



SANDATA MOBILE CONNECT

Universal

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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



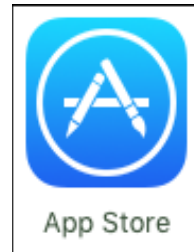
Warnings:

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.



Android – Google Play Store



iOS – App Store

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.

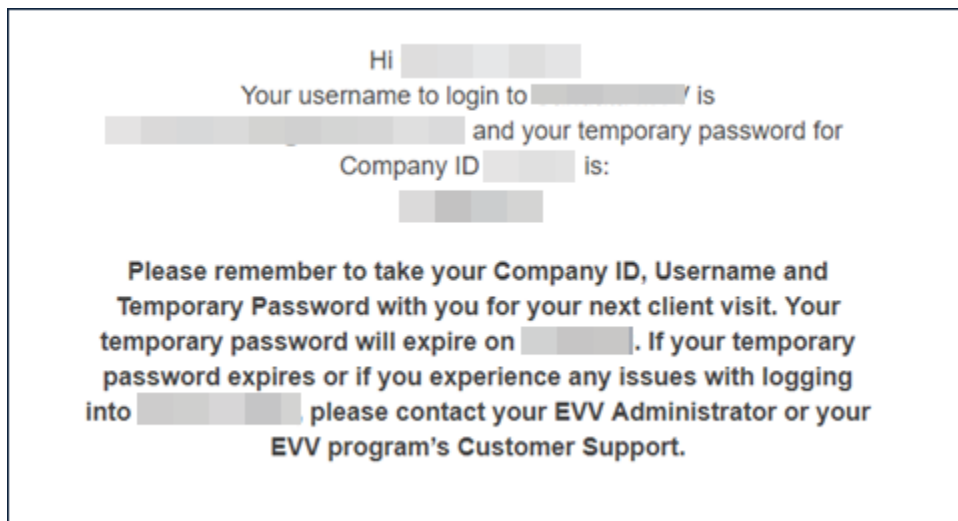
- Sandata Electronic Visit Verification users: Login using the employee's Santrax ID
- Sandata Agency Management users: Login using the employee's username

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.



Sample Temporary Password Email



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.

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)

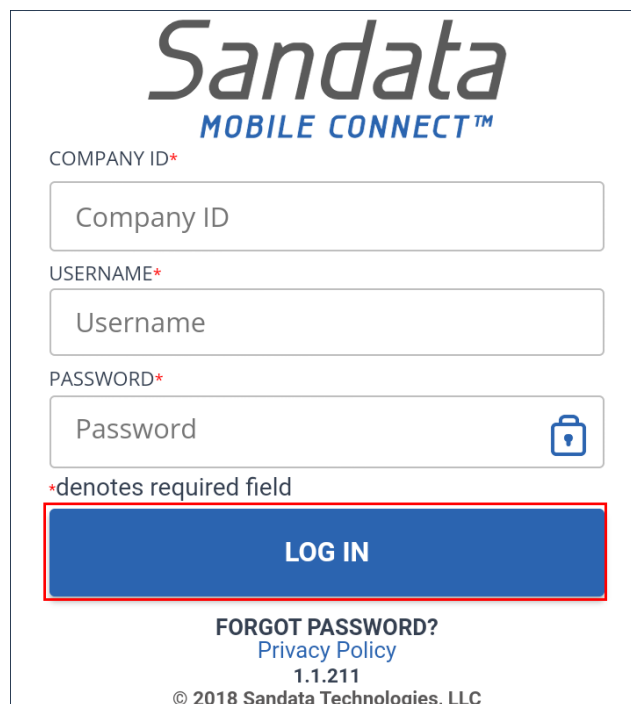
B. USERNAME - Username credentials change based on agency configuration.

- 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**.



The image shows the login screen for Sandata Mobile Connect. At the top is the Sandata MOBILE CONNECT logo. Below the logo are three input fields: 'COMPANY ID*' with a text box containing 'Company ID', 'USERNAME*' with a text box containing 'Username', and 'PASSWORD*' with a text box containing 'Password' and a lock icon. Below the password field is a red asterisk and the text '*denotes required field'. At the bottom of the form is a large blue button with the text 'LOG IN'. Below the button are the links 'FORGOT PASSWORD?' and 'Privacy Policy', the version number '1.1.211', and the copyright notice '© 2018 Sandata Technologies, LLC'.



