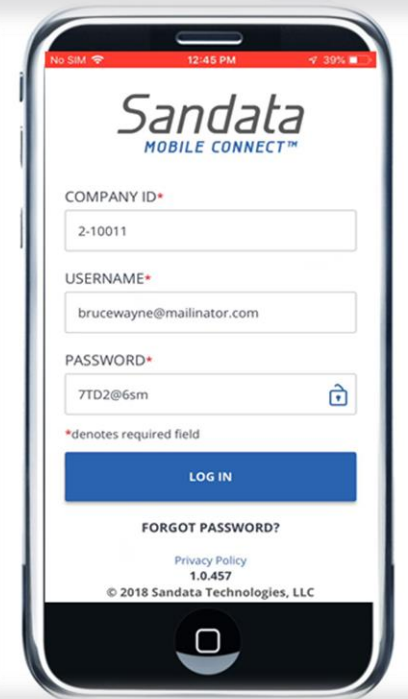


SANDATA MOBILE
CONNECT



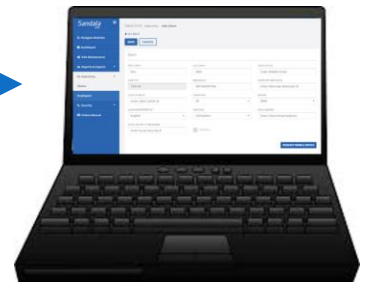
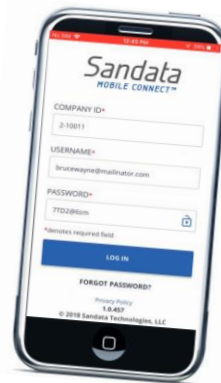
SMC

Sandata Mobile Connect (SMC)



What We Will Cover

- The Roles in EVV
- How it Works
- What is the Sandata Mobile Connect APP
- How to download the SMC App
- Setting up Credentials for the First Time
- Starting & Ending a Visit
- Adding Tasks to a Visit
- How to Verify a Visit
- Resetting Your Password
- How to Cancel a Visit
- How to View a Past visit



The Roles of EVV

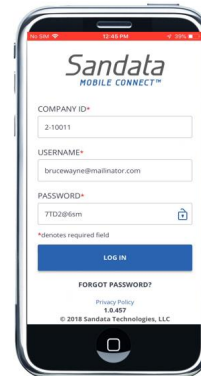
- **Employee** = The Employee **providing** care
 - Clocks in and out using either the client's phone or Sandata's Mobile App
- **Client** = The person **receiving** care
 - Will use the EVV website to edit and approve visits.
- **Designee** = A Client's representative
 - A person designated to handle the client's responsibilities when they are unable to do so.
- **Fiscal Intermediary** = vendor that provides wage and benefit processing and other activities

How it Works

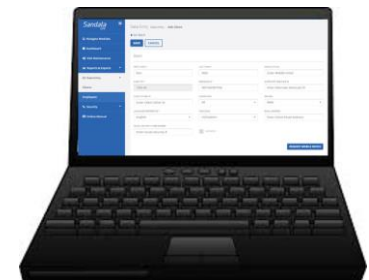
- The Employee arrives at the Client's home, opens the SMC APP and begins the Visit



- SMC uses either Wi-Fi or Data to transmit information of the visit.
- SMC does NOT store any information on the employee's phone.
- A visit can be started and/or ended by using the APP and/or the telephone method in combination.



- EVV is a web based system, nothing to install on your computer.
- Clients/employees can view, edit and make changes to visits so they can be verified and approved for payment.



What is the Sandata Mobile Connect app?

Known as S.M.C.

- The Sandata Mobile Connect app (SMC) is a computer program that runs on a mobile device such as a smartphone or tablet.
- The employee can download the SMC 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 telephone, known as the Telephony Visit Verification (TVV) method.

Downloading the SMC app.

- The employee will be given steps on how to download the Sandata mobile app to their mobile device.
- The employee will be given the Mobile App Guide with more in-depth details on what was covered during this course.
- The employee will have access to take the online Sandata Mobile Connect App course to learn how to install, setup and use the APP for visits.

For this Lesson

Mary is the Employee

John is the Employer

How to get and setup the Sandata Mobile App?

- The employee installs the mobile App on their smartphone or tablet.
- They tap the **SMC** icon to launch the mobile App.



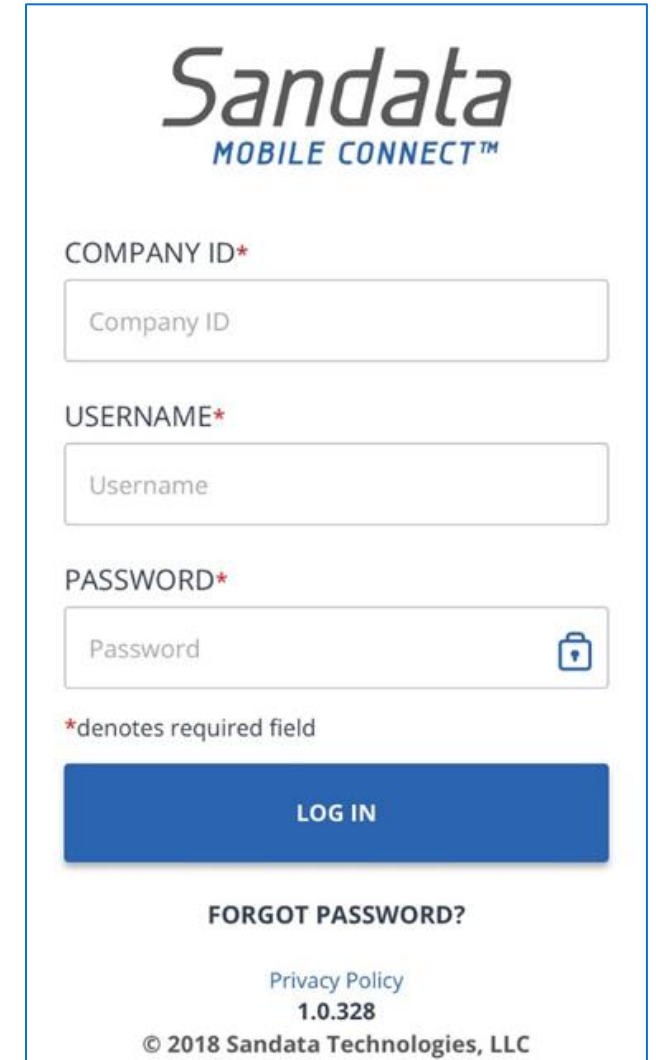
- Refer to the “**How to Download the Mobile App Guide**” to learn how to install the app on a mobile device.

Mary,
(employee)

“How do I log in
for the first
time?”

After opening the APP for the first time the employee will enter the following required information;

- **COMPANY ID**
- **USERNAME** – their email address
- **PASSWORD** – the temporary password they received in their email
- Tap **LOG IN**



The screenshot shows the Sandata Mobile Connect login interface. At the top is the Sandata logo with 'MOBILE CONNECT™' underneath. Below the logo are three input fields: 'COMPANY ID*' with a placeholder 'Company ID', 'USERNAME*' with a placeholder 'Username', and 'PASSWORD*' with a placeholder 'Password' and a lock icon. A red asterisk below the fields indicates that all fields are required. Below the input fields is a blue 'LOG IN' button. At the bottom, there is a link for 'FORGOT PASSWORD?', a 'Privacy Policy' link, the version number '1.0.328', and the copyright notice '© 2018 Sandata Technologies, LLC'.

Mary,
(employee)

“How do I setup
my security
questions?”

