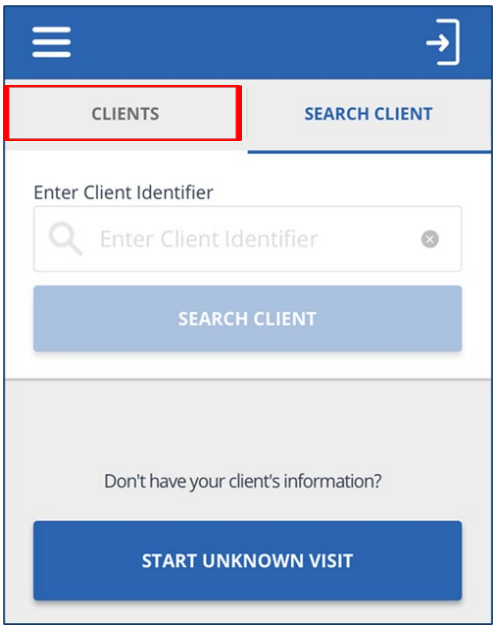
Starting a Visit

Upon logging in to Sandata Mobile Connect, you will be presented with a list of clients that you provide care to under the **Clients** tab.

If you need to start a visit for a client that ***is not*** yet linked to your account, you should follow the steps to **"Start an Unknown Visit" (page 9)**

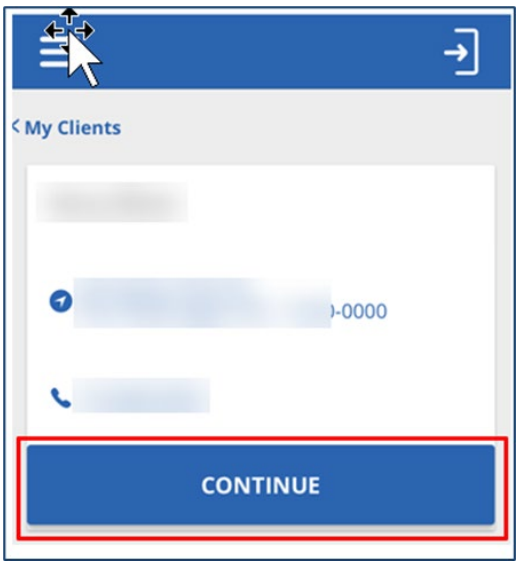


Start a visit from the **My Clients** screen

- Tap a client from the list to start a visit

  Check to make sure the right client displays

Tap **CONTINUE**



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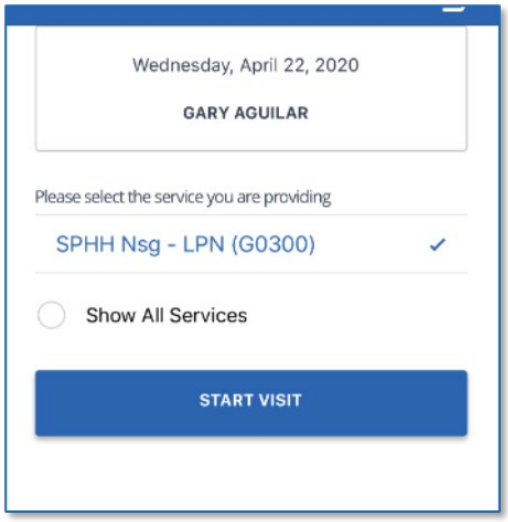
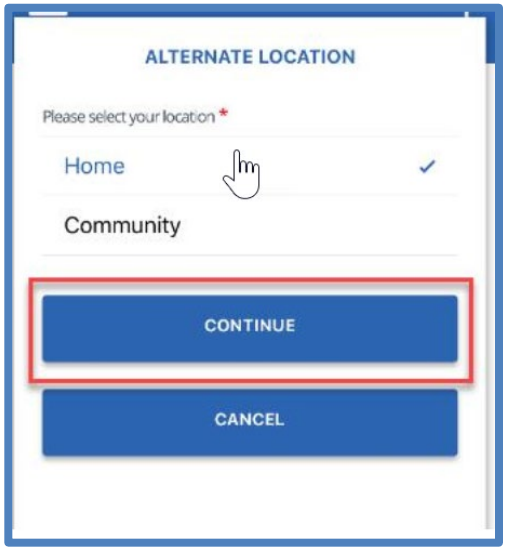
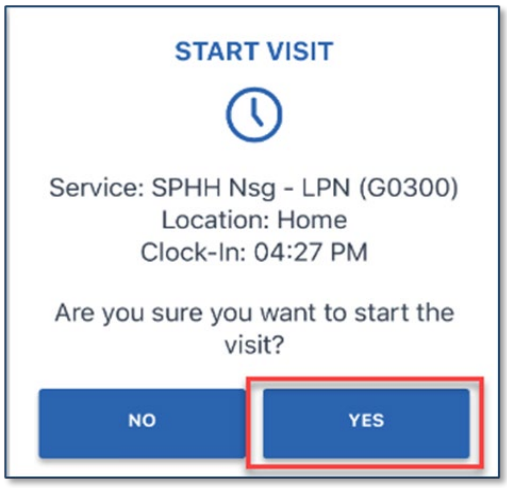
- Tap the *Service* to select
- Tap **START VISIT**



