SANDATA MOBILE CONNECT

Universal
While the instructional materials contain the general functionality of the system, set up is contingent on agency/payer directed configuration. When available, please refer to the agency/payer specific training materials to obtain information on the workflow and the applicable functionality.
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Introduction

Sandata Mobile Connect is a mobile application installed on a smart phone. The application allows a user to verify the start and end of a visit without requiring the use of the client’s home telephone. The Sandata Mobile Connect app requires a connection to the internet via an Internet Service Provider (ISP) or Wi-Fi connection to transfer data to the Electronic Visit Verification (EVV) system.

Disconnected Mode

Sandata Mobile Connect has the ability to run even while not connected to the internet, provided the user has logged on at least once in a connected state. This is called Disconnected Mode. Sandata Mobile Connect saves all data and transfers that data to EVV system once the device reconnects to the internet and the user logs in to the application.

Downloading Sandata Mobile Connect

Warnings:
Only users installing Sandata Mobile Connect on a personal device should use the following download instructions.

Download Sandata Mobile Connect from the Google Play store or Apple’s App store, depending on the user’s device. Tap the application store icon on the device to launch the store and search for ‘Sandata Mobile Connect’ ( ), to locate and download the application.

Download Instructions

Use the provided links for Google and Apple’s official instructions on how to download and install applications for Android and iOS devices.

- Android Users: Google Play Store
- iOS Users: Apple App Store
Log-In to Sandata Mobile Connect

Login credentials change based on the Sandata application linked to the Sandata Mobile Connect (SMC) account and agency/payer configuration.

Initial Log-In

First time log-in: Users not using an email address to log-in must use agency provided log-in credentials.

- Sandata Electronic Visit Verification users: Login using the employee’s Santrax ID
- Sandata Agency Management users: Login using the employee’s username

First time log-in using an email address: Users who log-in with an email address must use the email address from their employee profile and the temporary password sent to that email address. This email also includes links to download SMC from the Google Play store or the Apple App store.

Note:
Check the spam folder if the password email doesn’t appear in the email account’s inbox.

Note:
Admin unlock: If too many consecutive unsuccessful log-in attempts are made, the account is locked. Accounts configured for admin unlock must contact the agency’s administrator to have the account unlocked.

Note:
In app unlock: If too many consecutive unsuccessful log-in attempts are made, the account is locked. When in app unlock functionality is enabled, users are automatically redirected to the reset password screen once the account is locked.
Log-In to Sandata Mobile Connect

1. Tap the Sandata Mobile Connect icon to launch the application.

2. Enter log-in credentials:
   
   A. COMPANY ID
      
      i. Sandata Electronic Visit Verification users: 2- followed by account number.  
         Example 2-#### (#### = account number)
      
      ii. Sandata Agency Management users: 3- followed by account number. 
         Example 3-#### (#### = account number)
   
   B. USERNAME - Username credentials change based on agency configuration.
      
      i. The employee’s Santrax ID
      
      ii. The employee’s Username
      
      iii. The email address from the employee’s profile
   
   C. PASSWORD - Password credentials change based on agency configuration.
      
      i. The employee’s employee ID
      
      ii. The temporary password
      
      iii. The temporary password sent to the email address on the employee’s profile
   
3. Tap LOG IN.
Note: If the user leaves the application for any reason (for example, taking a phone call), the application automatically logs out.

Security Setup (Initial Log-In)
For initial log-in users must answer a series of security questions. Security questions are skipped on subsequent log-ins. Users must keep the answers to these questions, they are required to complete the reset password process.

1. Select and answer the security questions.

Note: The number of security questions are based on the agency/payer configuration.

2. Tap NEXT.
3. Enter and re-enter a new password.

Note:
Password must:

A. be at least eight characters long.
B. have at least one upper case.
C. have at least one lower case letter.
D. have at least one numeric character.
E. have at least one special character (@#$%^).
F. not share three consecutive characters with the username.
G. not match one of the previous 24 passwords used.

4. Tap SUBMIT and the application returns to the login page.

Note:
Accounts can be configured so that passwords expire after 60 days (default) and must be reset. A warning message displays 10 days (default) prior to a password’s expiration date indicating the number of remaining days before the user’s password expires. After a password expires, the user must follow the reset password process. The length of time that can elapse before a password expires and how far in advance the warning message displays is configurable based on agency/payer configuration.
Language Select (Initial Log-in)

1. Tap the **Please select your preferred language** field
2. Select a language from the menu.
3. Tap **OK**.
4. Tap **CONTINUE**
5. Tap **CONFIRM**.

