

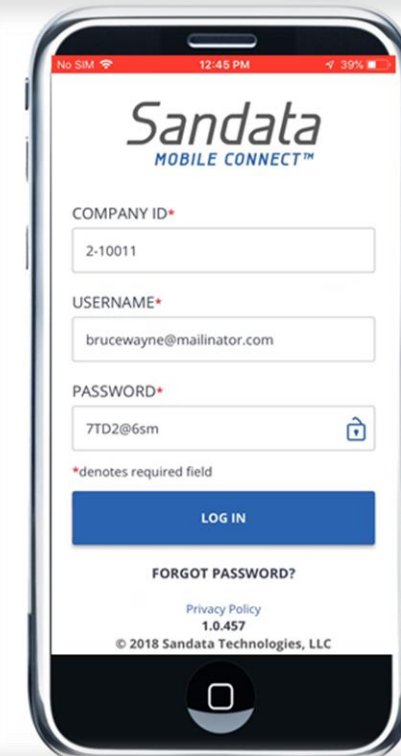
SANDATA MOBILE
CONNECT



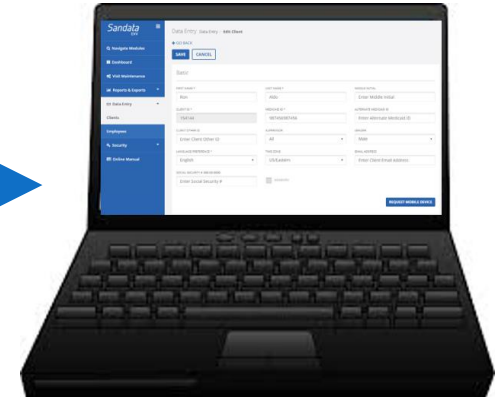
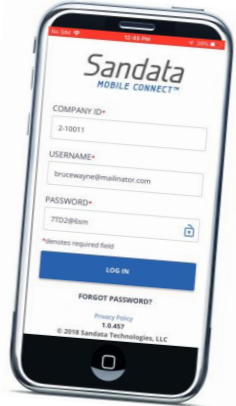
SMC

Sandata Mobile Connect (SMC)

for Clients



What We Will Cover



Overview:

- Overview
- The Roles in EVV
- How it Works

Employee:

- Sandata Mobile Connect app
- Installing the SMC app
- Signing into the app
- Starting & Ending a Visit
- Adding Tasks to a Visit

Client & Employee:

- How to Verify a Visit

What is the Sandata Mobile Connect app?

Known as S.M.C.

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

Objective

To provide a basic overview of how the Sandata Mobile Connect app (SMC) will be used by the employee during a visit with a client.

It's important for the client to understand how they may be required to interact with the mobile app with their employee during a visit in order to verify a visit.

The Roles of EVV

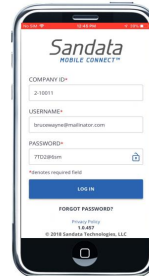
- **Employee** = The Employee providing care
 - Clocks in and out using either the client's phone or Sandata's Mobile Connect app.
- **Client** = The person receiving care
 - Will use the EVV website to edit and approve visits.
- **Designee** = A client's representative
 - A person designated to handle 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

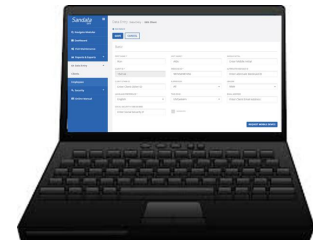
- The Employee arrives at the Client's home, opens the SMC app, clocks in and begins the Visit.



- 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 can view, edit and make changes to visits so they can be verified for payment.



Installing the SMC app

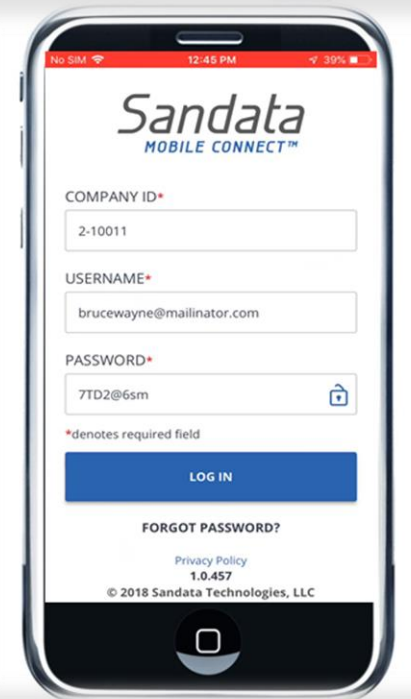
- The employee will be given the **Sandata Mobile Connect app Guide** with more in-depth details on how to use SMC.
- The employee will have access to take the online **Sandata Mobile Connect app** course to learn how to install, setup and use the app for visits.

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SMC

Logging in & Starting a Visit



The employee will enter the following required information when logging into SMC.

The information is included in a temporary password email that is sent to the employee.