The employee will select and
answer three security
questions the *first time they
log in*

SECURITY SETUP

Please fill out the following security questions for your account

Please select a security question

Please enter your answer

Please select a security question

Please enter your answer

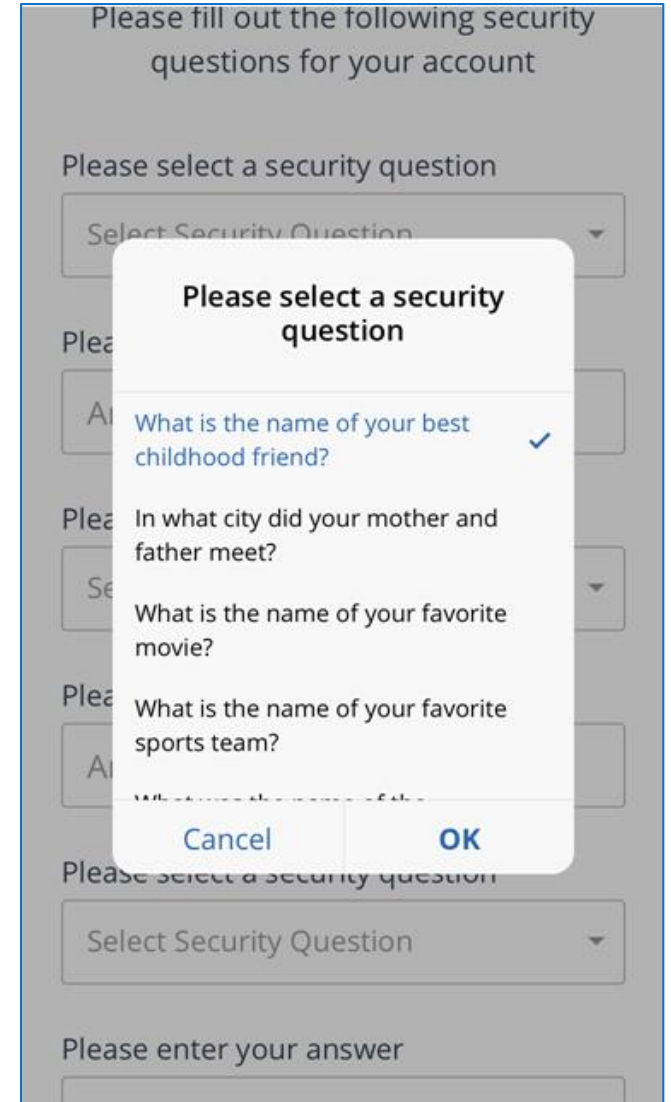
Please select a security question

Mary,
(employee)

“How do I setup
my security
questions?”

The employee answers should:

- Be easy to remember
- Not be easily guessed by someone else
- Not change over time
- Have the same format



The image shows a screenshot of a user interface for setting security questions. A dialog box titled "Please select a security question" is overlaid on a background form. The dialog box contains a list of four questions, with the first one selected and marked with a blue checkmark: "What is the name of your best childhood friend?". The other questions are "In what city did your mother and father meet?", "What is the name of your favorite movie?", and "What is the name of your favorite sports team?". At the bottom of the dialog box, there are "Cancel" and "OK" buttons. The background form is partially visible and contains text such as "Please fill out the following security questions for your account", "Please select a security question", and "Please enter your answer".

Mary,
(employee)

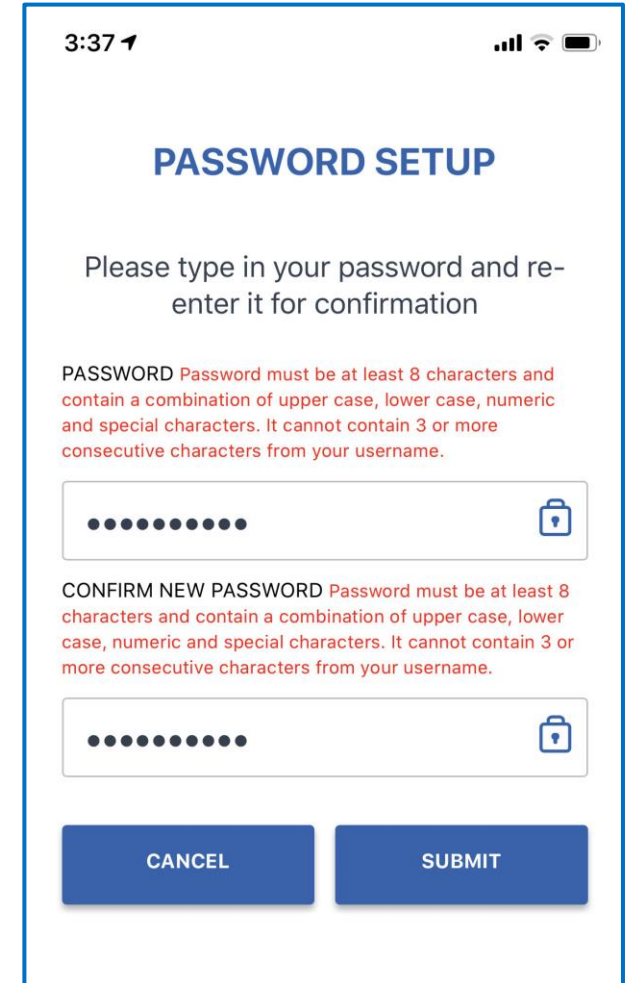
“How do I
change my
password?”

The employee will be asked to setup a new password.

Passwords MUST have:

- 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: **Password1!**



The screenshot shows a mobile application interface for password setup. At the top, the time is 3:37 and there are icons for signal strength, Wi-Fi, and battery. The title is "PASSWORD SETUP". Below the title, it says "Please type in your password and re-enter it for confirmation". There are two input fields, each with a lock icon on the right. The first field is labeled "PASSWORD" and the second is labeled "CONFIRM NEW PASSWORD". Both fields have red text below them stating: "Password must be at least 8 characters and contain a combination of upper case, lower case, numeric and special characters. It cannot contain 3 or more consecutive characters from your username." At the bottom, there are two buttons: "CANCEL" and "SUBMIT".

Mary,
(employee)

“How do I
change my
password?”

- Enter and re-enter a new password
- Tap **SUBMIT**

3:37

PASSWORD SETUP

Please type in your password and re-enter it for confirmation

PASSWORD Password must be at least 8 characters and contain a combination of upper case, lower case, numeric and special characters. It cannot contain 3 or more consecutive characters from your username.

.....

CONFIRM NEW PASSWORD Password must be at least 8 characters and contain a combination of upper case, lower case, numeric and special characters. It cannot contain 3 or more consecutive characters from your username.

.....

CANCEL SUBMIT

Mary,
(employee)

“I forgot my
password.
What do I do?”

- Enter the **Company ID**
- Enter the **Username**
- Tap **FORGOT PASSWORD?**

The screenshot shows the Sandata Mobile Connect login interface. At the top is the Sandata logo with the tagline 'MOBILE CONNECT™'. Below the logo are three input fields: 'COMPANY ID*' with a placeholder 'Company ID', 'USERNAME*' with a placeholder 'Username', and 'PASSWORD*' with a placeholder 'Password' and a lock icon. A note below the fields states '*denotes required field'. A blue 'LOG IN' button is positioned below the fields. At the bottom of the form is a link for 'FORGOT PASSWORD?'. The footer contains 'Privacy Policy 1.0.328' and '© 2018 Sandata Technologies, LLC'. Three red arrows point from the text in the adjacent list to the 'COMPANY ID*' field, the 'USERNAME*' field, and the 'FORGOT PASSWORD?' link.

Mary,
(employee)

“I forgot my
password.
What do I do?”

- An employee can reset their password by answering their security questions or by email.
- If they choose to reset their password by email, then follow the steps on slide 9 to create a new password.



Mary,
(employee)

“I forgot my
password.
What do I do?”

If the employee chooses to reset their password using the security questions, they'll need to answer the security questions that they selected the first time during the setup process.