- Select a location
  NOTE: *The Location step may not be applicable to your program.*
- Tap **CONTINUE**



- Tap **YES** to start the visit



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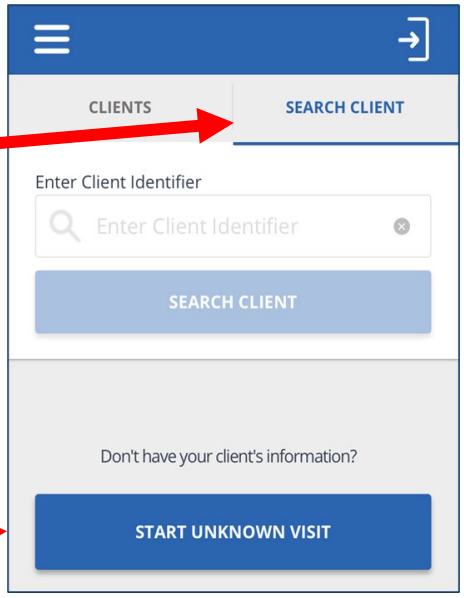
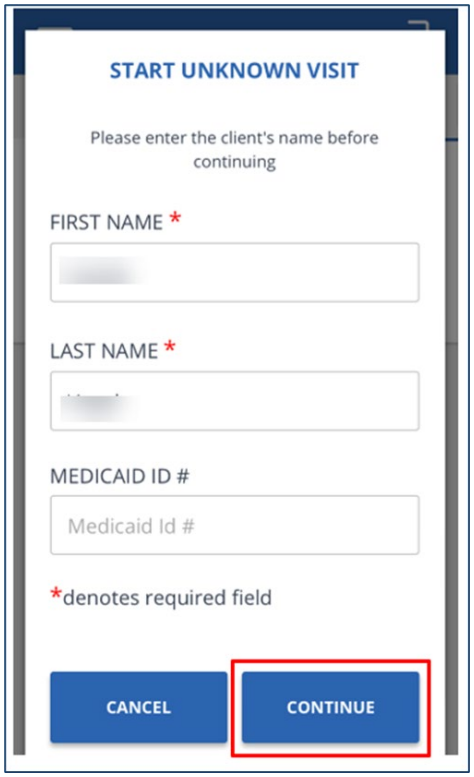
Starting an Unknown Visit

You may need to start a visit for a client whose name doesn't appear in the client's tab. This is known as **"STARTING AN UNKNOWN VISIT".**

The SEARCH CLIENT tab is disabled since the employee only has access to their assign client(s).



Tap **START UNKNOWN VISIT** to start a visit for a client whose name is not listed in the Clients tab.



Enter the clients **FIRST NAME** and **LAST NAME**

Asterisks * mean these are required fields.