- **COMPANY ID**

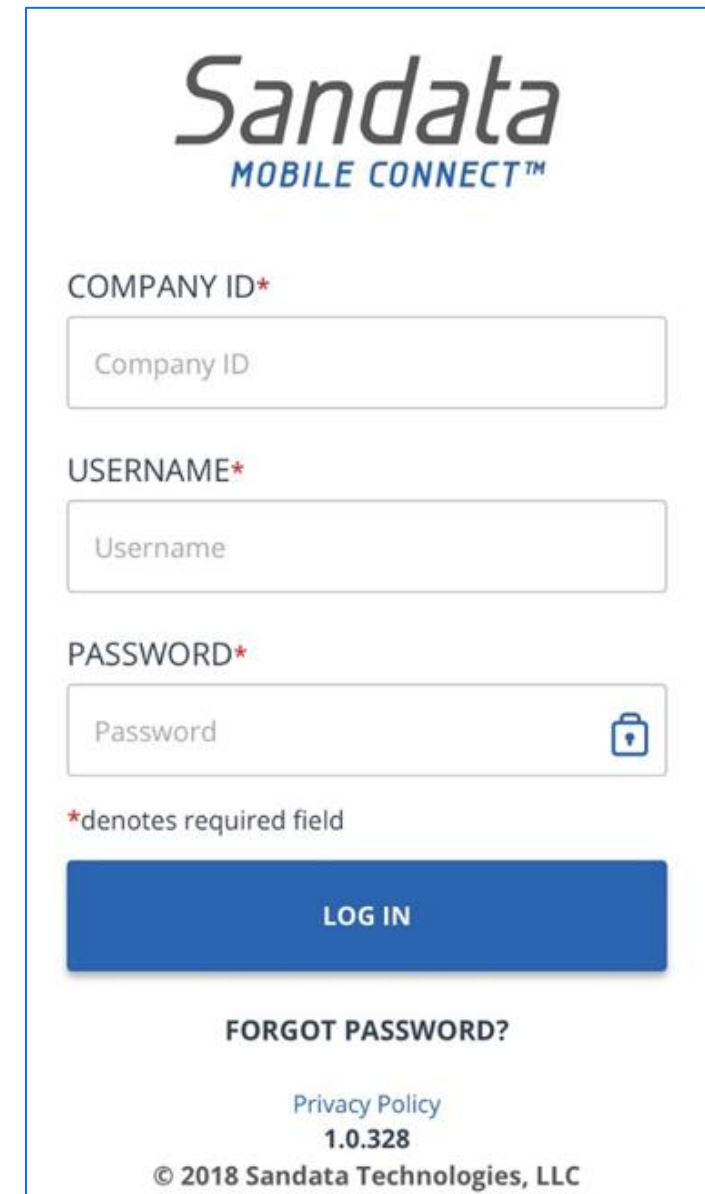
- Begins with the '2-' followed by the assigned account number.

- **USERNAME**

- The employee's email address.

- **PASSWORD**

- The temporary password the employee received in their email after they completed their training.



The image shows a login form for Sandata MOBILE CONNECT™. 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 on the right. Below the fields is a note '*denotes required field'. A large blue 'LOG IN' button is centered below the fields. 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'.

When the employee logs in for the first time to the SMC app, they will be prompted to setup their security questions and answers.

SECURITY SETUP

Please fill out the following security questions for your account

Please select a security question

Please enter your answer

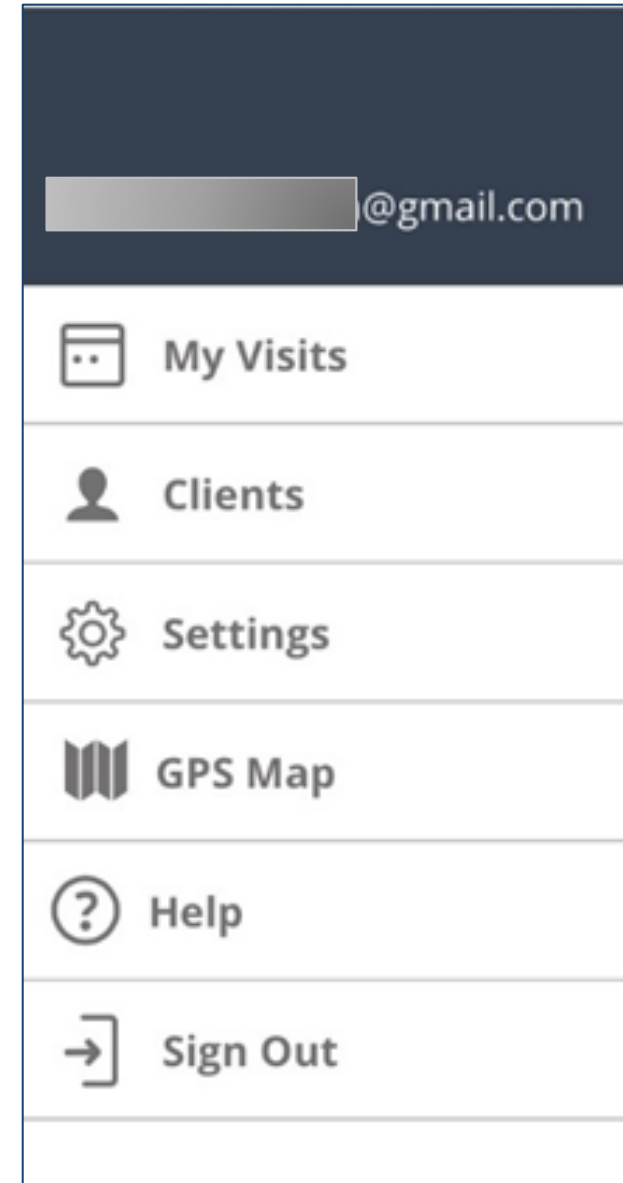
Please select a security question

Please enter your answer

Please select a security question

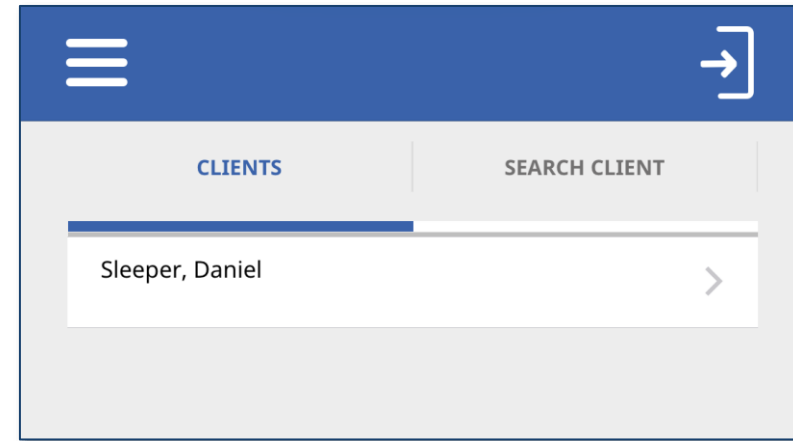
SMC MENU View

- **My Visits**
 - Displays upcoming and past visits (based on configuration)
- **Clients**
 - Displays the Clients screen
- **Settings**
 - Displays the **Settings** screen
- **GPS Map**
 - Displays a map with a pin at their current location
- **Help**
 - Displays the **Help** screen
- **Sign Out**
 - Logs out of the mobile app and displays the **Log In** screen

