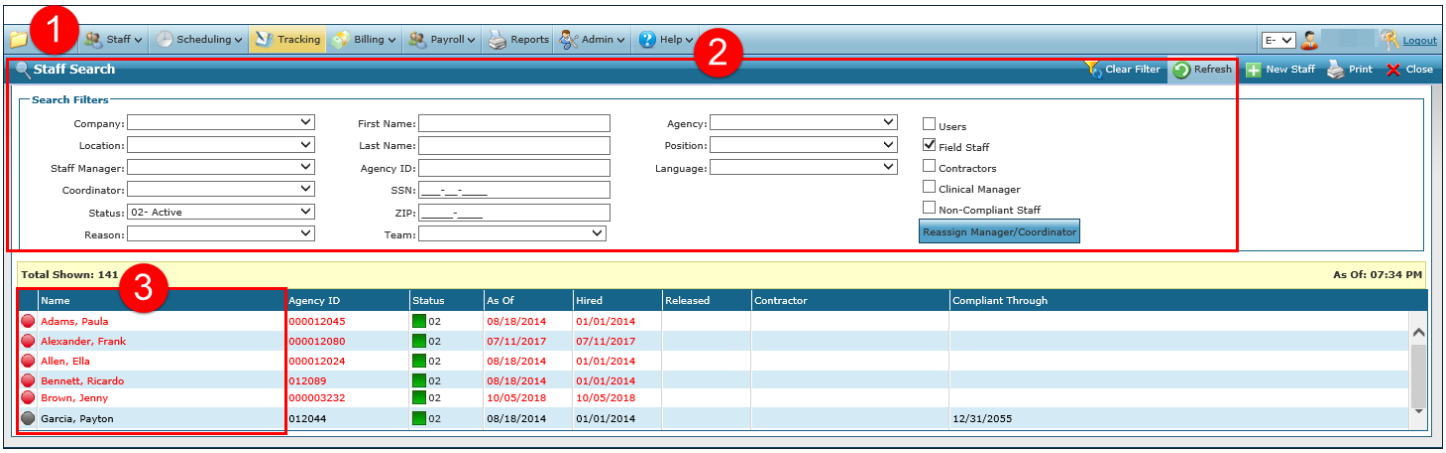
Moving Field Staff to Sandata Mobile Connect

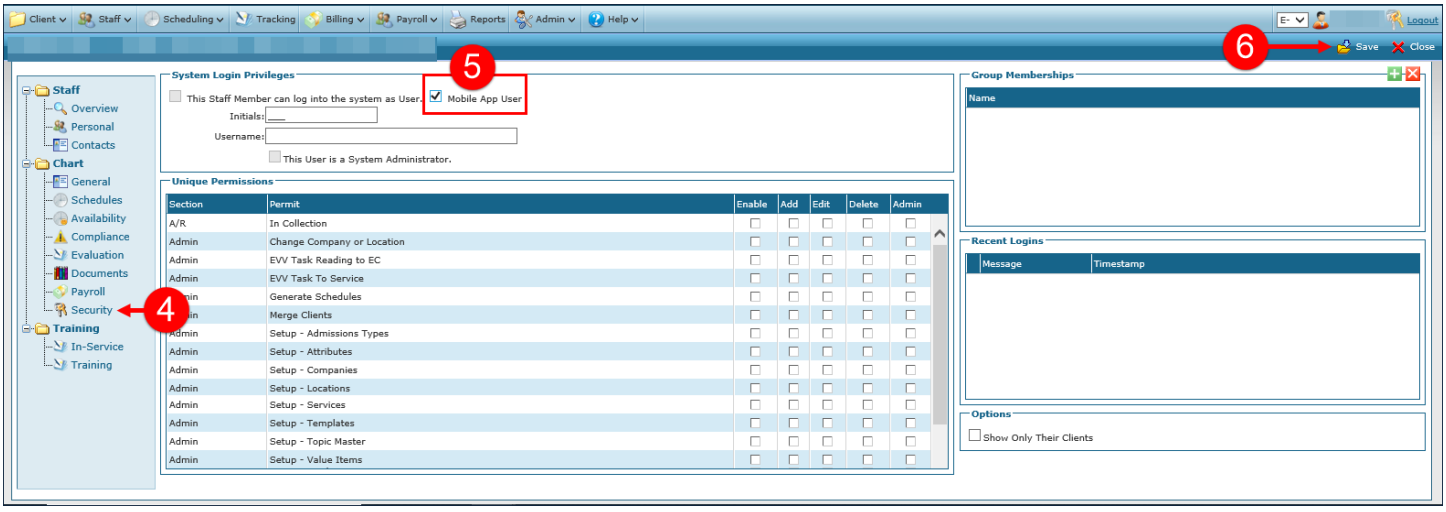
Moving Existing Field Staff from Sandata MVV to SMC

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.