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**.

SECURITY SETUP

Please fill out the following security questions for your account

Please select a security question

Select Security Question ▼

Please enter your answer

Answer

Please select a security question

Select Security Question ▼

Please enter your answer

Answer

NEXT

3. Enter and re-enter a new password.

Note:

Passwords 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.


PASSWORD SETUP

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

PASSWORD



CONFIRM NEW PASSWORD



CANCEL

SUBMIT

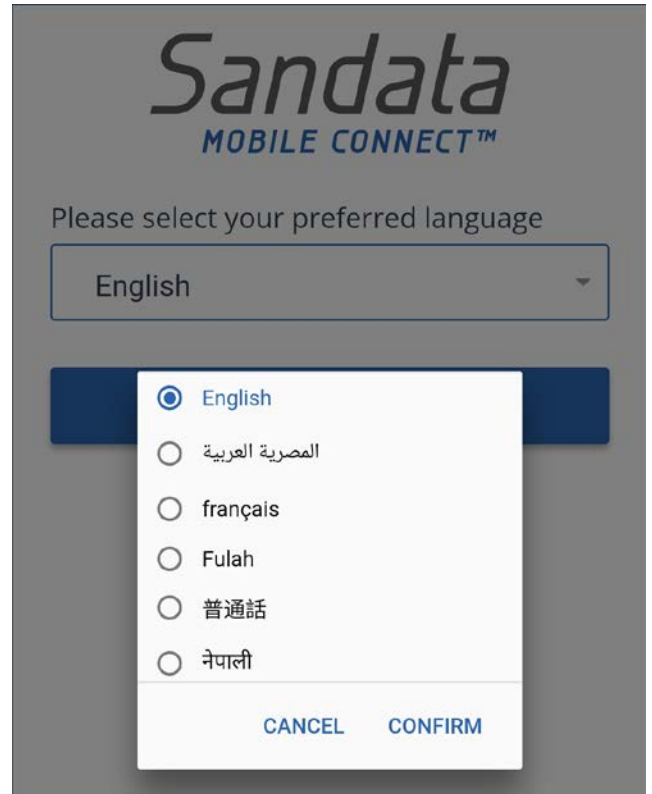
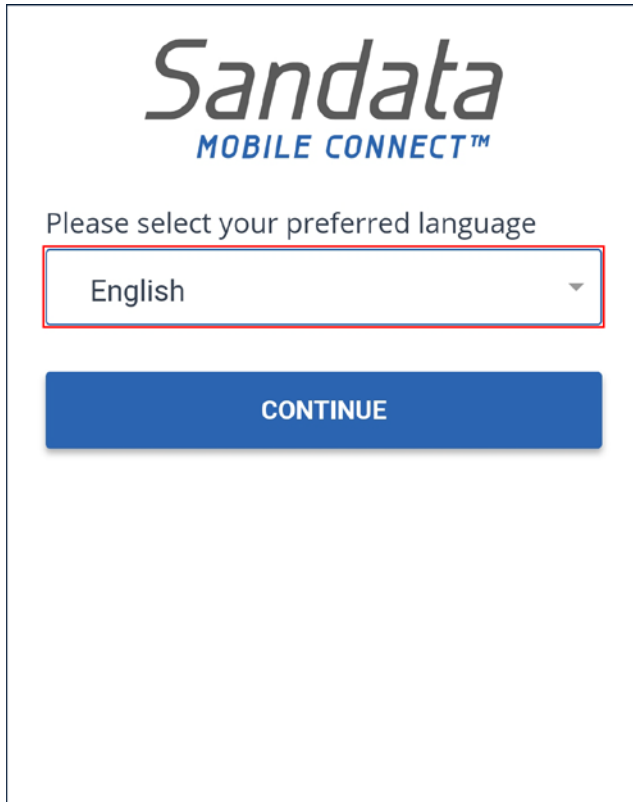
Note:

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.