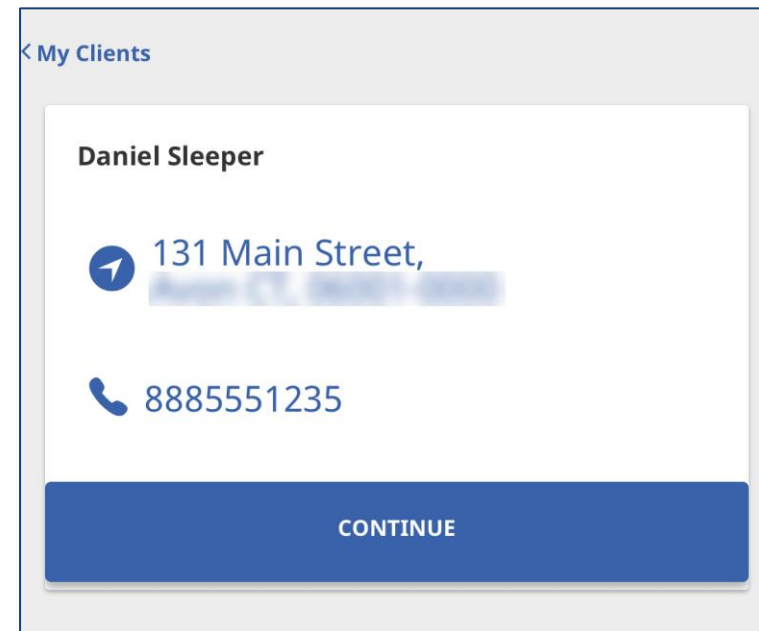


An employee will start a visit from the “**My Clients**” screen in SMC.

- The employee will tap the **client’s name** from the list to start a visit.



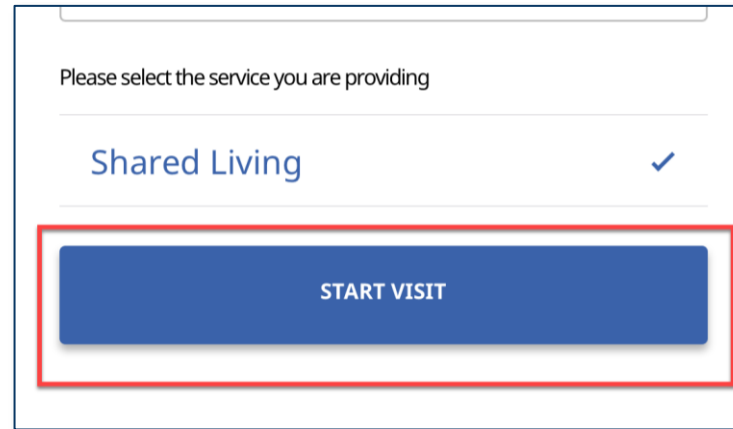
- Then tap **CONTINUE**



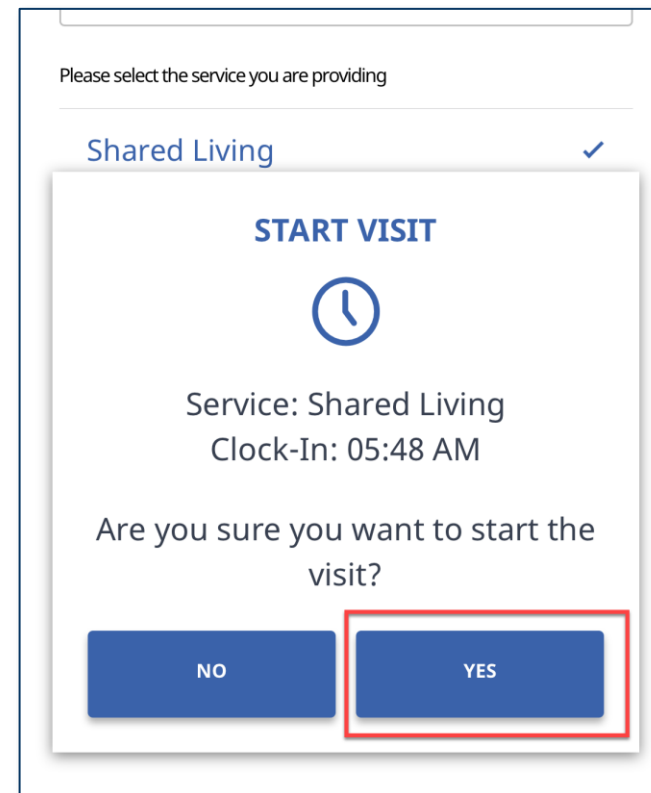
- They will tap **Select Service** and tap a service from the list.
- There may only be one service to select.

The screenshot shows a mobile application interface with a blue header bar. On the left of the header is a hamburger menu icon, and on the right is a right-pointing arrow icon. Below the header, the date "Friday, December 18, 2020" is displayed in a light gray box, followed by the name "DANIEL SLEEPER" in bold. Below this, the text "Please select the service you are providing" is shown. A red rectangular box highlights a single selection option: "Shared Living" with a blue checkmark to its right. At the bottom of the screen is a large blue button with the text "START VISIT" in white.

- The employee taps **START VISIT**.



- Then taps **YES** to start the visit.