Tap **CONTINUE**

A screenshot of a mobile application interface for password reset. The screen displays two security questions. The first question is "What was the name of the company you had your first job?" with the answer "Vitro" entered in the text field. The second question is "What is your favorite food?" with the answer "Sashimi" entered in the text field. Below the text fields are two buttons: "CANCEL" and "CONTINUE". The "CONTINUE" button is highlighted with a red rectangular box. Two red arrows point from the left towards the first and second text fields. At the bottom of the screen, a keyboard is visible with the word "Sashimi" suggested in the search bar.

Mary,
(employee)


“I forgot my
password.
What do I do?”

- Enter a **new password** →
- Re-enter the **new password** →
- Tap **RESET** →


RESET PASSWORD

Enter your new password and confirm it

NEW PASSWORD

Password 

CONFIRM NEW PASSWORD

Confirm Password 

RESET

Mary,
(employee)

“How do I use
the menu bar?”

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

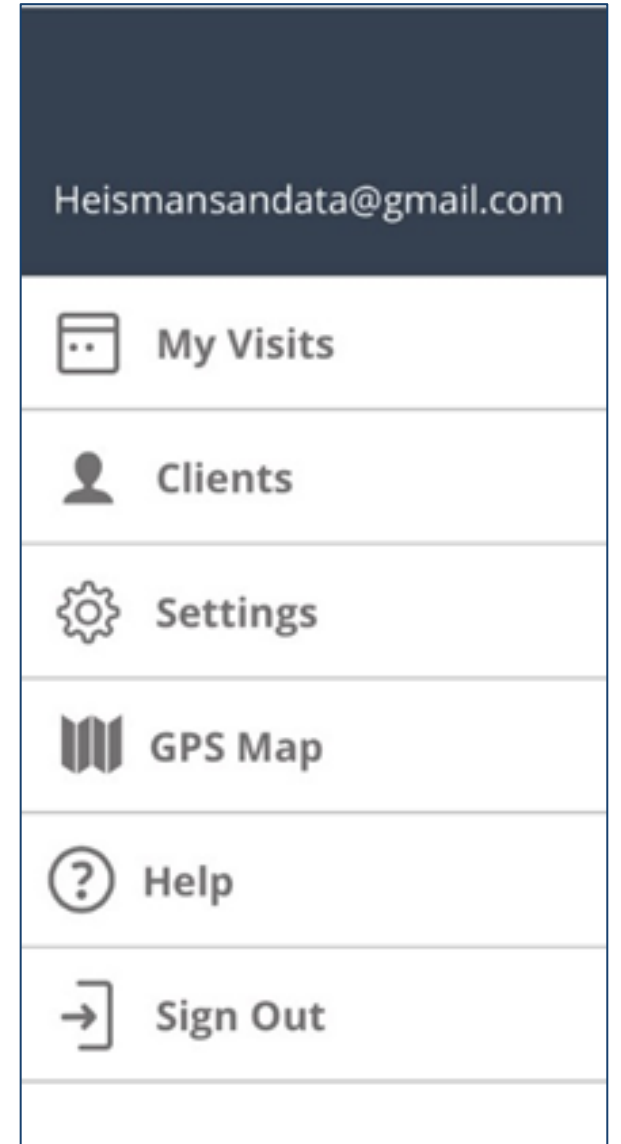
- **1** Tap here for the **menu**
- **2** Tap here to **log out**



Mary,
(employee)

“How do I use
the menu bar?”

- **My Visits** – Displays visits
- **Clients** – Displays the screen
- **Settings** – Displays the **Settings** screen
- **GPS Map** – Displays a map with a pin at your location
- **Help** - Displays the **Help** screen
- **Sign Out** – Logs out of the mobile app and displays the **Log In** screen

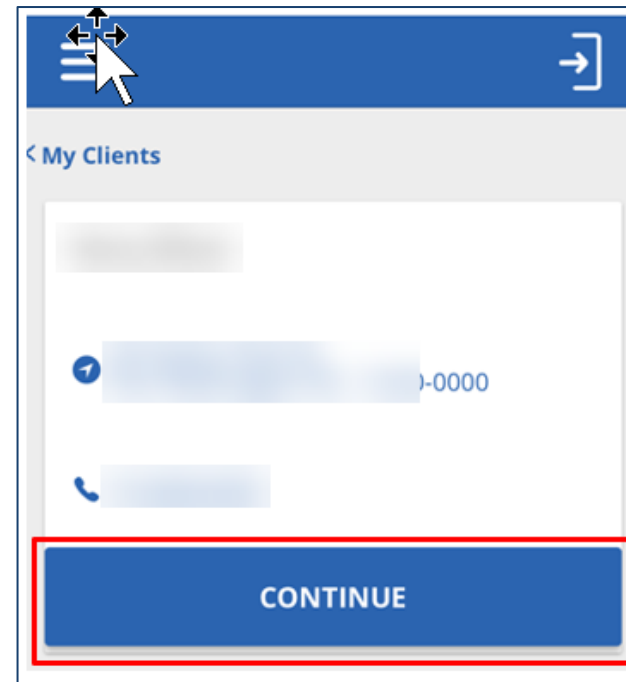


Mary,
(employee)

“How do I start
a visit?”

An employee can 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**



Mary,
(employee)

“How do I start
a visit?”

- Tap the *Service* to select
- Tap **START VISIT**
- Select a location
- Tap **CONTINUE**

Wednesday, April 22, 2020

GARY AGUILAR

Please select the service you are providing

SPHH Nsg - LPN (G0300) ✓

Show All Services

START VISIT

Wednesday, April 22, 2020

GARY AGUILAR

Please select the service you are providing

SPHH Nsg - LPN (G0300) ✓

Show All Services


START VISIT

Mary,
(employee)

“How do I start
a visit?”

- Tap **YES** to start the visit

START VISIT



Service: SPHH Nsg - LPN (G0300)
Location: Home
Clock-In: 04:27 PM

Are you sure you want to start the visit?

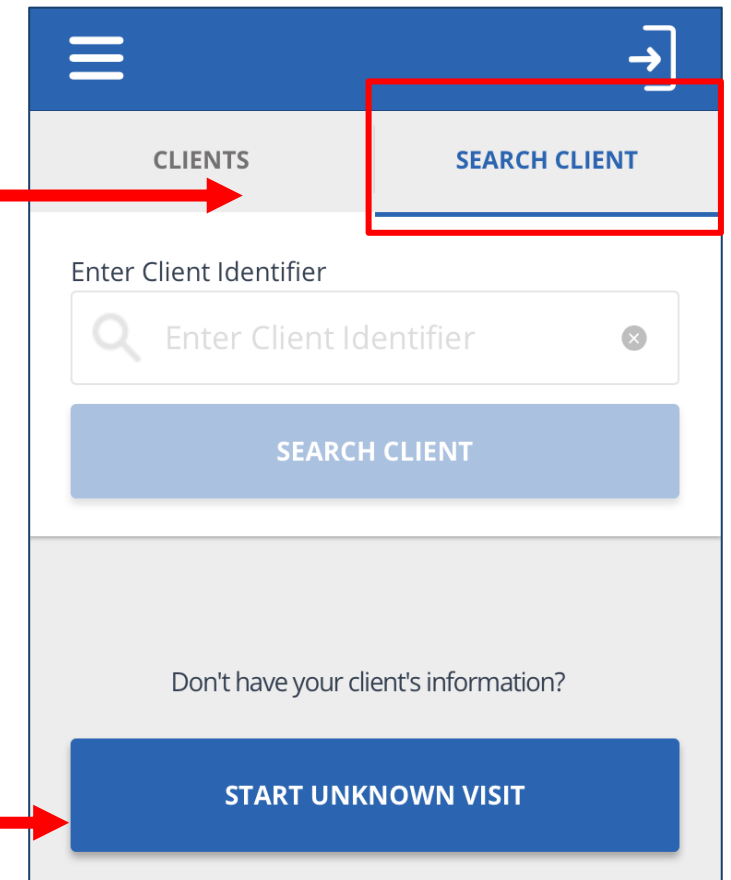
An employee may need to start a visit for a client who's name doesn't appear in the client's tab. This is known as **"STARTING AN UNKNOWN VISIT"**

Mary,
(employee)

"John (client) is not in the client list.
What do I do?"