- Tap **CONTINUE**

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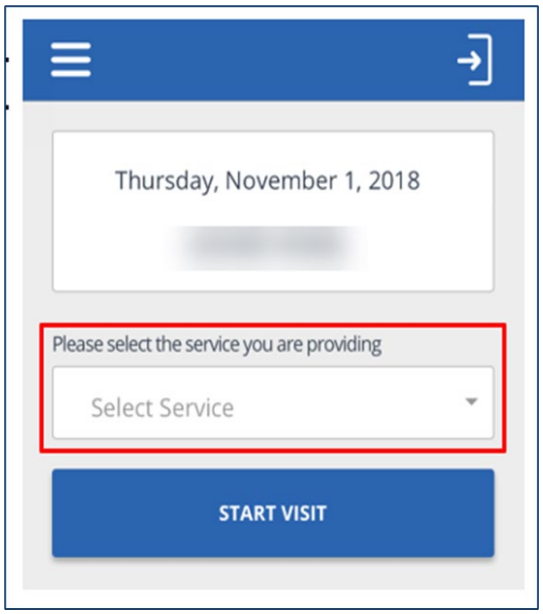
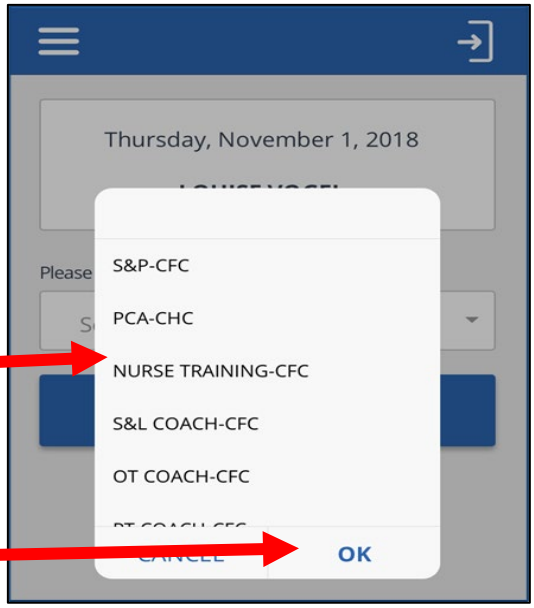
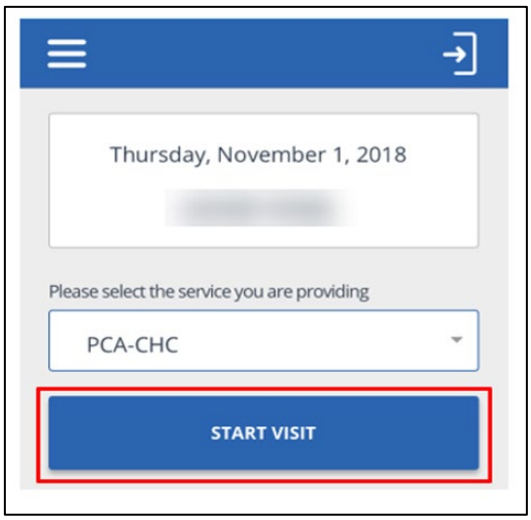
Tap the **Select Service** field and tap a **service** from the list.



There might only be *one* service to select.



- Tap **SERVICE**
- Tap **OK**



- Tap **START VISIT**

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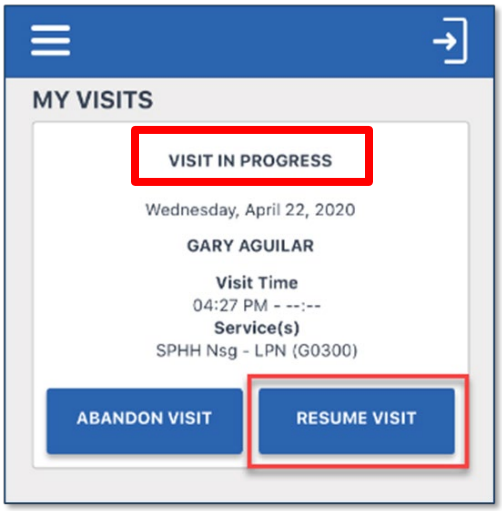
Completing a Visit

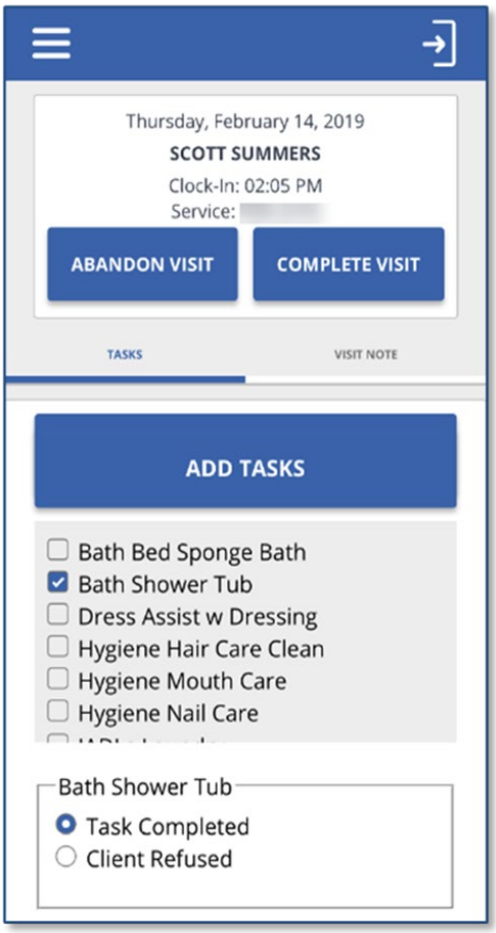
- Log into the SMC mobile app.
- If a visit is in progress, it will display.