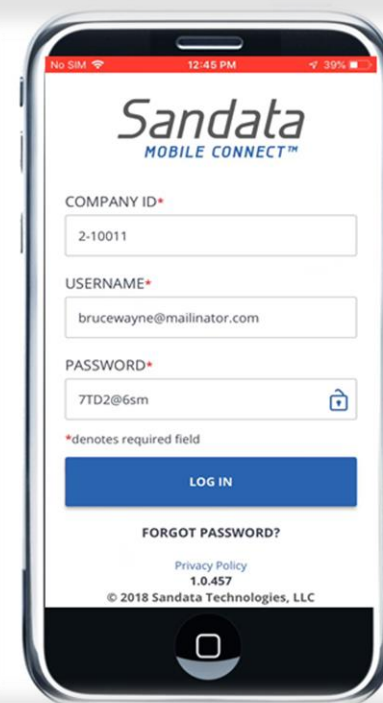
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SMC

DEMO VIDEO

- * Logging in
- * Starting a Visit

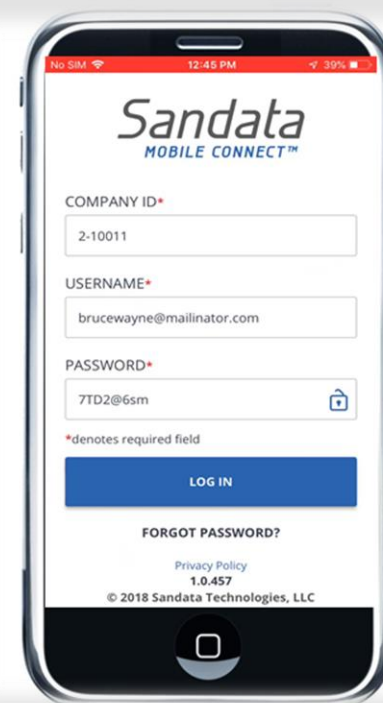


SANDATA MOBILE
CONNECT



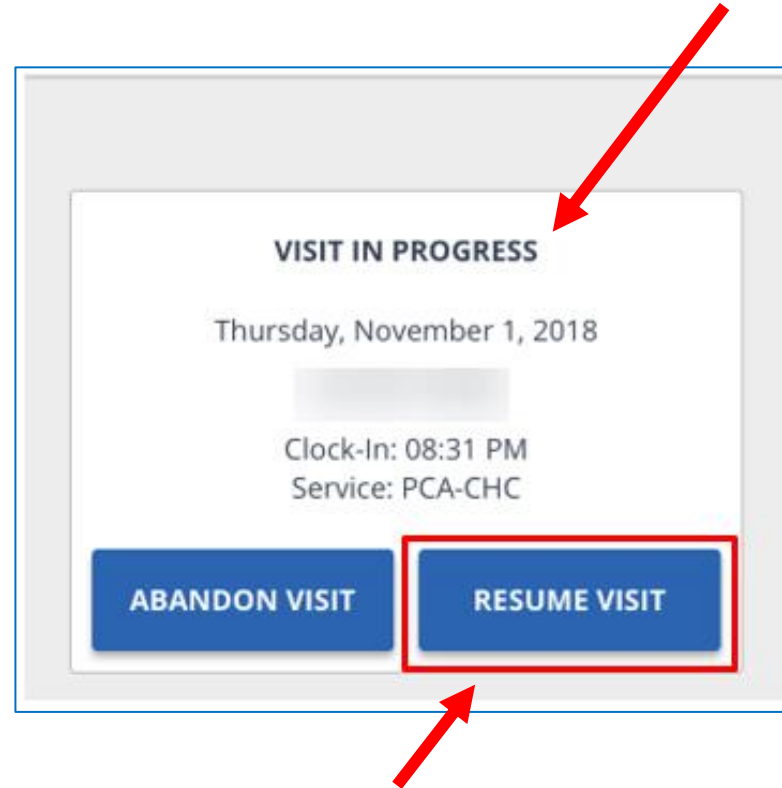
SMC

Ending a Visit



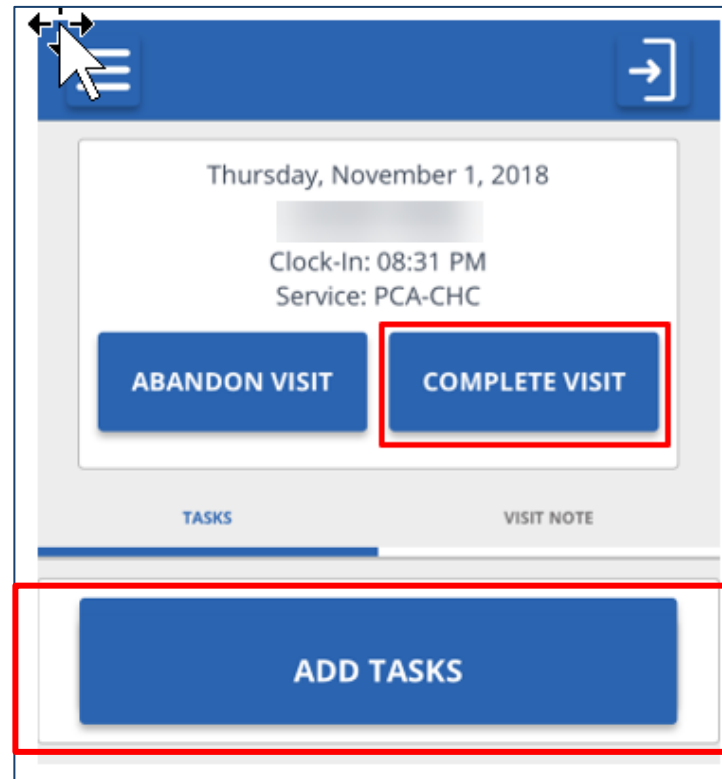
Ending a Visit

- The employee logs back into the SMC app.
- The visit will display as **VISIT IN PROGRESS**.



They will tap **RESUME VISIT**

- The employee will tap **COMPLETE VISIT**.
 - The employee *may* be required to add at least one task.



- Tap **ADD TASKS**.

- The employee may be required to add tasks.
- They'll tap each task performed during the visit.
- Then tap either **Task Completed** or **Client Refused** for each task selected.

-
- **Task Completed** means the task(s) were completed during the visit.
 - **Client Refused** means the task(s) was attempted during the visit, but the client did not want the task done.