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 who's name is not listed in the Clients tab.



Mary,
(employee)

“John (client) is
not in the
client list.
What do I do?”

- Enter the clients **FIRST NAME** and **LAST NAME**
- Asterisks * mean these are required fields
- Tap **CONTINUE**

START UNKNOWN VISIT

Please enter the client's name before continuing

FIRST NAME *

LAST NAME *

MEDICAID ID #

Medicaid Id #

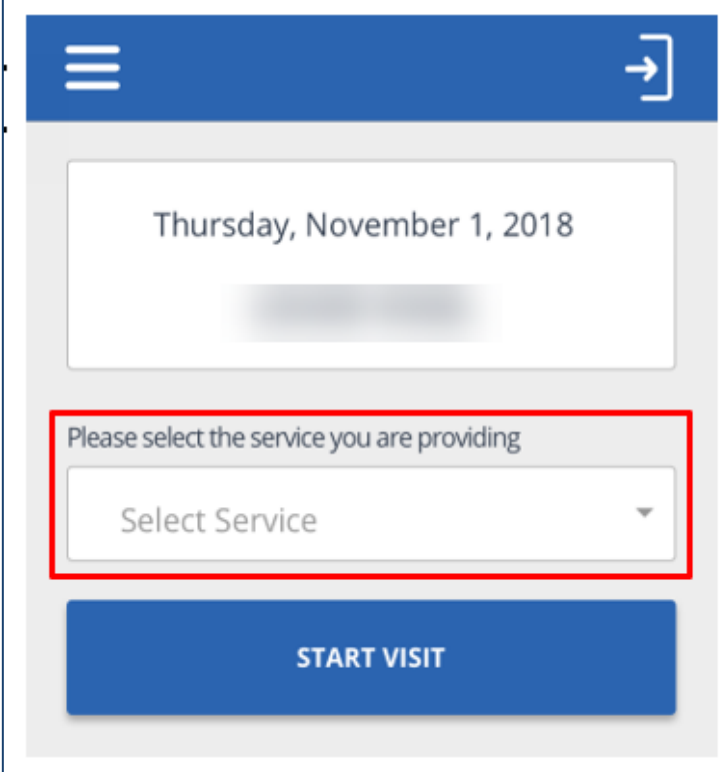
*denotes required field

CANCEL CONTINUE

Mary,
(employee)

“John (client) is
not in the
client list.
What do I do?”

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



The screenshot shows a mobile application interface with a blue header bar containing a menu icon on the left and a back arrow on the right. Below the header, there is a date field displaying "Thursday, November 1, 2018". Underneath the date field is a blurred area. A red rectangular box highlights a dropdown menu with the text "Please select the service you are providing" and a "Select Service" field with a downward arrow. At the bottom of the form is a blue button labeled "START VISIT".

Mary,
(employee)

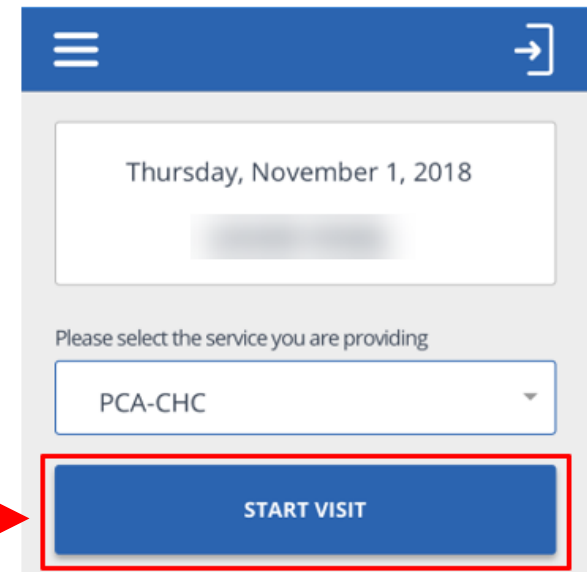
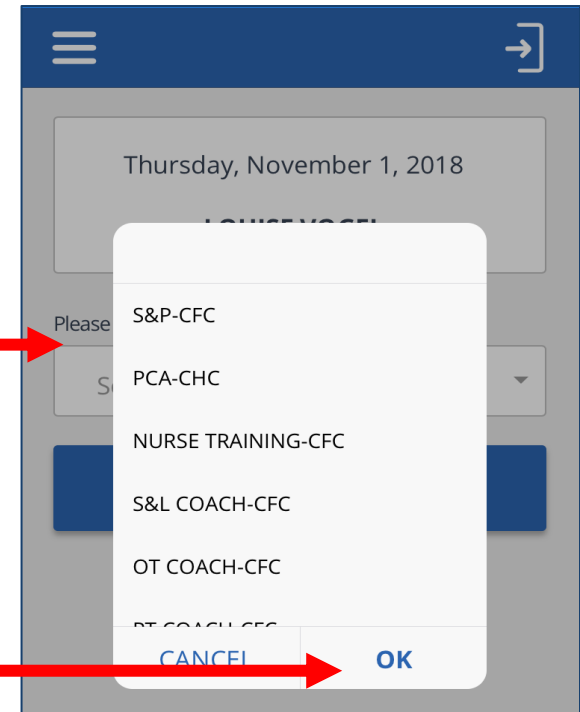
“John (client) is
not in the
client list.
What do I do?”

There might only be *one*
service to select

- Tap **service**

- Tap **OK**

- Tap **START VISIT**




Mary,
(employee)

“John (client) is
not in the
client list.
What do I do?”

- Tap **YES** to start the visit

START VISIT



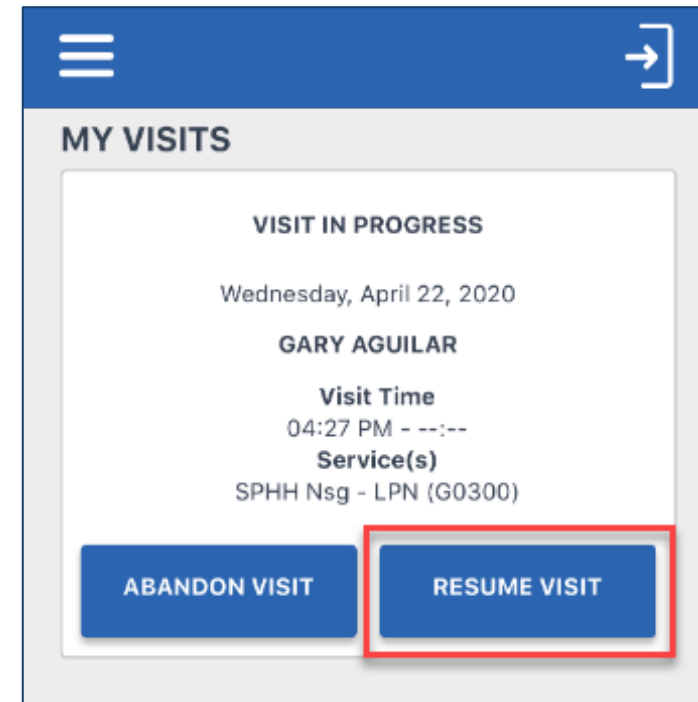
Service: SPHH Nsg - LPN (G0300)
Location: Home
Clock-In: 04:27 PM

Are you sure you want to start the
visit?

Mary,
(employee)

“How do I
complete a
visit?”

