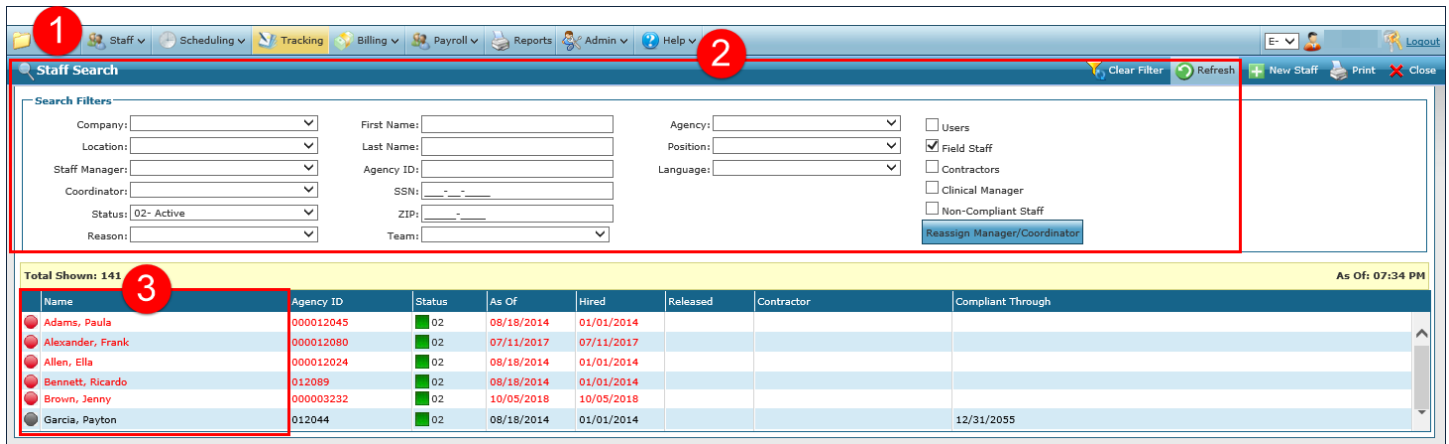


Moving Existing Field Staff from Sandata MVV to SMC

Field staff already using Sandata Mobile Visit Verification (MVV) must be manually moved from the Sandata MVV application to Sandata Mobile Connect (SMC). This document outlines the steps that must be taken to move a field staff member from Sandata MVV to SMC.

1. Navigate to the Staff Search screen. (Main Menu: **Staff**)
2. Search for a field staff member.
3. Select a field staff member.



Staff Search

Search Filters:

Company: [Dropdown] First Name: [Text] Agency: [Dropdown] Users

Location: [Dropdown] Last Name: [Text] Position: [Dropdown] Field Staff

Staff Manager: [Dropdown] Agency ID: [Text] Language: [Dropdown] Contractors

Coordinator: [Dropdown] SSN: [Text] Clinical Manager

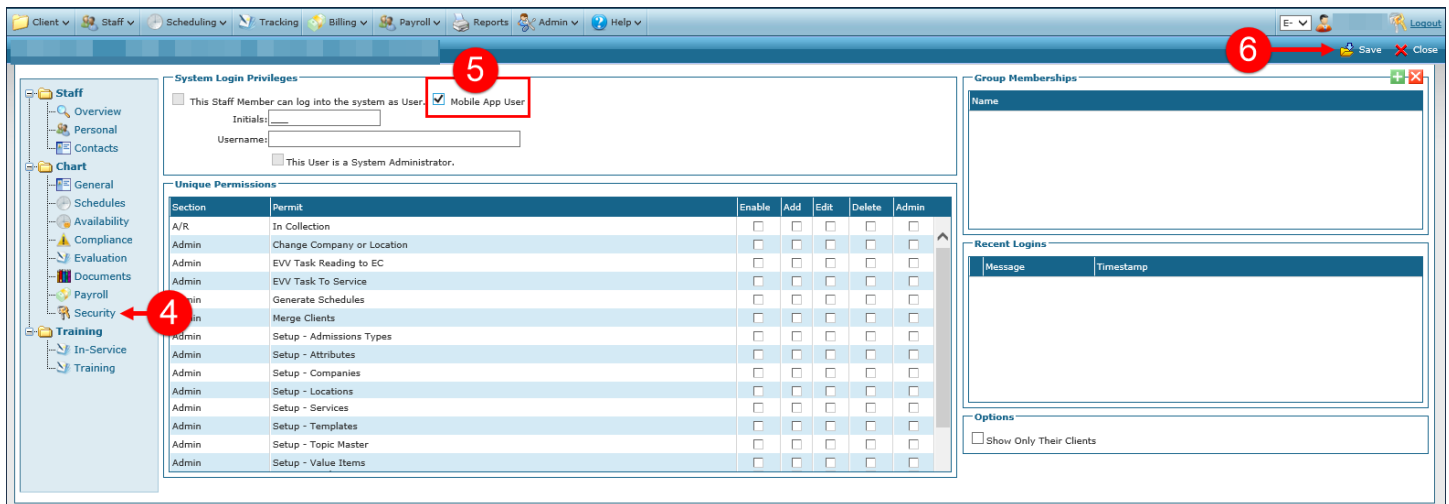
Status: 02- Active ZIP: [Text] Non-Compliant Staff