The screenshot shows a mobile application interface with a blue header bar containing a menu icon (three horizontal lines) on the left and a back arrow icon on the right. Below the header is a large blue button labeled "ADD TASKS". Underneath this button is a list of tasks, each with a checkbox:

- Diet monitoring meal preparation education
- Dressing undressing
- Educational planning
- Emergency and safety skills
- Errands
- Feeding

Below the task list, there are two sections for selecting the status of each task:

- Diet monitoring meal preparation education**
 - Task Completed
 - Client Refused
- Feeding**
 - Task Completed
 - Client Refused

Friday, November 2, 2018

Clock-In: 07:48 AM
Service: PCA-CFC

ABANDON VISIT COMPLETE VISIT

TASKS VISIT NOTE

ADD TASKS

- Accompany on walks
- Accompany to medical appointment
- Accompany to other Location
- Assist tube feeding
- Assist with ambulation

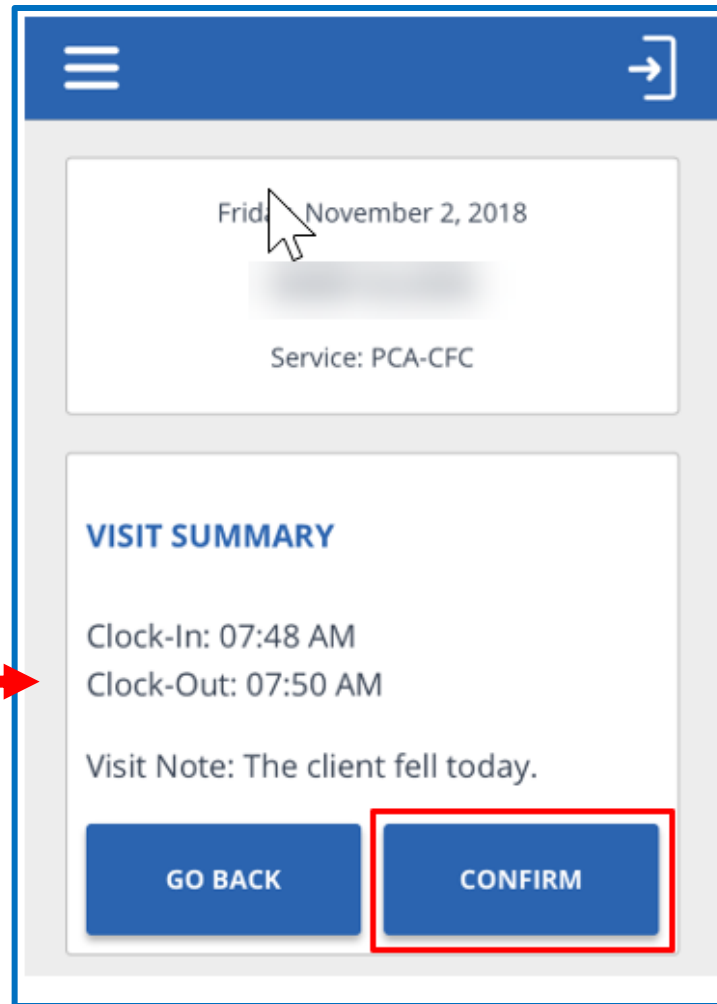
Diet monitoring meal preparation

- They will tap **COMPLETE VISIT** when done.

- The employee has the **option** to add notes regarding the visit.

The screenshot shows a mobile application interface for a visit form. At the top, there are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". Below these is a "TASKS" section with two tabs: "TASKS" and "VISIT NOTE". The "VISIT NOTE" tab is highlighted with a red border. The main content area contains a text input field with the prompt "Are there any additional details you would like to provide?". Below the prompt, the text "The client fell today." is entered. At the bottom of the screen is a virtual keyboard with keys for Q, W, E, R, T, Y, U, I, O, P; A, S, D, F, G, H, J, K, L; a shift key, Z, X, C, V, B, N, M, and a delete key; and a row with "123", a smiley face icon, a microphone icon, a "space" key, and a "return" key.

- The employee should review the information.



- Then tap **CONFIRM**.

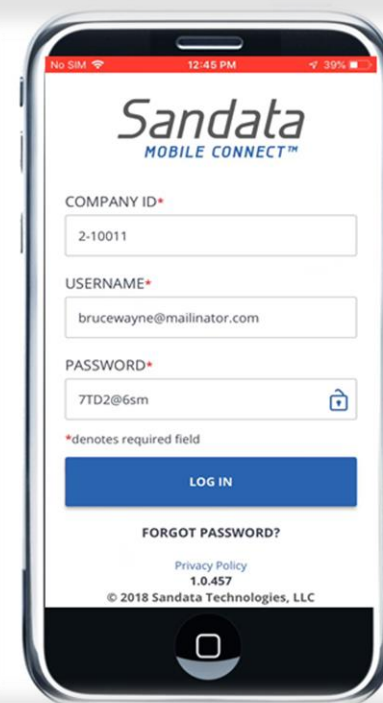
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SMC

DEMO VIDEO

* Ending a Visit



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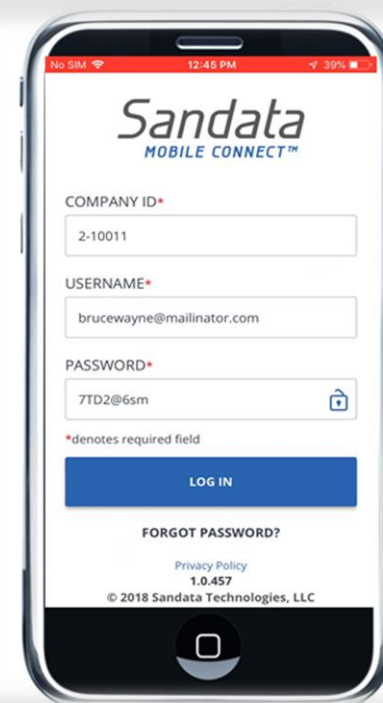