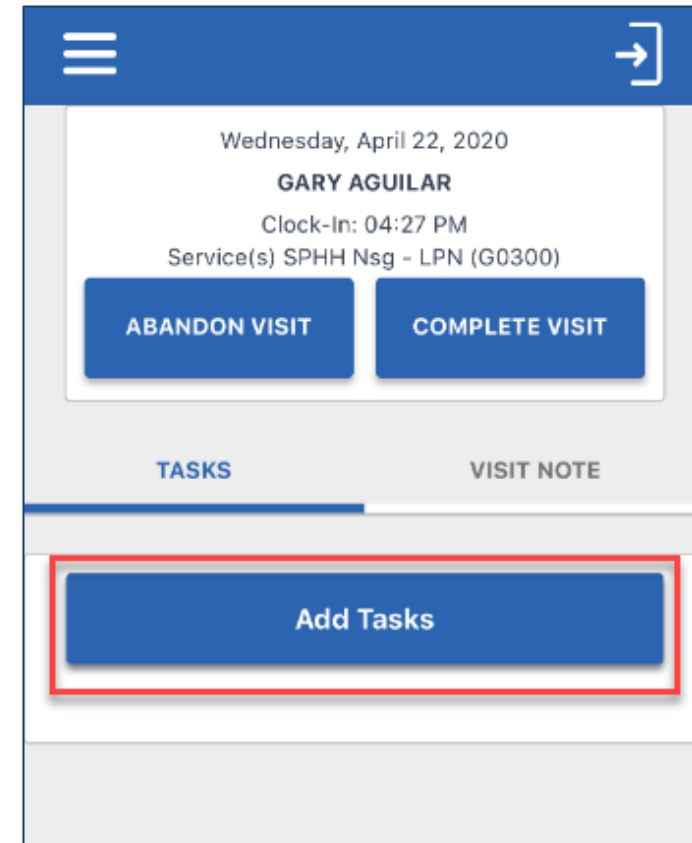
- Log into the mobile app
- If a visit is in progress, it will display
- Tap **RESUME VISIT**



Mary,
(employee)

“How do I
complete a
visit?”

- Tap **COMPLETE VISIT**
 - An employee may be required to add at least one task



- Tap **ADD TASKS**

Mary,
(employee)

“How do I
complete a
visit?”

- Tap the task(s) performed from the task list
- Scroll to find the task(s) that was performed
- Selected the task(s) performed and tap **ADD TASKS** to close the tasks list

The screenshot shows a mobile application interface for a visit completion screen. At the top, it displays the date "Wednesday, April 22, 2020", the employee name "GARY AGUILAR", the clock-in time "Clock-In: 04:27 PM", and the service "Service(s) SPHH Nsg - LPN (G0300)". Below this information are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". The screen is divided into two tabs: "TASKS" (which is selected) and "VISIT NOTE". Under the "TASKS" tab, there is a blue button labeled "Add Tasks". Below this button is a list of tasks with checkboxes: "Alternate Location", "Assist Tube Feeding", "Assist W/ Ambulation", "Bathing", "Eating" (checked), "Grooming" (checked), "Mobility Ambulation", and "Reinforce Diet". Below the "Eating" and "Grooming" tasks, there are two sections, each with a radio button labeled "Task Completed": "Eating" and "Grooming".

Mary,
(employee)

“How do I
complete a
visit?”

- **Task Completed** means the task(s) were performed during the visit

Wednesday, April 22, 2020
GARY AGUILAR
Clock-In: 04:27 PM
Service(s) SPHH Nsg - LPN (G0300)

ABANDON VISIT COMPLETE VISIT

TASKS VISIT NOTE

Add Tasks

- Alternate Location
- Assist Tube Feeding
- Assist W/ Ambulation
- Bathing
- Eating
- Grooming
- Mobility Ambulation
- Reinforce Diet

Eating
 Task Completed

Grooming
 Task Completed

Mary,
(employee)

“How do I
complete a
visit?”

- Tap **COMPLETE VISIT**

The screenshot shows a mobile application interface for managing a visit. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. Below the header, the date "Friday, November 2, 2018" is displayed. Underneath the date, the text "Clock-In: 07:48 AM" and "Service: PCA-CFC" is shown. Two blue buttons are visible: "ABANDON VISIT" and "COMPLETE VISIT". The "COMPLETE VISIT" button is highlighted with a red rectangular border. Below the buttons, there are two tabs: "TASKS" and "VISIT NOTE". The "TASKS" tab is currently selected. Under the "TASKS" tab, there is a blue button labeled "ADD TASKS". Below this button is a list of tasks with checkboxes: "Accompany on walks", "Accompany to medical appointment", "Accompany to other Location", "Assist tube feeding", and "Assist with ambulation". At the bottom of the list, the text "Diet monitoring meal preparation" is visible.

Mary,
(employee)

“How do I
complete a
visit?”

- To add visit notes, tap the **VISIT NOTE** tab
- Using the keyboard on your mobile device, enter notes about the visit

ABANDON VISIT COMPLETE VISIT

TASKS VISIT NOTE

Are there any additional details you would like to provide?

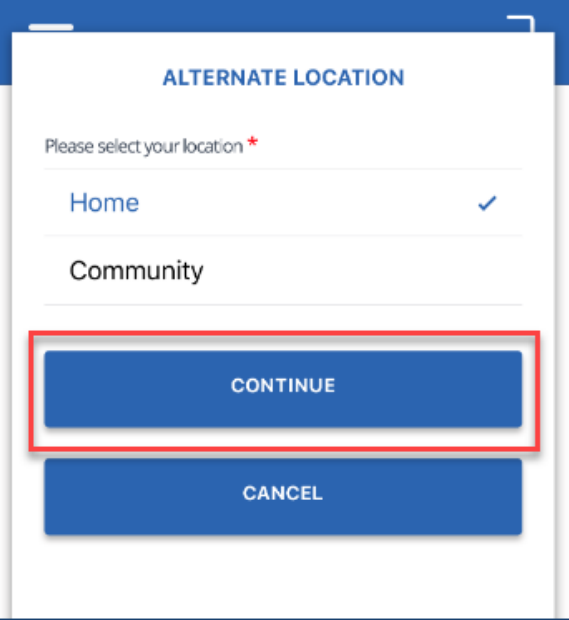
The client fell today. |

Q W E R T Y U I O P
A S D F G H J K L
↑ Z X C V B N M ↵
123 😊 🎤 space return

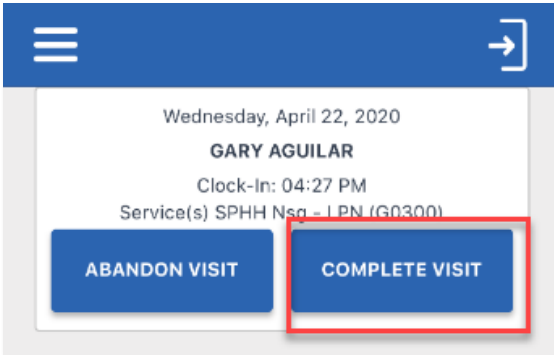
Mary,
(employee)

“How do I
complete a
visit?”

- Select the location
- Tap **CONTINUE**
- Tap **COMPLETE VISIT**



The screenshot shows a mobile application interface titled "ALTERNATE LOCATION". Below the title, there is a prompt "Please select your location *". Two options are listed: "Home" with a blue checkmark to its right, and "Community". At the bottom of the screen, there are two blue buttons: "CONTINUE" and "CANCEL". The "CONTINUE" button is highlighted with a red rectangular border.