- Tap **RESUME VISIT**

- Tap the task(s) performed from the task list.

  NOTE: *Tasks may not be applicable to your program.*



- Selected the task(s) performed and then tap either **"Task Completed"** or **"Client Refused".**

- Tap **ADD TASKS** to close the tasks list.

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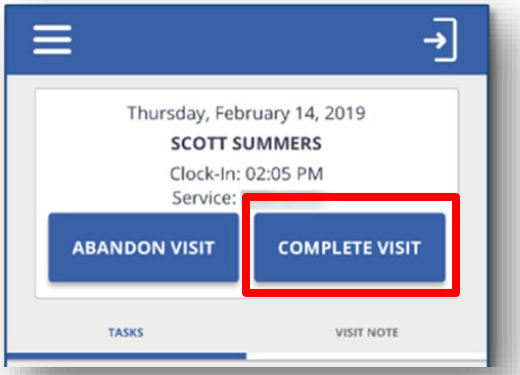
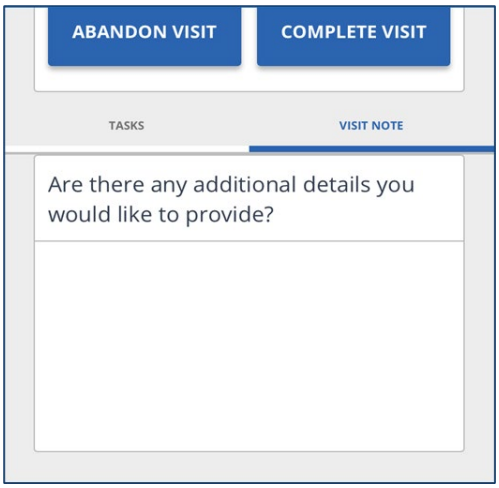
- Tap **COMPLETE VISIT**



- Tap the **VISIT NOTE** tab
- Using the keyboard on your mobile device, enter notes about the visit.

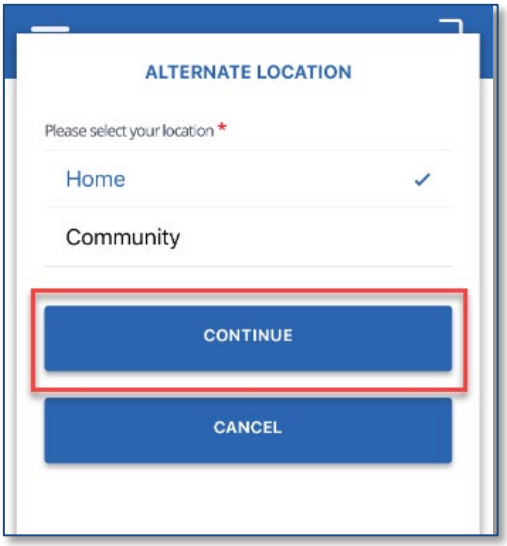


- Visit notes are optional and are not required. DO NOT use visit notes for any medical documented information.

- Select the **Location**

NOTE: *The Location step may not be applicable to your program.*

- Tap **CONTINUE**



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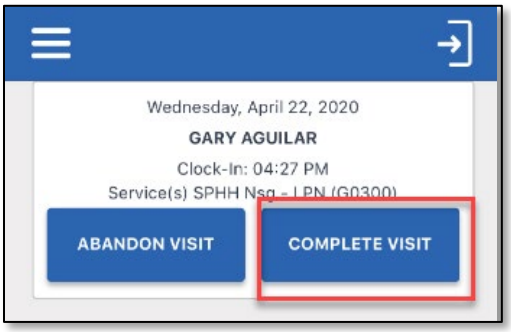
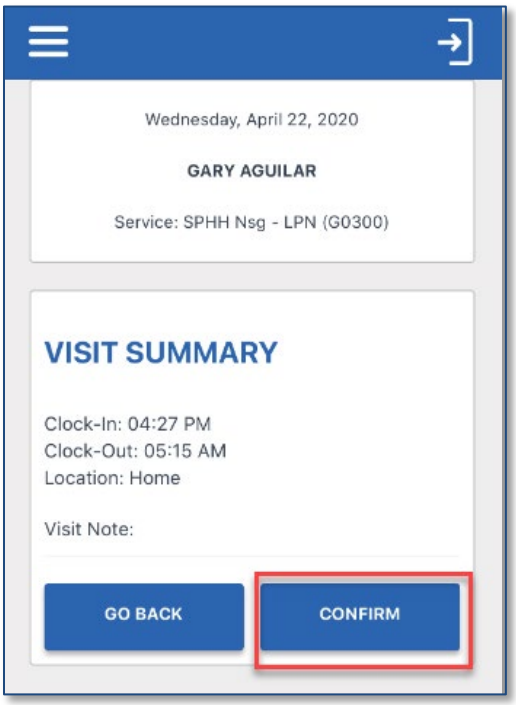
- Tap **COMPLETE VISIT**