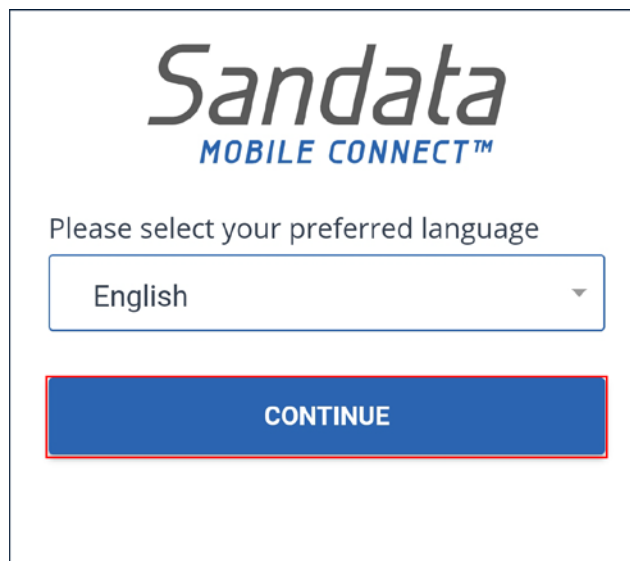


Language Select (Initial Log-in)

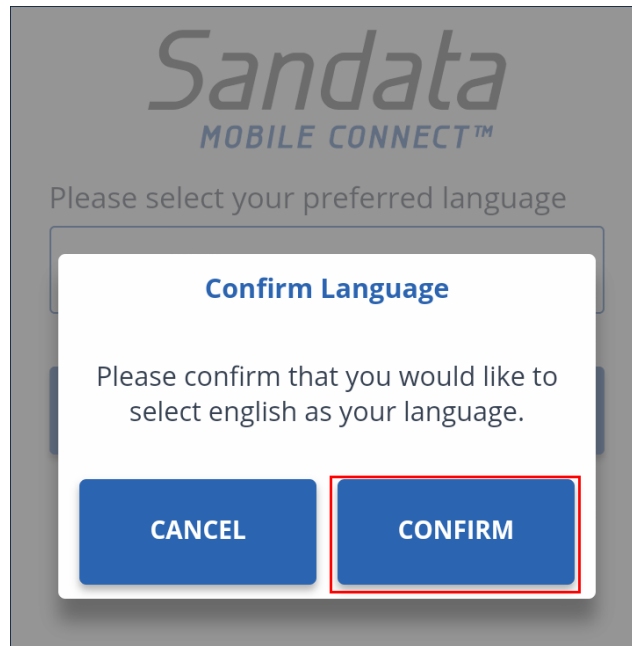
1. Tap the **Please select your preferred language** field
2. Select a language from the menu.
3. Tap **OK**.



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.

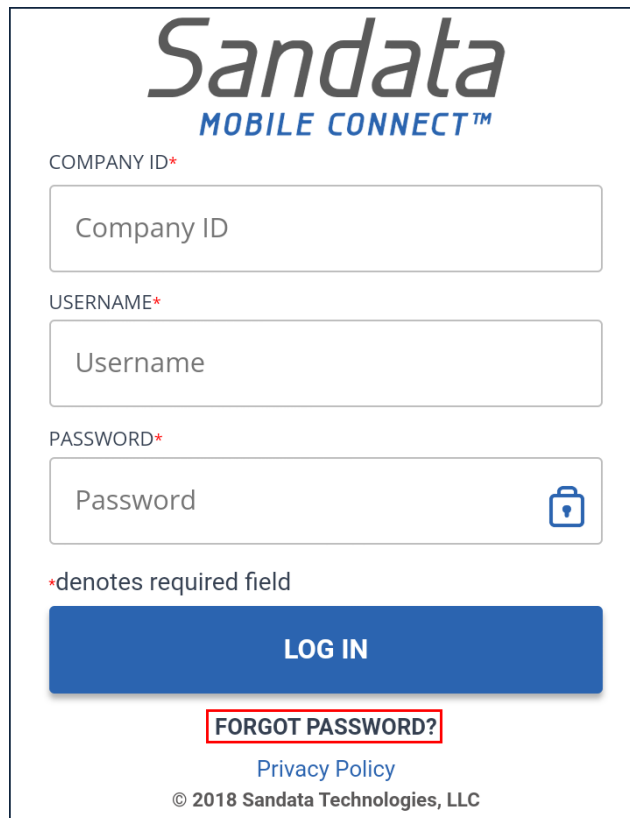


Note:

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?**.