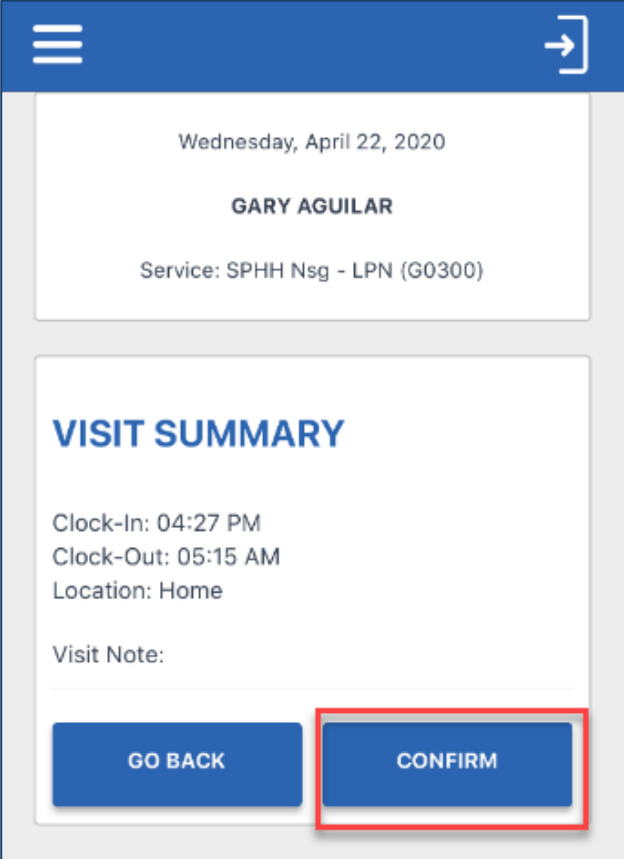


The screenshot shows a mobile application interface displaying visit details. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. The main content area shows the date "Wednesday, April 22, 2020", the name "GARY AGUILAR", the clock-in time "Clock-In: 04:27 PM", and the service "Service(s) SPHH Nsg - LPN (G0300)". At the bottom, there are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". The "COMPLETE VISIT" button is highlighted with a red rectangular border.

Mary,
(employee)

“How do I
complete a
visit?”

- Tap **CONFIRM**



Wednesday, April 22, 2020

GARY AGUILAR

Service: SPHH Nsg - LPN (G0300)

VISIT SUMMARY

Clock-In: 04:27 PM
Clock-Out: 05:15 AM
Location: Home

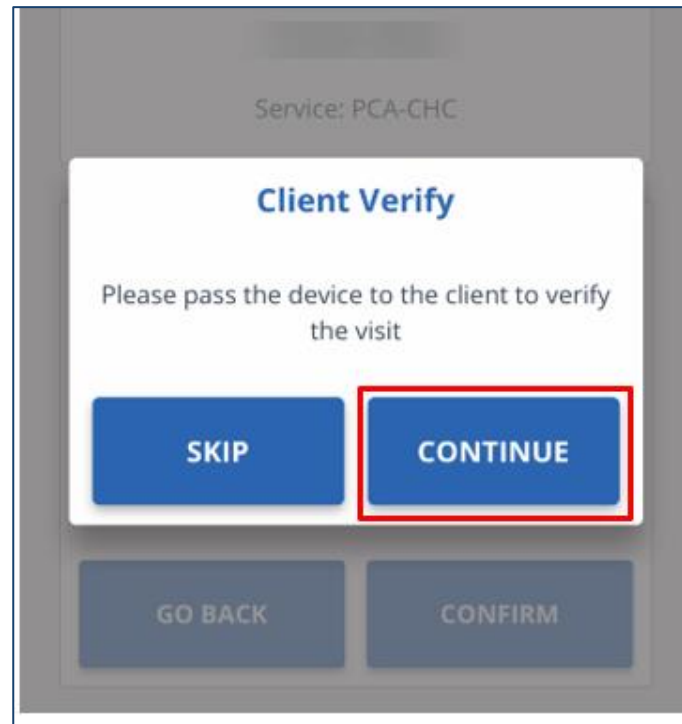
Visit Note:

GO BACK CONFIRM

Mary,
(employee)

“How do I
complete a
visit?”

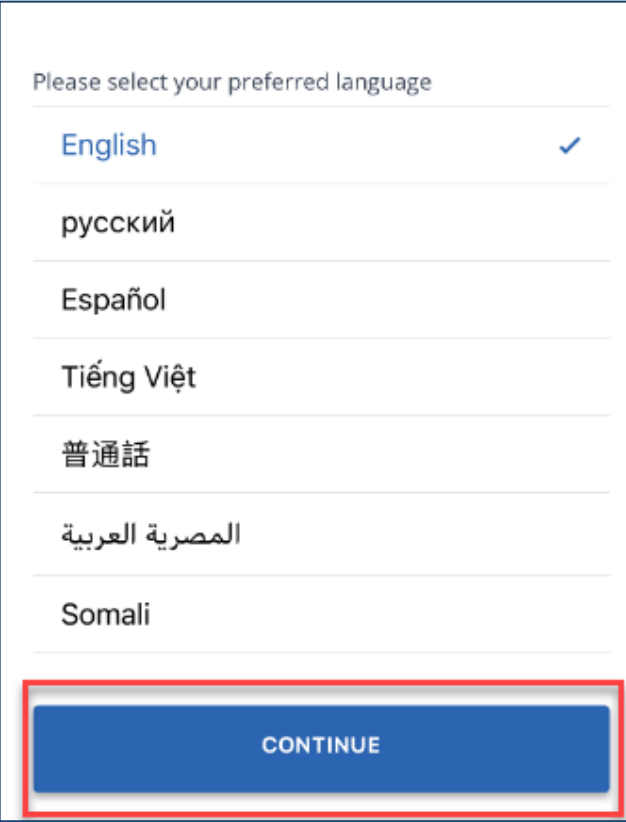
- Tap **CONTINUE** and pass the mobile device to the client to verify the visit



John,
(client)

“How do I
verify a visit?”

- Tap the **language** field and select a language
English may be the only language in the list



Please select your preferred language

English	✓
русский	
Español	
Tiếng Việt	
普通話	
المصرية العربية	
Somali	

CONTINUE

John,
(client)

“How do I
verify a visit?”

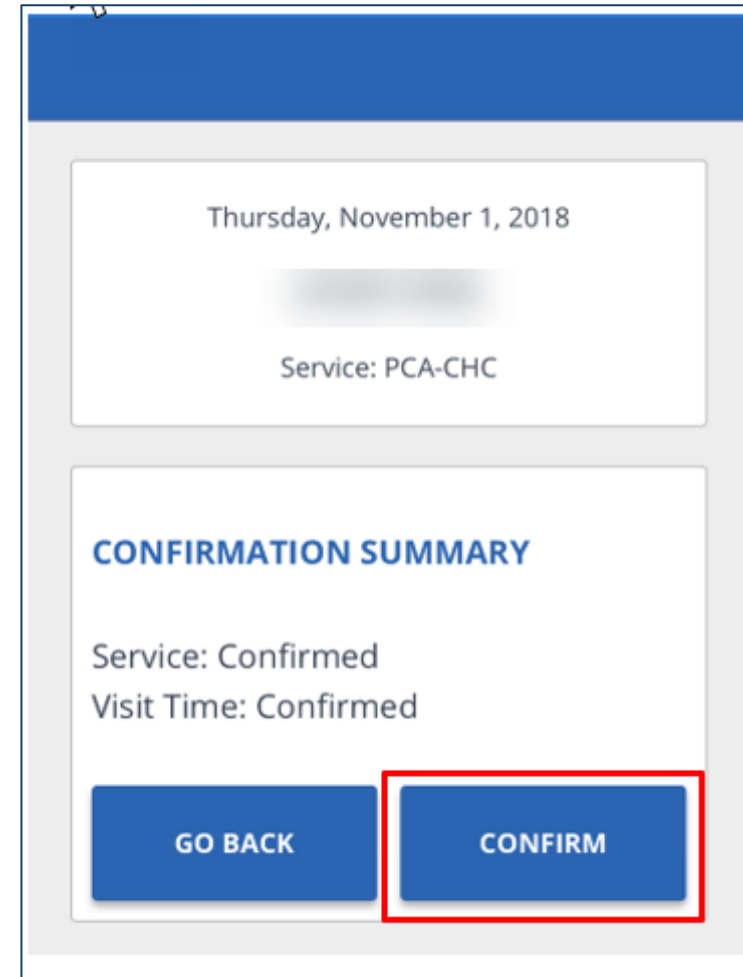
- Tap **CONFIRM** or **DENY** to approve or reject **Service** and **Visit Time**
- If employer taps **CONFIRM**, it means they agree the visit start and end times and service(s) were performed
- If they tap **DENY**, it means they do not agree the visit start and end times or the service(s) were performed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

The screenshot shows a mobile application interface for verifying a visit. At the top, there is a blue header bar. Below it, a white box contains the date "Thursday, November 1, 2018" and the service name "Service: PCA-CHC". The main content area is divided into two sections. The first section is titled "Service: PCA-CHC" and contains two buttons: a blue "DENY" button and a grey "CONFIRM" button with a checkmark. The second section is titled "Visit Time: 08:31 PM - 08:41 PM" and also contains two buttons: a blue "DENY" button and a grey "CONFIRM" button with a checkmark. At the bottom of the screen, there are two blue buttons: "GO BACK" and "CONTINUE".