**Note:**
Language selection is saved by the application. The preferred language can be changed using the settings menu.
Reset Password/In App Unlock
The application allows users to reset passwords manually.

Note:
In App Unlock: If too many consecutive unsuccessful log-in attempts are made, the account is locked. When in app unlock functionality is enabled, users are automatically redirected to the reset password screen once the account is locked.

Follow the instructions to reset the password and unlock the account.

1. Enter the COMPANY ID and USERNAME.
2. Click FORGOT PASSWORD.
3. Answer the security questions selected during initial log-in.

4. Tap CONTINUE.

```
RESET PASSWORD

Please answer the following security questions
What is the name of your best childhood friend?
Answer

In what city did your mother and father meet?
Answer

CANCEL  CONTINUE
```

5. Enter and re-enter a new password.

6. Tap RESET.

```
RESET PASSWORD

Enter your new password and confirm it
NEW PASSWORD
Password

RE-ENTER NEW PASSWORD
Confirm Password

RESET
```
Navigation Bar

Users can access the Navigation Menu and Sign Out button using the Navigation Bar, which appears across the top of most screens in the application.

Navigation Bar buttons

1. **Menu Button** - Displays the navigation menu.
2. **Sign Out** - Logs the user out of the application and displays the log-in screen.
Navigation Bar

Navigation Menu Options
Tap the menu button to display the Navigation Menu.
This screen displays shortcuts to different functions:

- **My Visits** - Displays the My Visits screen.
- **Clients** - Displays the user to the Clients screen.
- **Settings** - Displays the Settings screen
- **GPS Map** - Displays a Google maps page that indicates each client’s location on a map. Tap a client’s indicator to open a details page displaying the client’s address and phone number.
- **Help** - Displays the application’s help document.
- **Sign Out** - Logs the user out and displays the log-in screen.
Settings Screen

Press the settings button (_MSB) to display the application settings. Some settings are configurable by the user, others are locked based on agency/payer configuration.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>Indicates the selected language and allows the user to change the preferred language.</td>
</tr>
<tr>
<td>Change Password</td>
<td>Allows user to manually change the password.</td>
</tr>
<tr>
<td>Application Timeout</td>
<td>Indicates the amount of time the application can remain idle before the user is timed out.</td>
</tr>
<tr>
<td>Idle Warning</td>
<td>Indicates the amount of time the application can remain idle before displaying an idle warning.</td>
</tr>
<tr>
<td>Client Identifier(s)</td>
<td>(Client ID): Indicates whether the user has the ability to search for a client by client ID.</td>
</tr>
<tr>
<td>Client Identifier(s)</td>
<td>(Last Name): Indicates whether the user has the ability to search for a client by last name.</td>
</tr>
<tr>
<td>Unknown Visit</td>
<td>Indicates whether the user has unknown visit functionality enabled.</td>
</tr>
<tr>
<td>Service Selection</td>
<td>Indicates whether users can select a service.</td>
</tr>
<tr>
<td>Service Selection</td>
<td>Indicates whether the user is required to select a service prior to starting a visit.</td>
</tr>
<tr>
<td>Visit Notes</td>
<td>Indicates whether the account is configured for visit notes.</td>
</tr>
<tr>
<td>Visit Notes</td>
<td>Indicates whether the account is configured to require visit notes.</td>
</tr>
<tr>
<td>Abandon Visit</td>
<td>Indicates whether the user has the functionality to abandon a visit once it is started.</td>
</tr>
<tr>
<td>Past Visit</td>
<td>Indicates the length of time visits will remain on the PAST tab.</td>
</tr>
<tr>
<td>Future Visits</td>
<td>Indicates how many days of scheduled visits display on the UPCOMING tab.</td>
</tr>
<tr>
<td>Auto Close Visit</td>
<td>Indicates the amount of time that can pass before a visit is automatically abandoned by the application.</td>
</tr>
<tr>
<td>Location Required</td>
<td>Indicates whether location services are must be enabled to use the application.</td>
</tr>
<tr>
<td>Check In Only</td>
<td>Indicates that the users are only required to start a visit.</td>
</tr>
<tr>
<td>Auto Update</td>
<td>Indicates that the account is set up to automatically receive application updates.</td>
</tr>
<tr>
<td>Client Search</td>
<td>Indicates whether the account has Client Search functionality enables.</td>
</tr>
</tbody>
</table>

My Visits Screen
Upcoming
The UPCOMING tab displays a list of upcoming (scheduled) visits. Visits are sorted by start time in descending order with the earliest visit appearing first.