SMC

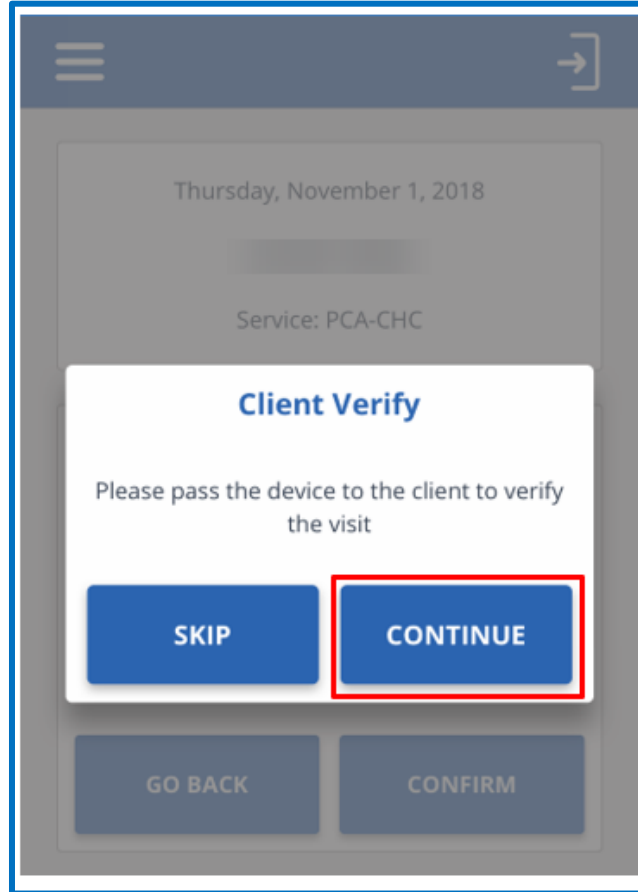
Client Verification

*Audio

*Signature



The employee will tap **CONTINUE** and pass the mobile device to the client to verify the visit.



- The client will need to select their preferred language by tapping the Language field and selecting their preferred language.

**** English may be the only language in the list***

Friday, December 18, 2020

SAM WENN

Service: Attendant Care

Please select your preferred language

English ✓

CONTINUE

Selected language



Friday, December 18, 2020

SAM WENN

Service: Attendant Care

Please select your preferred language

English ✓

CONTINUE

Tap **CONTINUE**

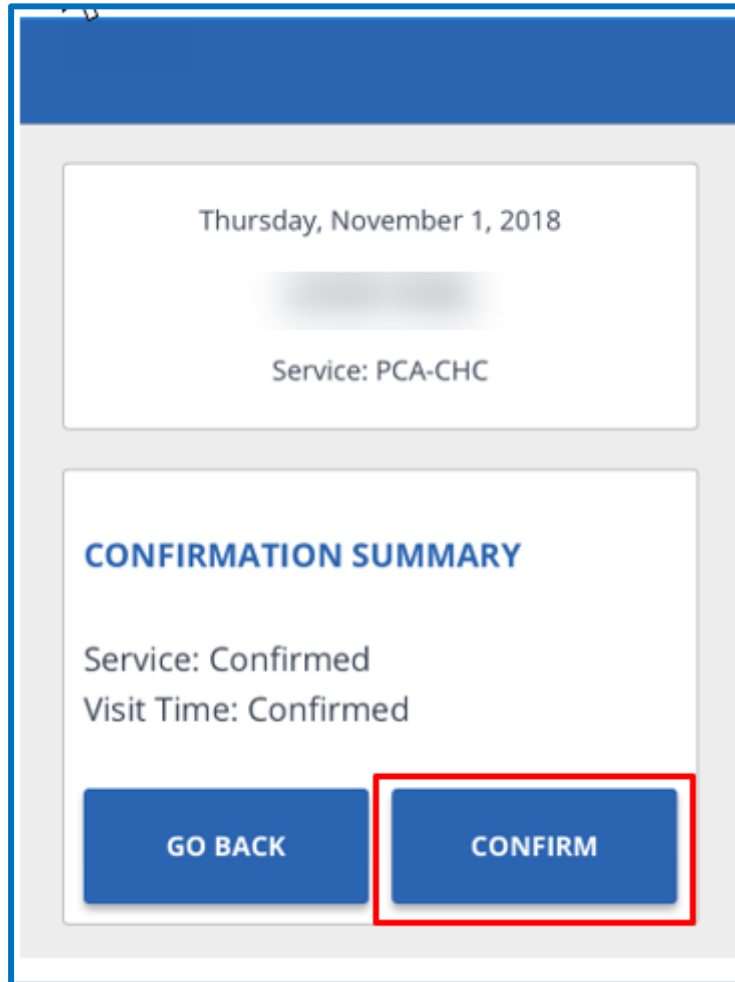
The client must tap either **CONFIRM** or **DENY** to approve or reject **Services** and **Visit Time**.

If they tap **DENY**, it means they do not agree the visit start and end times or the service(s) were performed.

- Tap **CONTINUE**

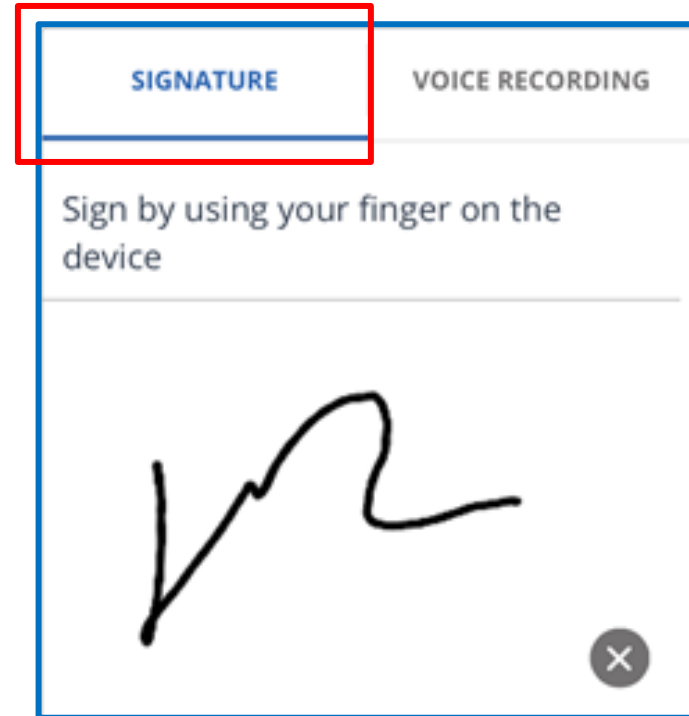
The screenshot shows a mobile application interface with a blue header. Below the header, there is a white box containing the date "Thursday, November 1, 2018" and the service name "Service: PCA-CHC". Below this, there is another white box containing the service name "Service: PCA-CHC" and two buttons: a blue "DENY" button and a grey "CONFIRM" button with a checkmark. Below this, there is a white box containing the visit time "Visit Time: 08:31 PM - 08:41 PM" and 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". Red arrows point from the text on the left to the "DENY" button for the service, the "CONFIRM" button for the visit time, and the "CONTINUE" button. A red arrow also points from the text on the right to the "CONFIRM" button for the visit time.