The image shows a login screen for Sandata Mobile Connect. At the top is the Sandata MOBILE CONNECT logo. Below the logo are three input fields: 'COMPANY ID*' with a text box containing 'Company ID', 'USERNAME*' with a text box containing 'Username', and 'PASSWORD*' with a text box containing 'Password' and a lock icon. Below the fields is a note: '*denotes required field'. At the bottom is a large blue 'LOG IN' button, a red-bordered 'FORGOT PASSWORD?' link, a 'Privacy Policy' link, and the copyright notice '© 2018 Sandata Technologies, LLC'.

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?

In what city did your mother and father meet?

CANCEL **CONTINUE**

5. Enter and re-enter a new password.
6. Tap **RESET**.

RESET PASSWORD

Enter your new password and confirm it

NEW PASSWORD

RE-ENTER NEW 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

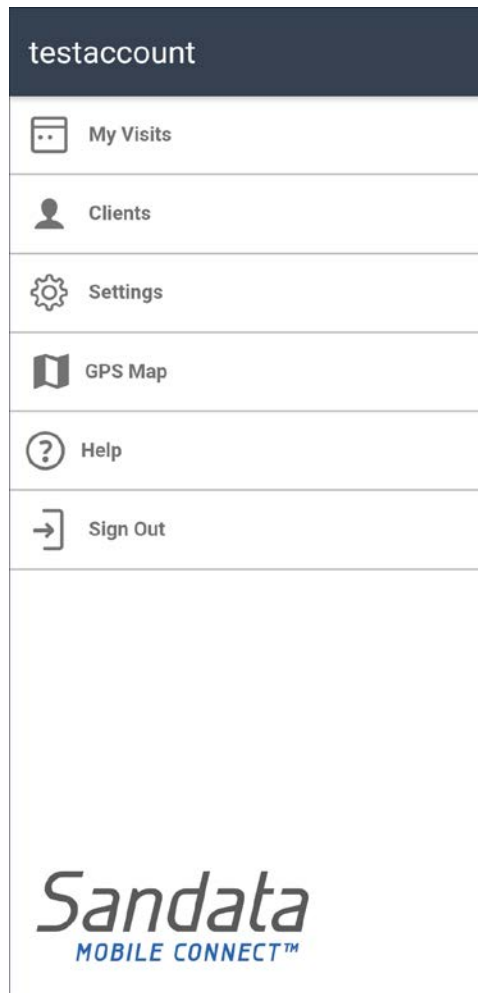
1. **Menu Button** - Displays the navigation menu.
2. **Sign Out** - Logs the user out of the application and displays the log-in screen.

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

Setting	Description
Language	English
Change Password	Indicates the selected language and allows the user to change the preferred language.
Application Timeout	5 Minutes
Change Password	Allows user to manually change the password.
Idle Warning	2 Minutes
Application Timeout	Indicates the amount of time the application can remain idle before the user is timed out.
Client Identifier(s)	Client Id Enabled
Idle Warning	Indicates the amount of time the application can remain idle before displaying an idle warning.
Client Identifier(s)	Last Name Disabled
Client Identifier(s)	(Client ID): Indicates whether the user has the ability to search for a client by client ID.
Unknown Visit	Enabled
Client Identifier(s)	(Last Name): Indicates whether the user has the ability to search for a client by last name.
Service Selection	Enabled
Unknown Visit	Indicates whether the user has unknown visit functionality enabled.
Service Selection	Required
Service Selection	Indicates whether users can select a service.
Visit Notes	Enabled
Service Selection	Indicates whether the user is required to select a service prior to starting a visit.
Visit Notes	Optional
Visit Notes	Indicates whether the account is configured for visit notes.
Abandon Visit	Enabled
Visit Notes	Indicates whether the account is configured to require visit notes.
Past Visits	1 Day(s)
Abandon Visit	Indicates whether the user has the functionality to abandon a visit once it is started.
Future Visits	5 Day(s)
Past Visit	Indicates the length of time visits will remain on the PAST tab.
Auto Close Visit	24 Hour(s)
Future Visits	Indicates how many days of scheduled visits display on the UPCOMING tab
Location Required	Enabled
Auto Close Visit	Indicates the amount of time that can pass before a visit is automatically abandoned by the application.
Check In Only	Disabled
Location Required	Indicates whether location services are must be enabled to use the application.
Auto Update	Disabled
Check In Only	Indicates that the users are only required to start a visit.
Client Search	Enabled
Auto Update	Indicates that the account is set up to automatically receive application updates.
Client Search	Indicates whether the account has Client Search functionality enables.