Tap visit from the list on the UPCOMING tab to open a visit details screen. This screen displays the client’s address and phone number. Tap the address to open a Google Maps page that shows the client’s address on a map. Tap the client’s phone number to populate the device’s dialer with the phone number from the client’s profile.

Note:
For security reasons, using the call client function logs the user out of the application.
Past

The PAST tab displays visits that occurred within an agency/payer defined timeframe. Tap visit from the list on the PAST tab to display a visit details screen. The defined time is visible in the Past Visits field on the Settings screen.
The CLIENTS tab displays a list of clients (sorted alphabetically by last name) associated with the user logged into the application. Tap client from the list on the CLIENTS tab to display a details screen.
SEARCH CLIENT
The SEARCH CLIENT tab allows users to search for a specific client or start an unknown visit. Accepted client identifiers (for example: last name, client ID) are identified on the Settings screen. Accepted client identifiers can change based on agency/payer configuration.
Starting a Visit

There are multiple options for starting a client visit, these options may change based on agency configuration.

Starting a Visit (Clients Tab)

Navigate to the CLIENTS tab and follow the instructions to start a visit.

1. Tap a client from the list.

2. Tap CONTINUE.
3. Tap the **Select Service** field as applicable.

4. Select a service from the list.

5. Tap **OK**

6. Tap **START VISIT**.
7. Tap **YES** to start the visit.
Starting a Visit from the Search Client tab (Known Client)

Navigate to the SEARCH CLIENT tab and follow the instructions to start a visit.

1. Tap the Enter Client Identifier field, enter search criteria.
2. Tap SEARCH CLIENT.
3. Tap CONTINUE VISIT.
4. Tap the **Select Service** field

5. Select a service from the list.

6. Tap **OK**.

7. Tap **START VISIT**.
8. Tap **YES** to start the visit.
**Group Visits**

Group Visit functionality allows multiple employees to provide services for two or more individual clients. A group visit is defined as visits for two or more individual clients, linked by a shared group visit code. A group visit code is a unique value assigned to each visit that occurred as part of the group visit and links the visits together.

1. Tap **START GROUP VISIT**.
2. Tap the **Select Service** field.
3. Select a service from the list.
4. Tap **OK**.

5. Tap **START GROUP VISIT**.
Starting a Visit

6. Tap **YES** to start the group visit.
Starting a Visit

Group Visit screen
The Group Visit screen displays the group visit code and allows users to manage group visits. On this screen, users can add additional clients to the group visit, complete or abandon visits for individual clients and complete or abandon all visits they are attending as part of the group visit. To complete an individual visit, tap the ( ) button and follow the standard procedure to complete a visit. To abandon an individual visit, tap the ( ) button.
Adding a Client to a Group Visit

After starting a group visit, users can add additional clients to the group visit.

4. Tap ADD CLIENT

![ADD CLIENT button on the mobile application interface]
5. Search for a client.
6. Click **CONTINUE VISIT**.
Starting a Visit

7. Tap the **Select Service** field.
8. Select a service from the list.
9. Tap **OK**.

10. Tap **START GROUP VISIT**.
11. Tap **YES**.
Adding a Client to a Group Visit Started by Another Employee

If another employee has a group visit in progress, additional employees can add clients to that group visit using a group visit code. To add a client to a group visit started by another employee, search for a client and follow the instructions below.

4. Tap JOIN GROUP VISIT.
5. Enter a group visit code.
Group visit codes are generated when a group visit is started and are required for joining an in-progress group visit. The group visit code displays at the top of the group visit screen.
6. Tap **JOIN GROUP VISIT**.
4. Tap the **Select Service** field.
5. Select a service from the list.
6. Tap **OK**.

7. Tap **START GROUP VISIT**.
Completing a Group Visit

Employees can complete visits for all clients on the group at once, but the group visit remains active until each employee has completed all visits for all clients associated with that group visit.