If employer taps **CONFIRM**, it means they agree the visit start and end times and service(s) were performed.





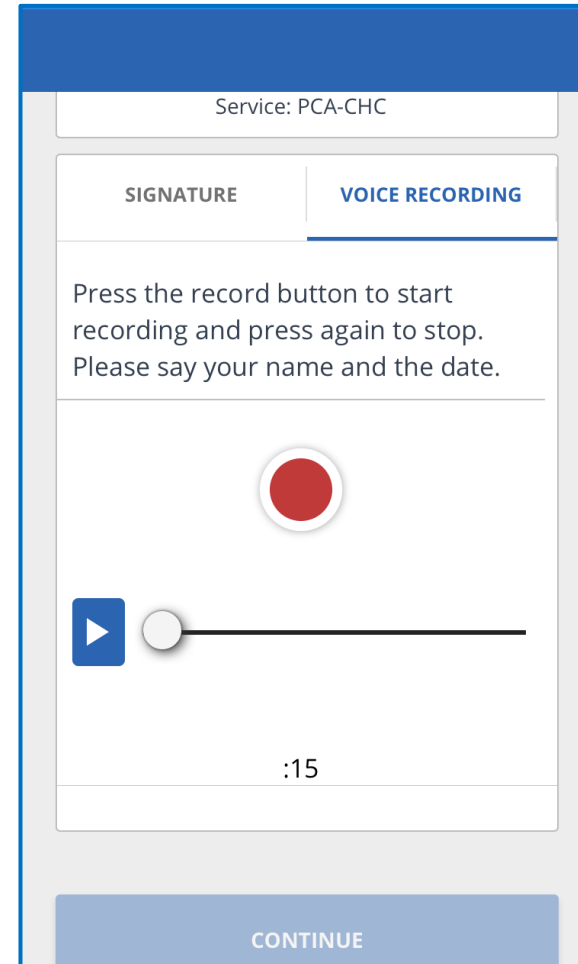
- Tap **CONFIRM**


- The client will tap either **SIGNATURE** or **VOICE RECORDING**.
- If the employee taps **SIGNATURE**, they will sign the device using a finger and tap **CONTINUE**.

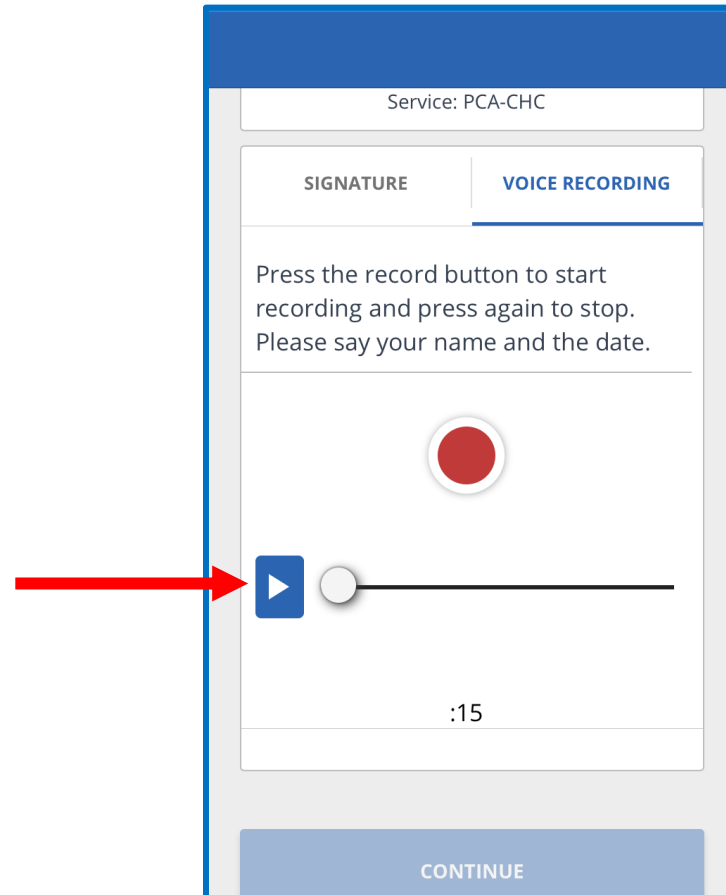


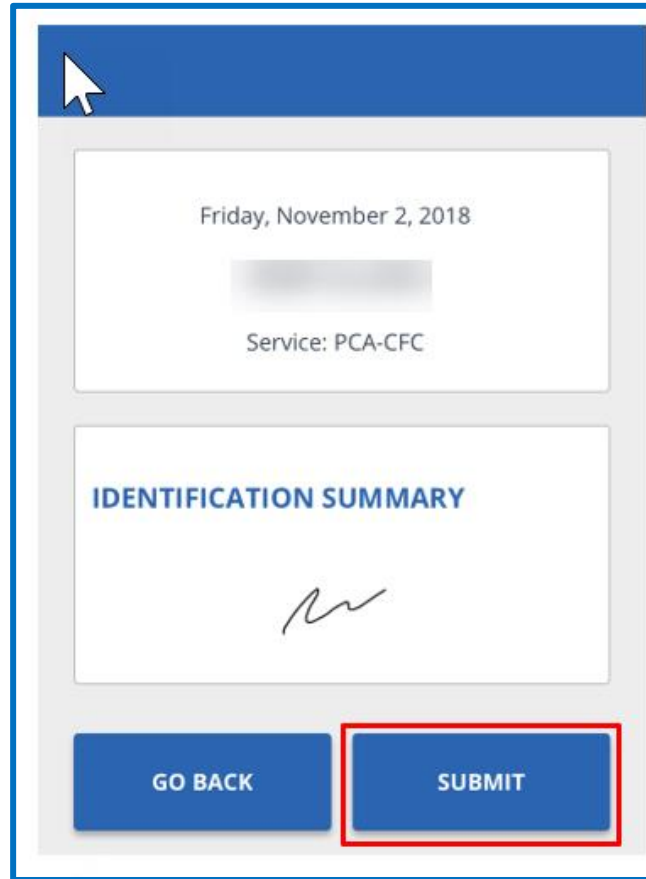
Tap  to clear the signature field and sign again.