My Visits Screen

Upcoming

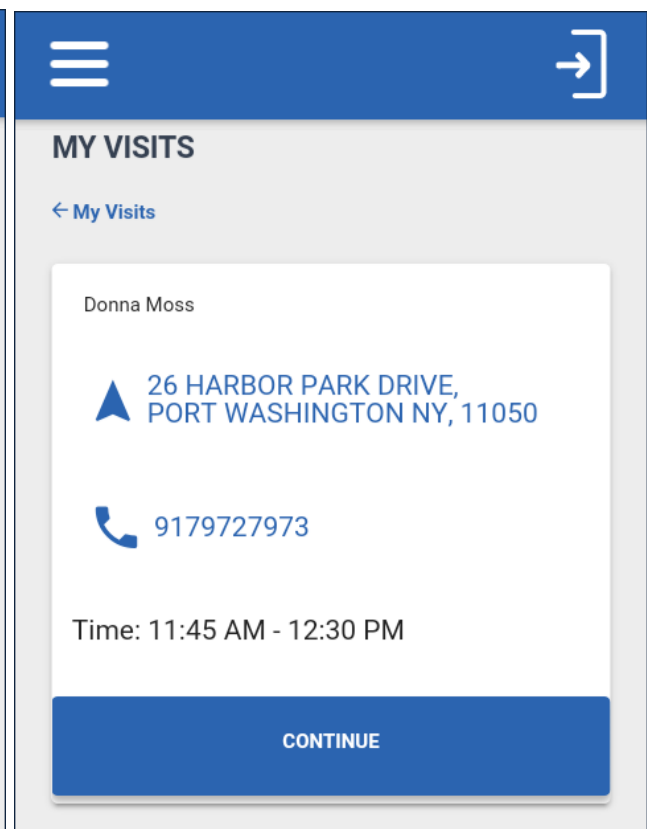
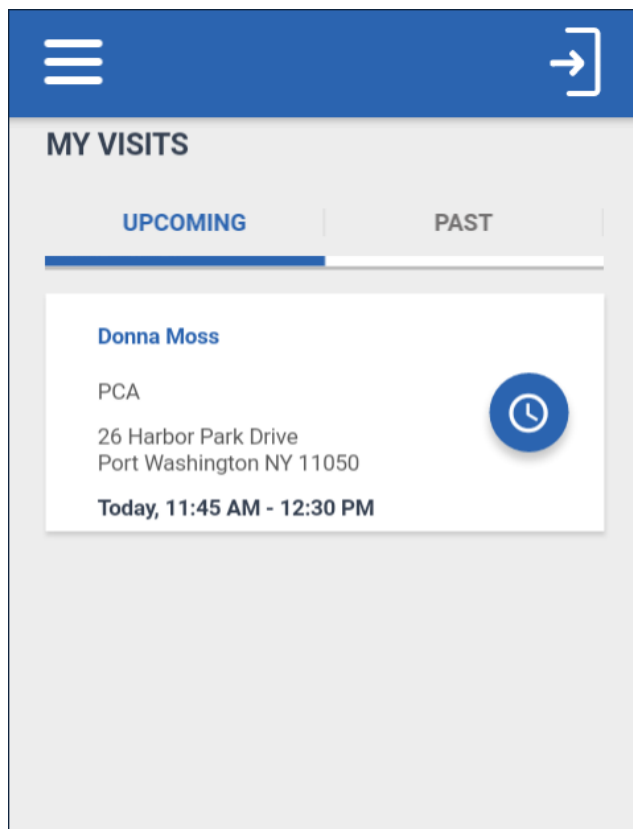
The UPCOMING tab displays a list of upcoming (scheduled) visits. Visits are sorted by start time in descending order with the earliest visit appearing first.

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.