4. Tap **COMPLETE GROUP VISIT**.
5. Tap **YES**
   The group visit is completed.
Starting a Visit from the Search Client tab (Unknown Client)

Navigate to the **SEARCH CLIENT** tab and follow the instructions to start a visit.

1. Tap **START UNKNOWN VISIT**.
Starting a Visit

2. Enter the required fields.
   Asterisks (*) indicate required fields.

3. Tap the **CONTINUE VISIT**.
   Tapping **CONTINUE VISIT** starts a standard visit with an unknown client. Tap **START GROUP VISIT** to start a group visit with an unknown client or tap **JOIN GROUP VISIT** to add an unknown client to an existing group visit. There is a limit of one unknown client per group visit.
Starting a Visit

4. Tap the **Select Service** field
5. Select a service from the list.
6. Tap **OK**.

7. Tap **CONTINUE**.
8. Tap **YES** to start the visit.
Starting a Visit from the UPCOMING Tab (Scheduled)

1. Tap a visit from the list of available visits on the UPCOMING tab.

2. Tap **CONTINUE**.
3. Tap **YES** to start the visit.
Completing a Visit

Additional Visit Functionality
Some accounts are configured to allow or require task entry, health observations, visit notes or other surveys prior to completing a visit. A pop-up window displays, prompting users to complete any additional surveys required by agency/payer configuration.

Tasks (Including Plan of Care)
The TASKS tab allows users to record the completion of any tasks performed during the visit. Some accounts are configured to use a Plan of Care (PoC). When a client has a PoC, required tasks are automatically populated in the TASKS tab. Select the completed tasks from this list.

1. Tap **ADD TASKS** to open the task list
2. Tap the applicable task(s) from the task list.
   Some tasks require the user to enter a value in the field (e.g. weight, blood pressure, or car fare).
3. Tap **Add Tasks** to close the task list.
4. Tap Task Complete or Client Refused.
Clearing Task Selection

After tapping either Task Completed or Client Refused, the CLEAR TASKs button displays under each selected task. Tap CLEAR TASKS to clear the selection for that task.
Observations
Use the OBSERVATIONS tab to record health observations for the visit.

1. Tap the OBSERVATIONS tab.
2. Tap Yes or No for each question.
Visit Notes
Use the VISIT NOTE tab to record any notes for the visit.

1. Tap the VISIT NOTE tab.

2. Tap the Type visit note field, enter any notes about the visit.
Completing a Visit (Staff)

1. Log-in to the application.
2. Tap **RESUME VISIT**.
3. Complete any additional visit functionality, such as visit notes or tasks.

4. Tap **COMPLETE VISIT**.
5. Tap **CONFIRM**.
   Depending on agency/payer configuration, the application returns the user to the landing page or displays a prompt to begin the client confirmation process.
Complete a Visit (Client Confirmation)

If the agency’s configuration requires client confirmation, follow the instructions below to allow the client to confirm visit data.

1. Pass the device to the client to verify the visit, if required by the agency/payer configuration.
2. Tap the Please select your preferred language field.

3. Select a language.

4. Tap OK.

5. Tap CONTINUE.
6. Tap **CONFIRM** or **DENY** to record approve or reject the **Service** and **Visit Time**.

7. Tap **CONTINUE**.
8. Tap CONFIRM.
9. Tap either.
   A. **SIGNATURE**.
      i. Sign the device using a finger.
      ii. Tap **CONTINUE**.

   ![Signature Input on Device]

   **Note:**
   Tap 🗿 to clear the signature field.
B. VOICE RECORDING.

i. Tap Record ( ).
   The client speaks their name and the date into the device.

ii. Tap the record button to stop the recording.

iii. Tap CONTINUE.

Note: Tap record to overwrite an existing voice recording.

Note: Voice recordings can be a maximum of 15 seconds. Click the play button to play the recorded audio.
10. Tap **SUBMIT**.

**Signature Confirmation**

11. Tap **CONTINUE**.

**Voice Recording Confirmation**
Abandon Visit

There may be situations in which a started visit must be canceled. For example, if a staff member forgot to check out of a visit in progress but must start a new visit.

1. Tap **ABANDON VISIT**.

![Abandon Visit Screen](image_url)

2. Tap **YES**.

![Confirmation Screen](image_url)
Sign Out of Sandata Mobile Connect

Sign Out

1. Tap the sign out icon ().
2. Tap SIGN OUT to log out of the application.