John,
(client)

“How do I
verify a visit?”

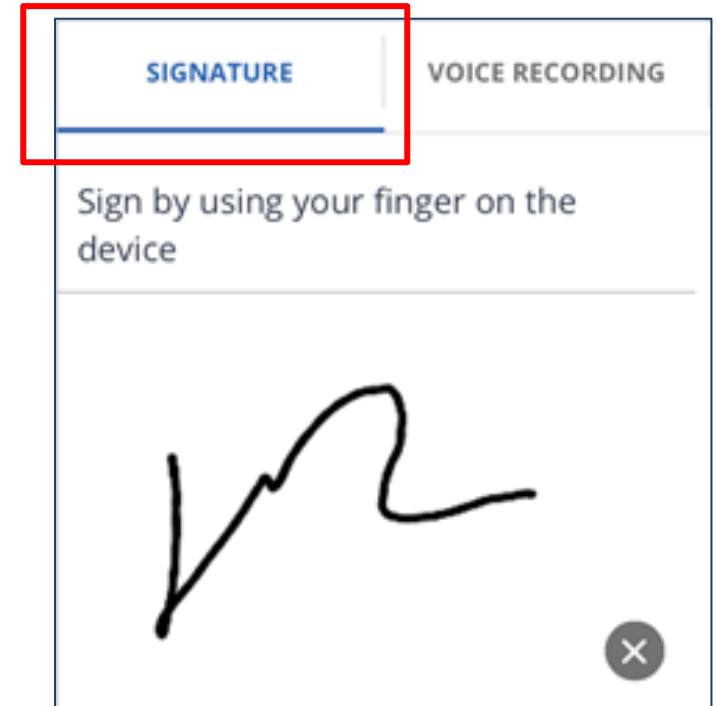
- Tap **CONFIRM**



John,
(client)



“How do I
verify a visit?”

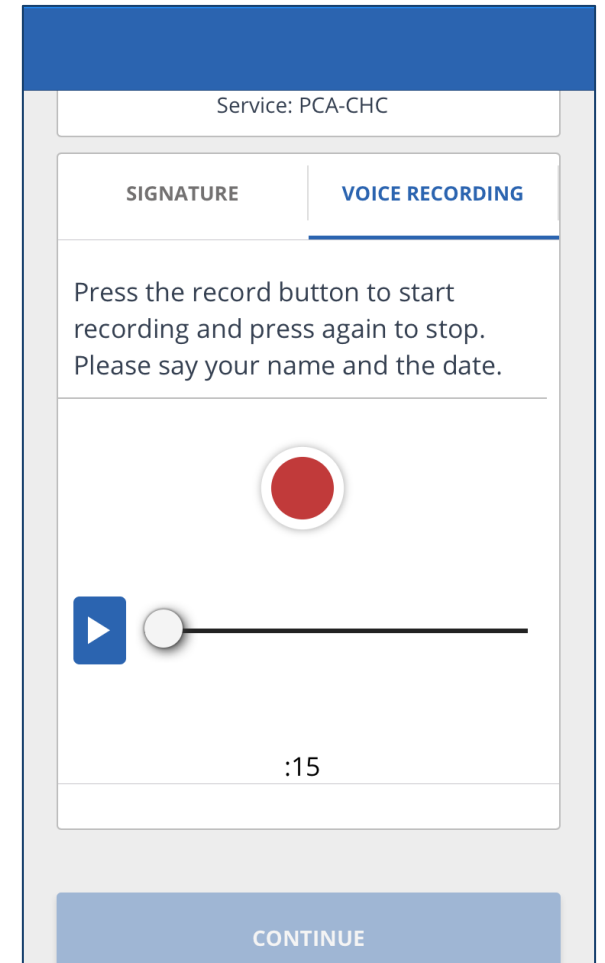
- Tap either **SIGNATURE** or **VOICE RECORDING**
- If the employee taps **SIGNATURE**, they will sign the device using a finger and tap **CONTINUE**
- Tap **✕** to clear the signature field and sign again



John,
(client)


“How do I
verify a visit?”

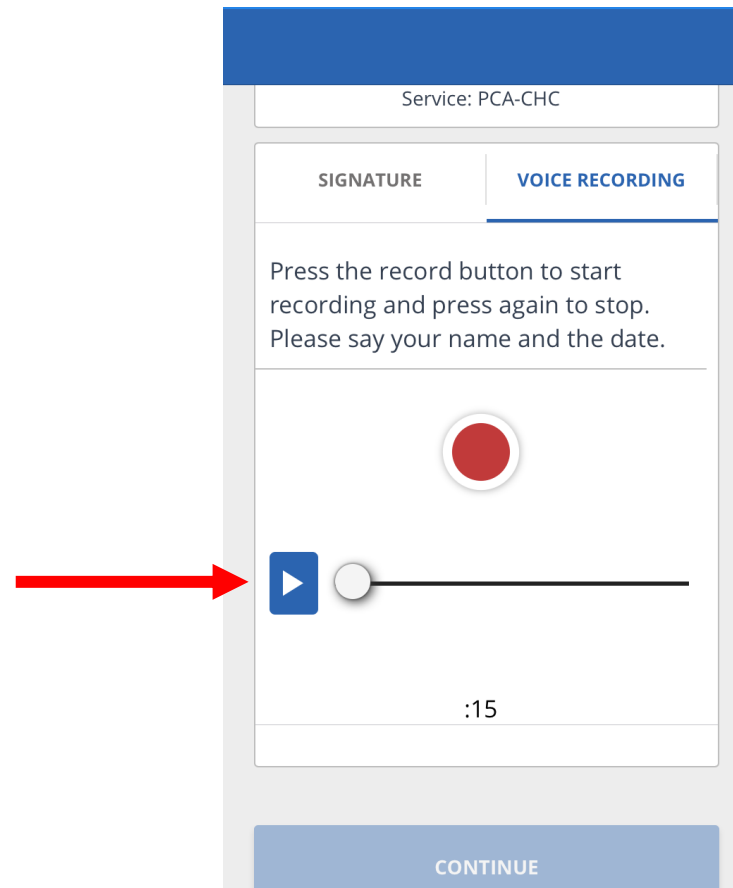
- If they tap **VOICE RECORDING**, tap the Record icon 
- Tap **OK** to allow the mobile app to access the microphone
- Tap the Record  icon to stop the recording



John,
(client)

“How do I
verify a visit?”

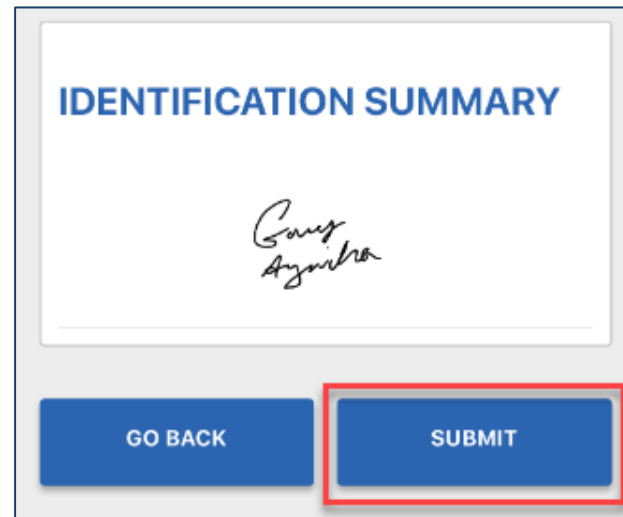
- Voice recordings can be a maximum of 15 seconds
- Tap the Play  icon to play the recorded audio



John,
(client)

“How do I
verify a visit?”