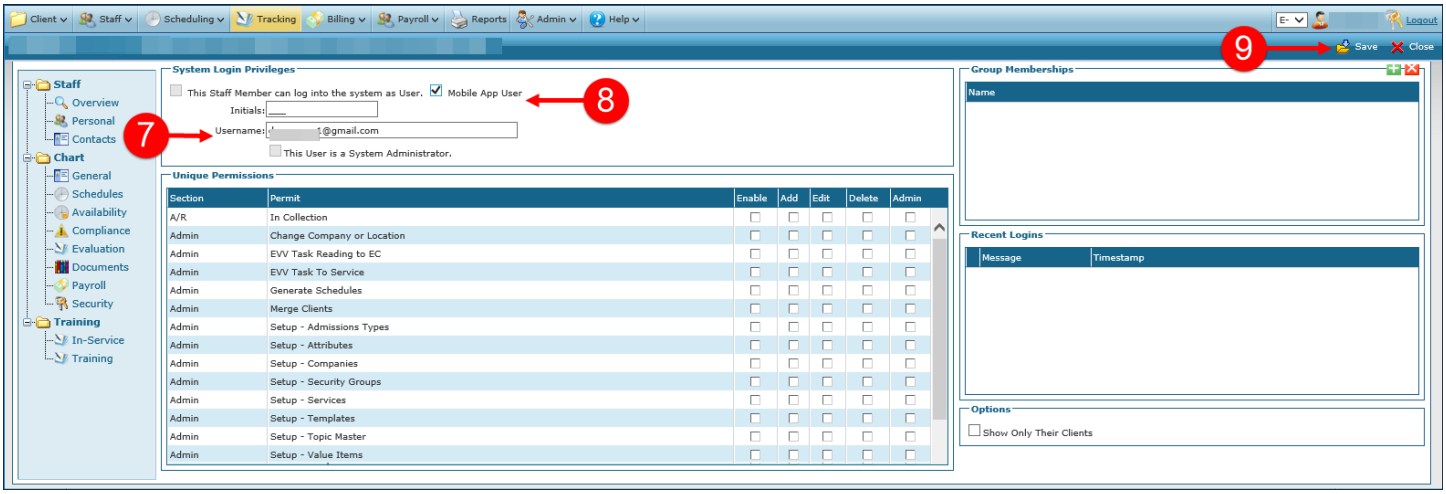


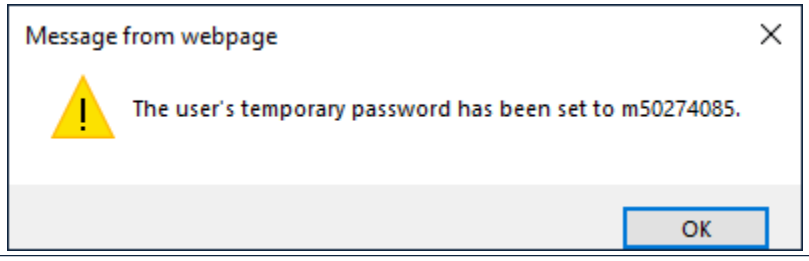
4. Click **Security**.
5. Deselect the **Mobile App User** checkbox.
   For staff members currently using the Sandata MVV application, this checkbox will be selected and must be deselected.
6. Click **Save**

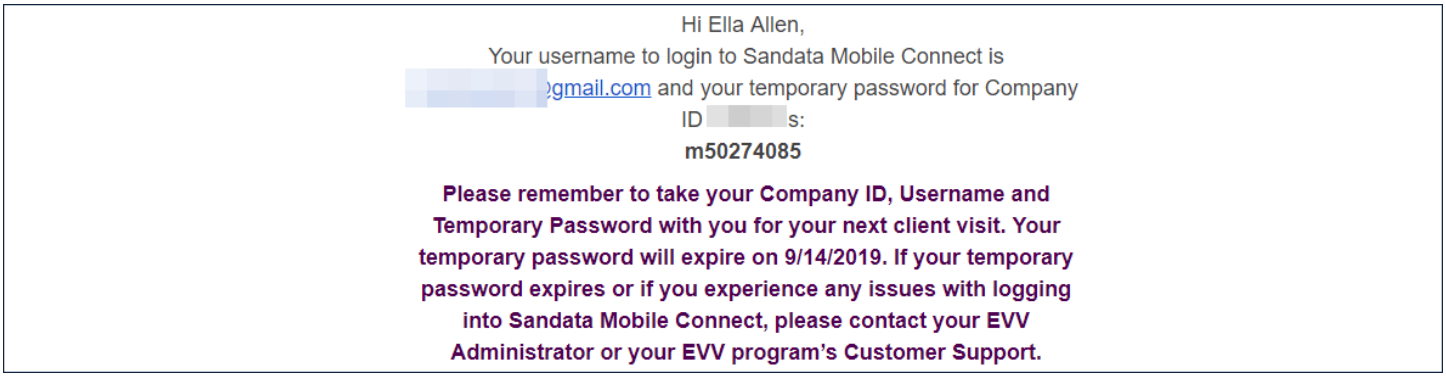


Proprietary and Confidential. Copyright © 2019 Sandata Technologies, LLC. All rights reserved

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.







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.*

Proprietary and Confidential. Copyright © 2019 Sandata Technologies, LLC. All rights reserved

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.

Proprietary and Confidential. Copyright © 2019 Sandata Technologies, LLC. All rights reserved