- Tap **CONFIRM**



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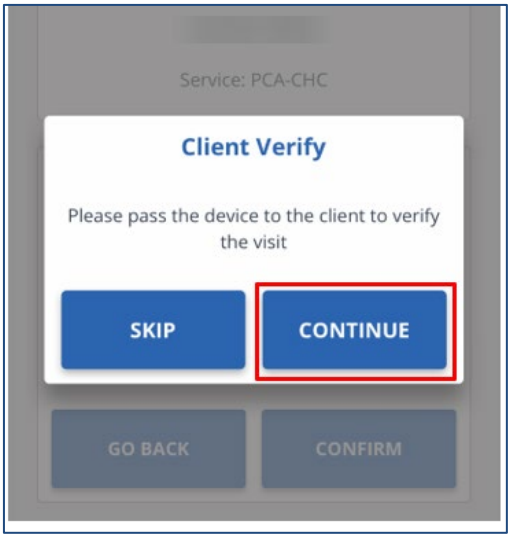
Client Verification

This option may or may not be required in your program.

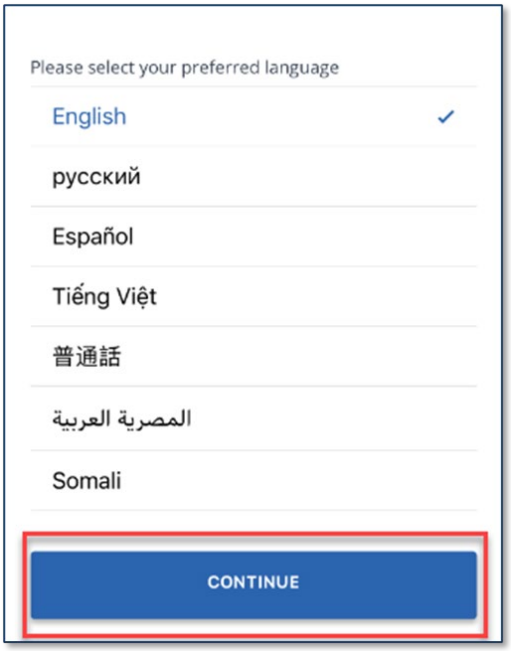
- Tap **CONTINUE** and pass the mobile device to the client to verify the visit.

  NOTE: *If the client is unable to verify*



- The client will tap the **language** field and select a language.

  NOTE: *English may be the only language in the list.*



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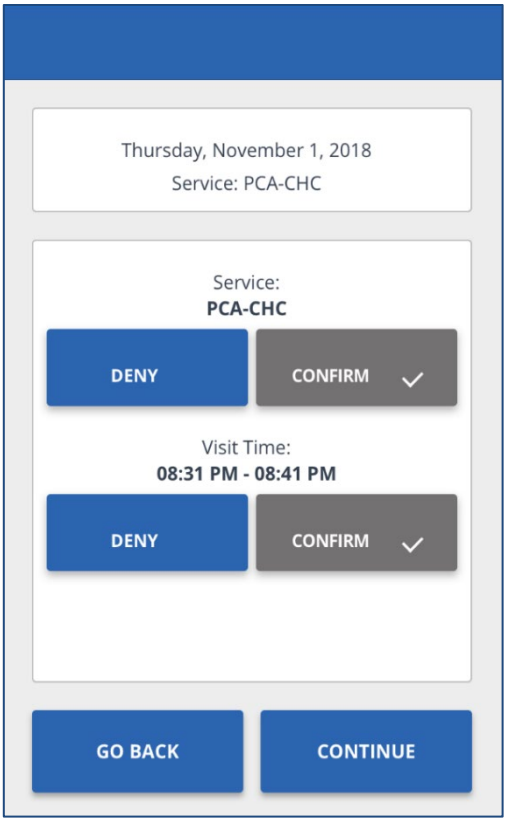
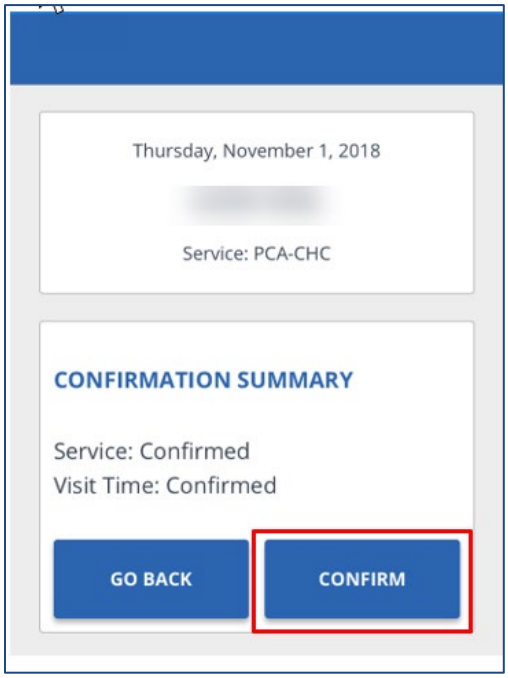
- Client taps **CONFIRM** or **DENY** to approve or reject **Service(s)** and **Visit Time.**
- If client taps **CONFIRM**, it means they agree the visit start and end times and service(s) were performed.
- If they tap **DENY**, it means they do not agree the visit start and end times or the service(s) that were performed.