- Tap **SUBMIT** (Signature Confirmation)



John,
(client)

“How do I
verify a visit?”

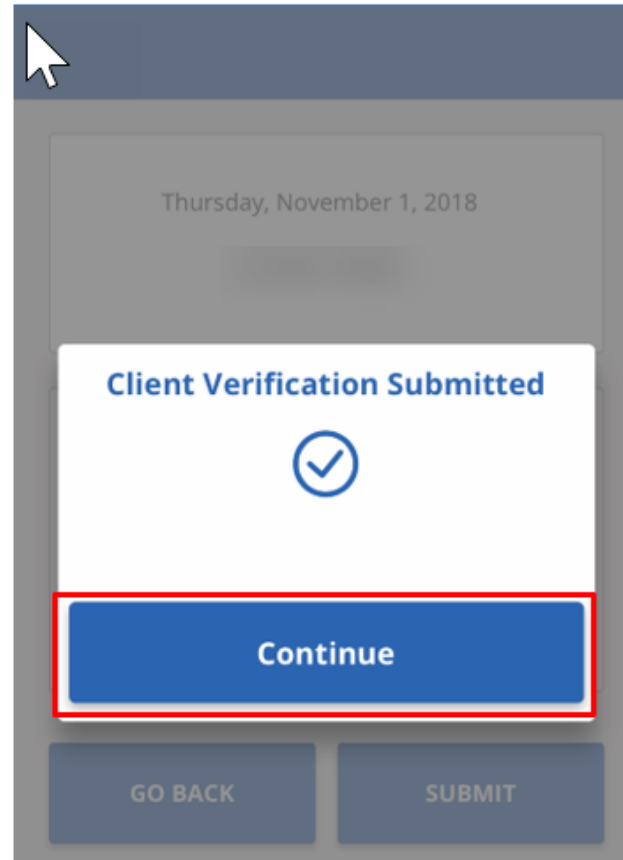
- Tap **SUBMIT** (Voice Confirmation)

The screenshot shows a mobile application interface with a blue header bar. Below the header, there is a white card containing the date "Thursday, November 1, 2018" and a blurred area. Below the blurred area, it says "Service: PCA-CHC". Below this card is another white card titled "IDENTIFICATION SUMMARY" in blue. Under the title, there is a blue play button icon and a progress bar with a white circle at the beginning. At the bottom of the screen, there are two blue buttons: "GO BACK" and "SUBMIT". The "SUBMIT" button is highlighted with a red rectangular border.

John,
(client)

“How do I
verify a visit?”

- Tap **CONTINUE**



Mary,
(employee)

“How do I
cancel a visit?”

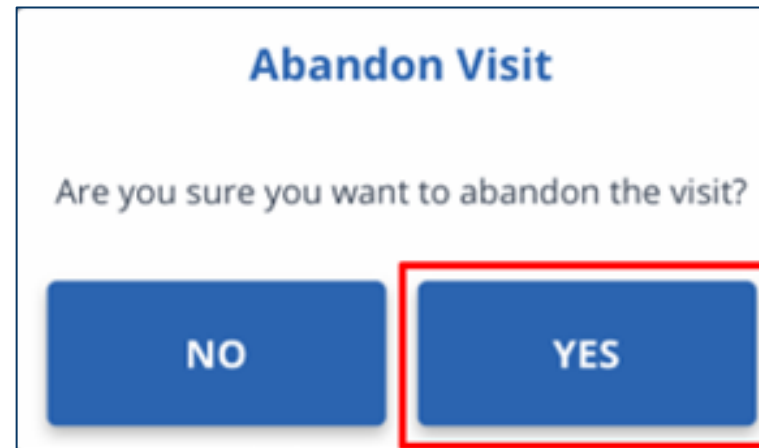
- There may be situations when an employee must cancel a visit that they started
- For example, if they forgot or were unable to check out at the end of a visit and they need to start a new visit for another client
- Tap **ABANDON VISIT**

The screenshot displays a mobile application interface. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. Below the header, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. The 'SEARCH CLIENT' tab is active. Underneath, there is a search input field labeled 'Enter Client Identifier' with a magnifying glass icon and a clear button. Below the input field is a blue button labeled 'SEARCH CLIENT'. The main content area shows a 'VISIT IN PROGRESS' screen for Thursday, November 1, 2018. It includes a blurred client name, 'Clock-In: 07:57 PM', and 'Service: PCA-CFC'. At the bottom, there are two blue buttons: 'ABANDON VISIT' (highlighted with a red box) and 'RESUME VISIT'.

Mary,
(employee)

“How do I
cancel a visit?”

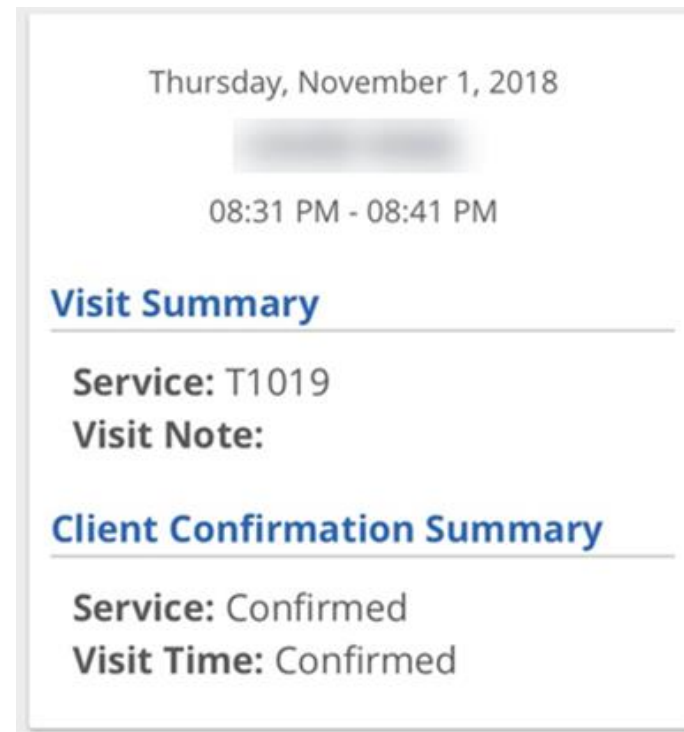
- Tap **YES**



Mary,
(employee)

“How do I view
a past visit?”

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



Thursday, November 1, 2018

08:31 PM - 08:41 PM

Visit Summary

Service: T1019
Visit Note:

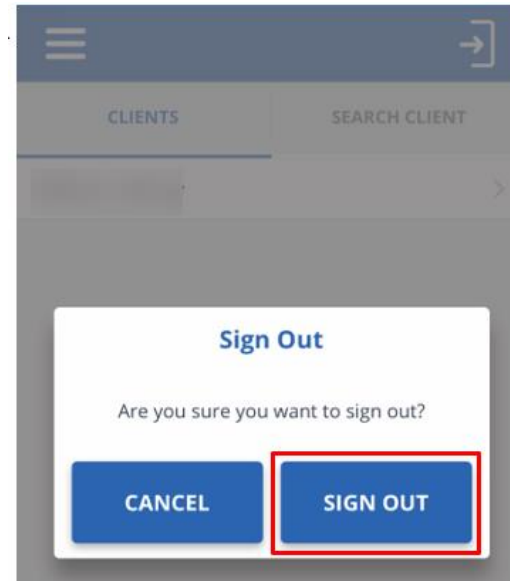
Client Confirmation Summary

Service: Confirmed
Visit Time: Confirmed

Mary,
(employee)

“How do I log
out?”

- 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

Thank You

Electronic Visit Verification by Sandata Technologies