Reason: [Dropdown] Team: [Dropdown] [Reassign Manager/Coordinator](#)

Total Shown: 141 As Of: 07:34 PM

Name	Agency ID	Status	As Of	Hired	Released	Contractor	Compliant Through
Adams, Paula	000012045	02	08/18/2014	01/01/2014			
Alexander, Frank	000012080	02	07/11/2017	07/11/2017			
Allen, Ella	000012024	02	08/18/2014	01/01/2014			
Bennett, Ricardo	012089	02	08/18/2014	01/01/2014			
Brown, Jenny	000003232	02	10/05/2018	10/05/2018			
Garcia, Payton	012044	02	08/18/2014	01/01/2014			12/31/2055

4. Click **Security**.
5. Deselect the **Mobile App User** checkbox.
For staff members currently using the Sandata MVV application, this checkbox will be selected and must be deselected.
6. Click **Save**



System Login Privileges

This Staff Member can log into the system as User. Mobile App User

Initials: [Text] Username: [Text]

This User is a System Administrator.

Unique Permissions

Action	Permit	Enable	Add	Edit	Delete	Admin
A/R	In Collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Change Company or Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	EVV Task Reading to EC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	EVV Task To Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Generate Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Merge Clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Admissions Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Attributes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Topic Master	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin	Setup - Value Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Memberships

Recent Logins

Message	Timestamp

Options

Show Only Their Clients

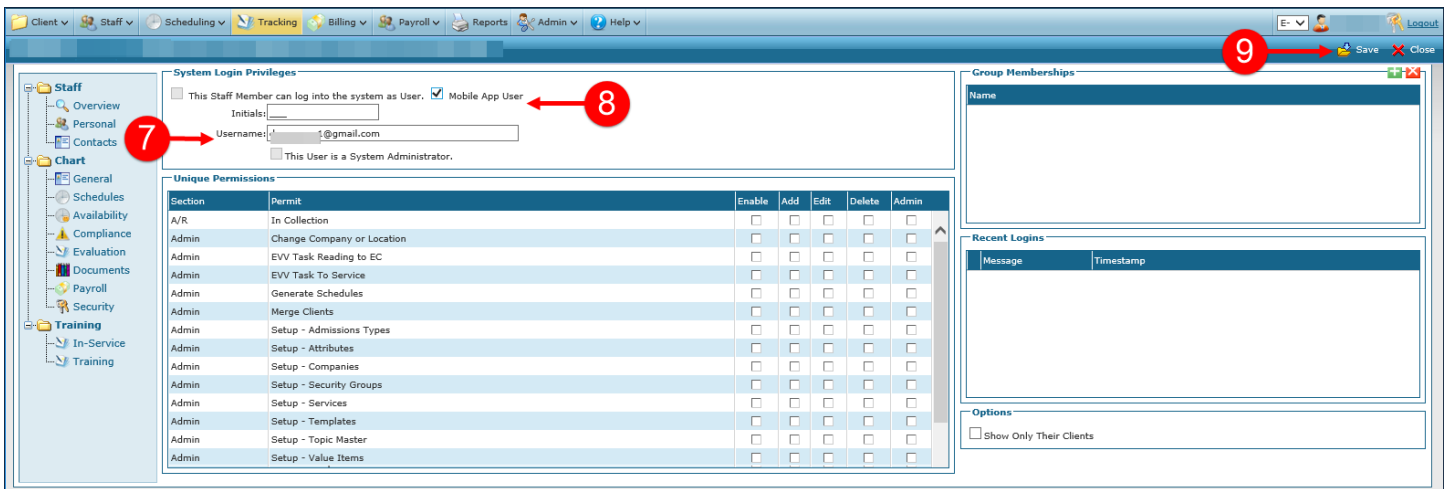
7. Enter a **Username**.

Usernames must be an email address of the field staff who will be using SMC, as an email with a temporary password required to log into SMC is sent to this email address. The field staff member being set up for SMC must have access to the email address entered in this field. If the username entered in this field is already in use, a pop-up displays asking the user to pick a different username.


8. Select the **Mobile App User** checkbox.

9. Click **Save**.

A pop-up containing the temporary password required to log into the SMC application displays after clicking **Save**. This temporary password is also sent to the email address entered in the **Username** field.



Message from webpage




The user's temporary password has been set to m50274085.

OK

Hi Ella Allen,

Your username to login to Sandata Mobile Connect is
[redacted] @gmail.com and your temporary password for Company
 ID [redacted] s:
 m50274085

Please remember to take your Company ID, Username and Temporary Password with you for your next client visit. Your temporary password will expire on 9/14/2019. If your temporary password expires or if you experience any issues with logging into Sandata Mobile Connect, please contact your EVV Administrator or your EVV program's Customer Support.



Note: To enable Sandata Mobile Connect for a new field staff member, create a new staff profile following the regular process then enter an email address into the Username field, select the **Mobile App User** checkbox and click **Save** to generate a temporary password.



Moving Field Staff to Sandata Mobile Connect

Temporary Password Troubleshooting

If the field staff does not receive the temporary password and it is not in the junk mail file of their email inbox, users can tap the **Forgot Password?** link on the SMC login screen, then tap “Email Temporary Password” to send a new temporary password to the email address entered in Santrax® Agency Management.