  - Tap **CONTINUE**

NOTE: *If a client **DENIES** either (or both) **SERVICE(s)** or **VIST TIME**, you will still be able to complete the visit, however, the visit will show "Exception(s)" and need to be fixed in EVV.*



- Tap **CONFIRM**

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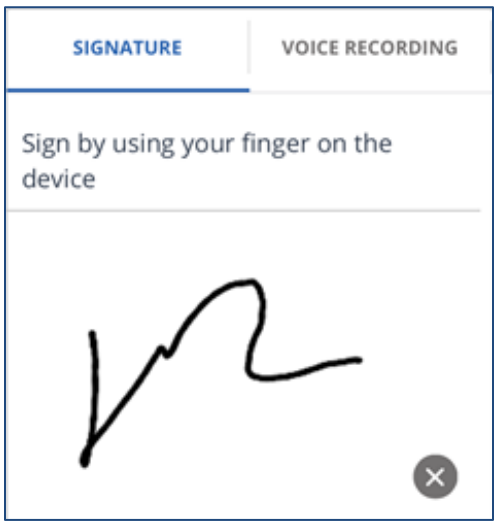
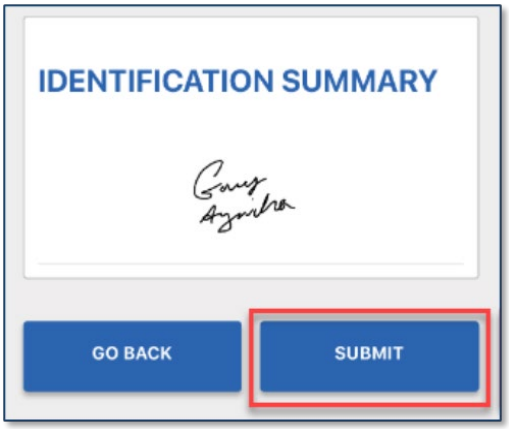
- Client will tap either **SIGNATURE** or **VOICE RECORDING.**
- Using **SIGNATURE**, they will sign the device using a finger and tap **CONTINUE**.
- Tap ⊗ to clear the signature field and sign again



- Tap **SUBMIT** (Signature Confirmation)