- If the client taps the **VOICE RECORDING**, tap the Record  icon.
- Tap the Record  icon again to stop the recording.

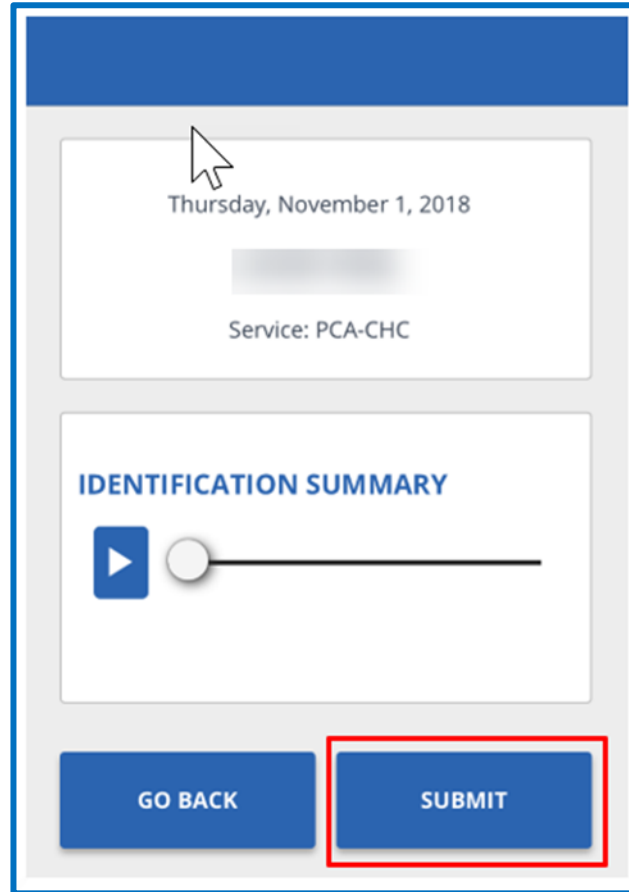


- Voice recordings can be a maximum of 15 seconds.
- Tap the Play  icon to play the recorded audio.

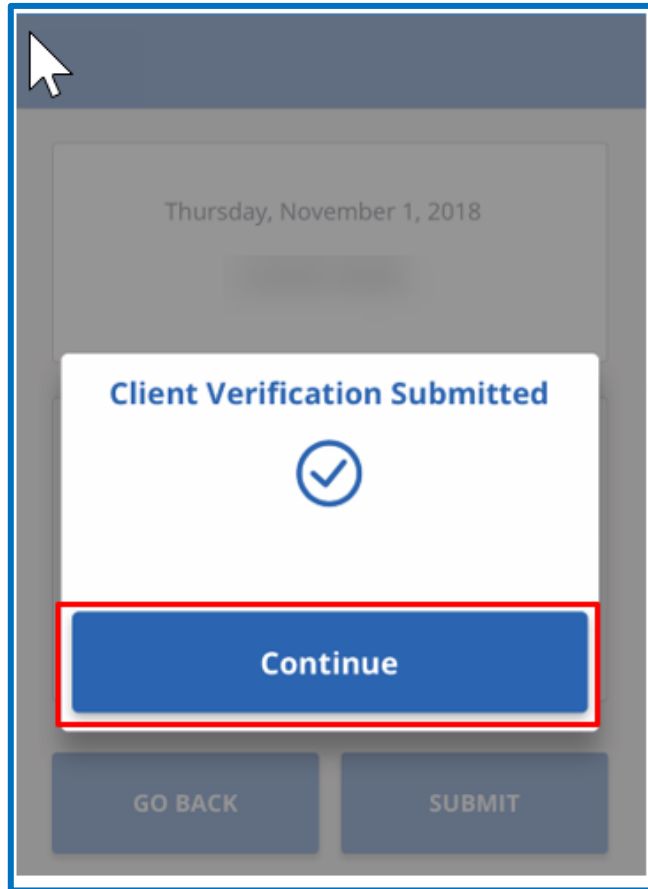




- Tap **SUBMIT** (Signature Confirmation)



- Tap **SUBMIT** (Voice Confirmation)



- Tap **CONTINUE**

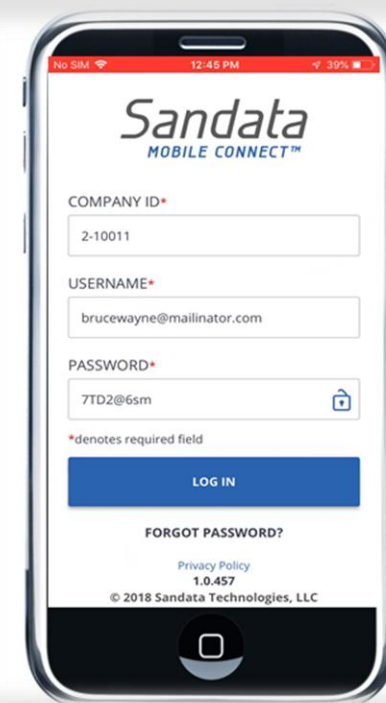
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SMC

DEMO VIDEO

* Client Verification



Questions

- Questions regarding the Sandata EVV system or for updates to mailing addresses, phone number, or email addresses contact: DDS.EVV@ct.gov



Thank You

Electronic Visit Verification by Sandata Technologies