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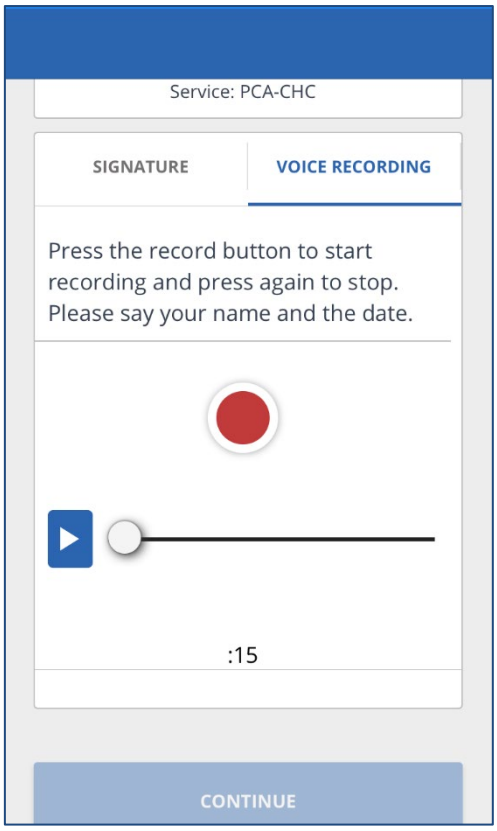
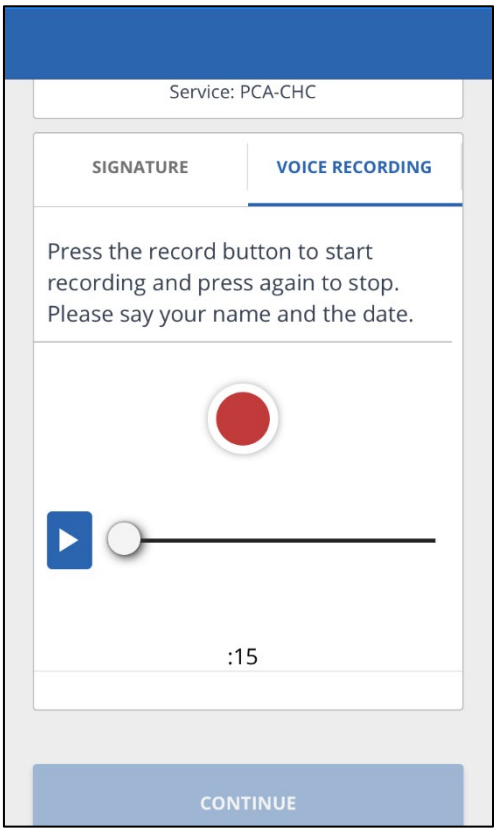
- If they tap **VOICE RECORDING**, tap the Record icon.
- If asked, tap **OK** to allow the mobile app. to access the microphone
- Tap the Record icon to stop the recording



- Voice recordings can be a maximum of 15 seconds
- Tap the Play icon to play the recorded audio



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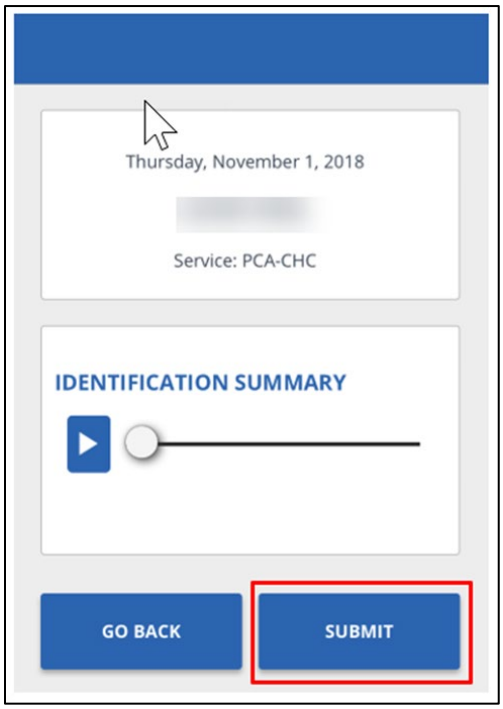
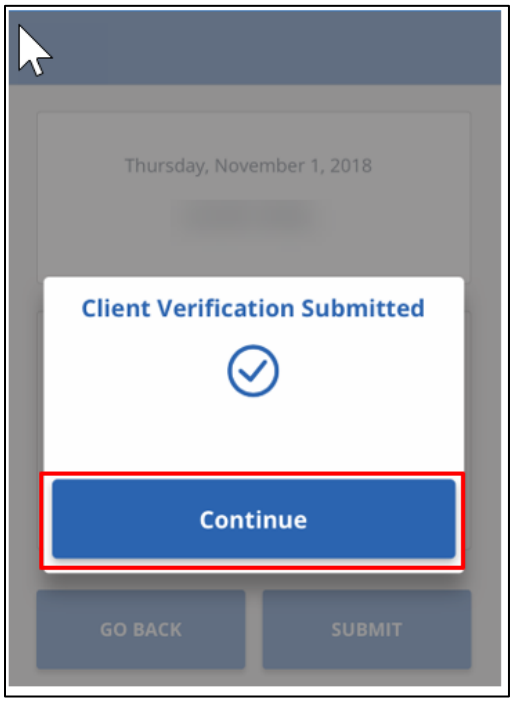
- Tap **SUBMIT** (Voice Confirmation)



- Tap **CONTINUE**



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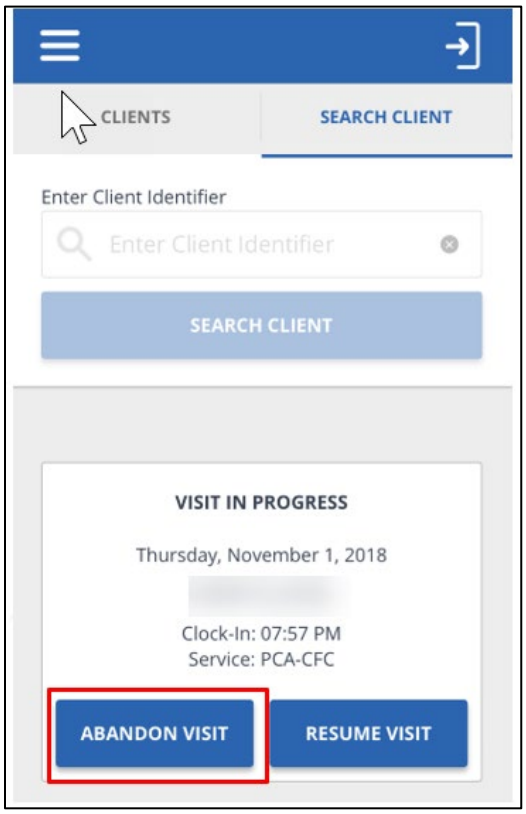
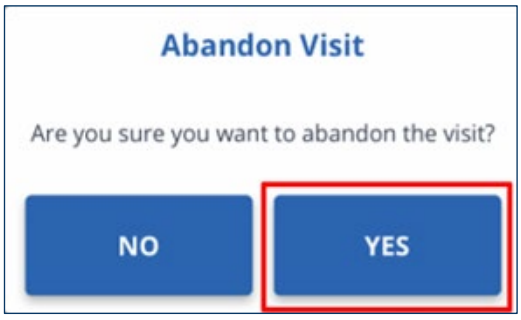
Abandoning a Visit

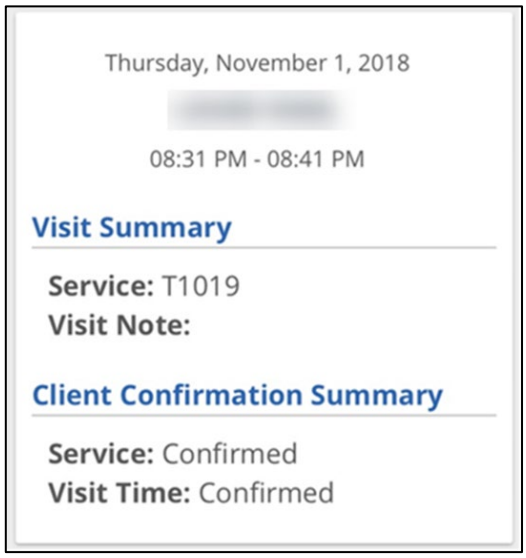
- There may be situations when you must cancel a visit that you started.
- For example, if you forgot or were unable to check out at the end of a visit and you need to start a new visit for another client.



- Tap **ABANDON VISIT**



- Tap **YES**



- View past visits from the **My Visits** screen
- Tap a visit to view details about the visit

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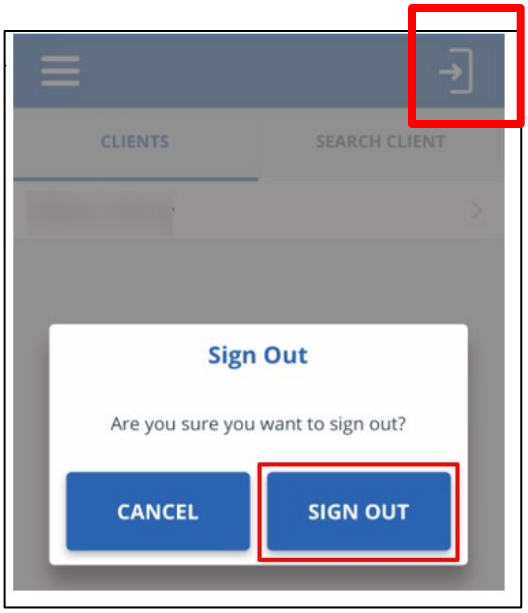
- Tap the sign out icon located at the top of the screen in the menu bar.

- A sign out pop-up displays.

- Tap **SIGN OUT** and you will be logged out of the mobile app.



NOTE: An Abandoned Visit will show as an exception and need to be fixed/acknowledged in EVV's Visit Maintenance.

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