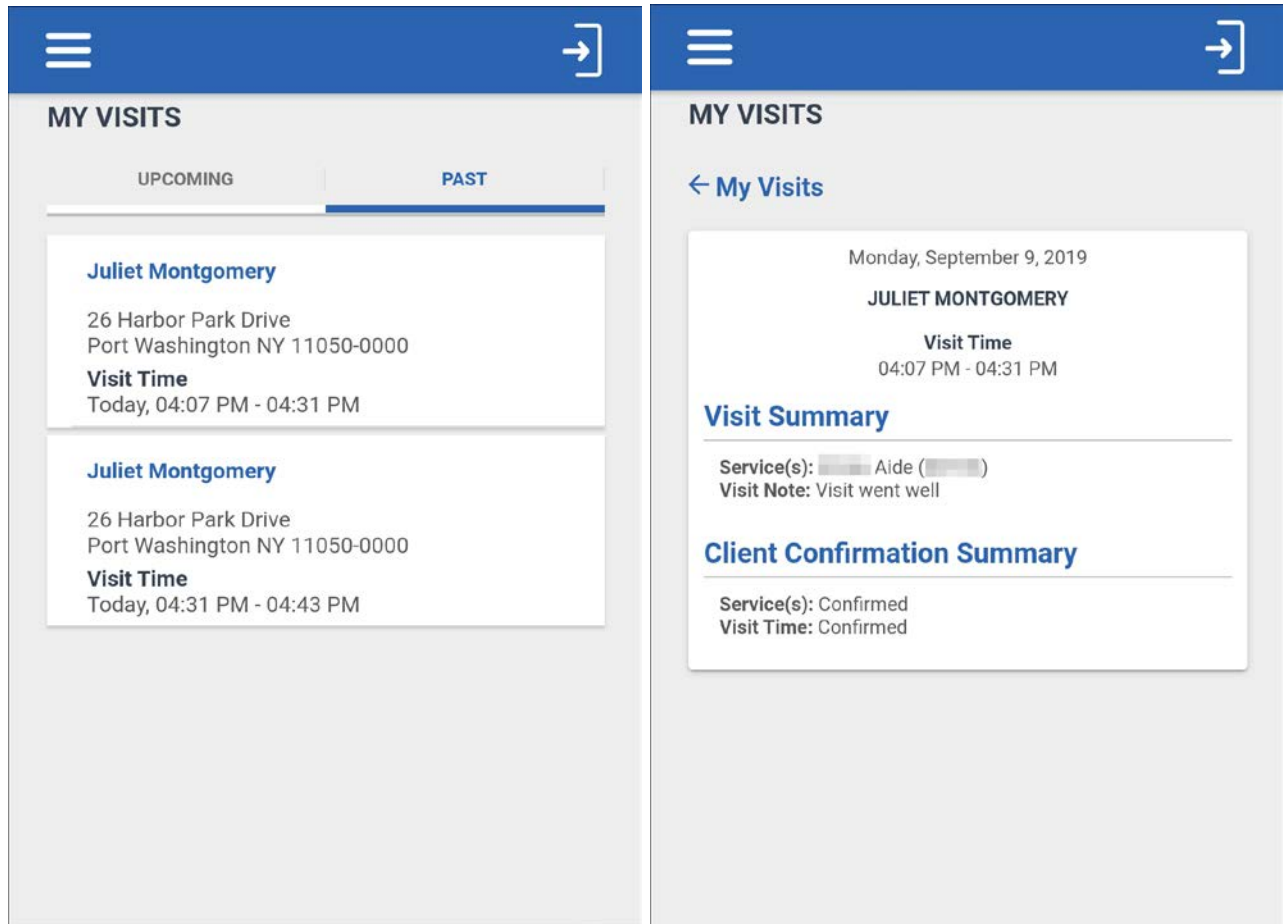
Note:

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



Past

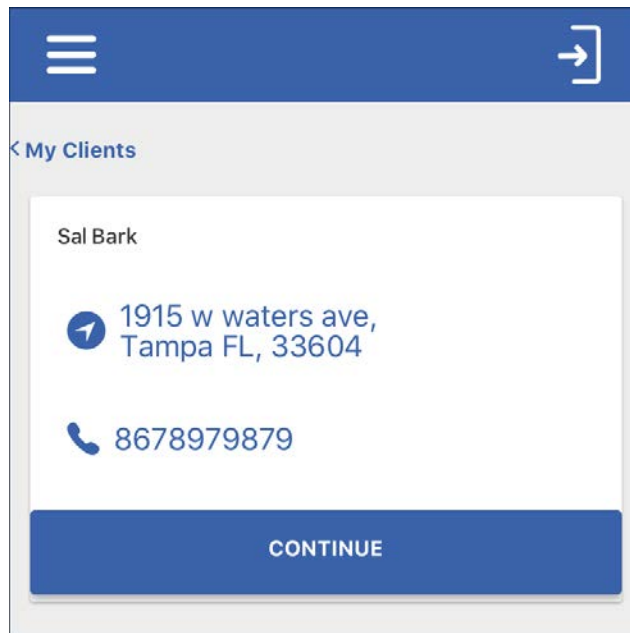
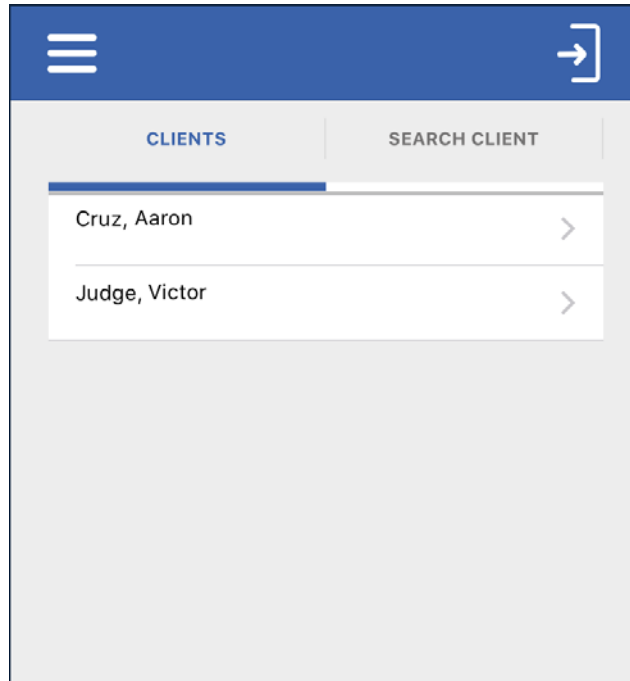
The PAST tab displays visits that occurred within an agency/payer defined timeframe. Tap visit from the list on the PAST tab to display a visit details screen. The defined time is visible in the Past Visits field on the Settings screen.



Clients Screen

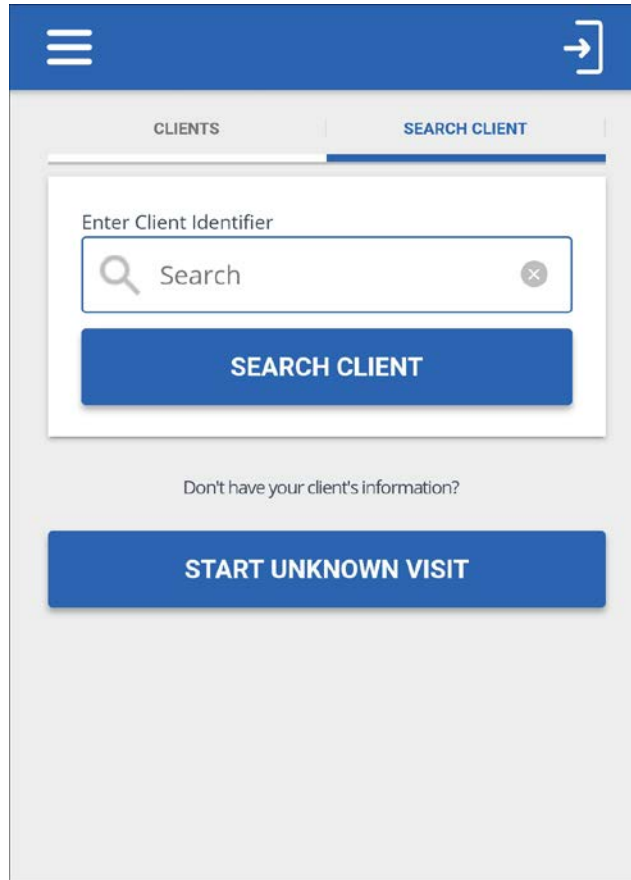
Clients

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.



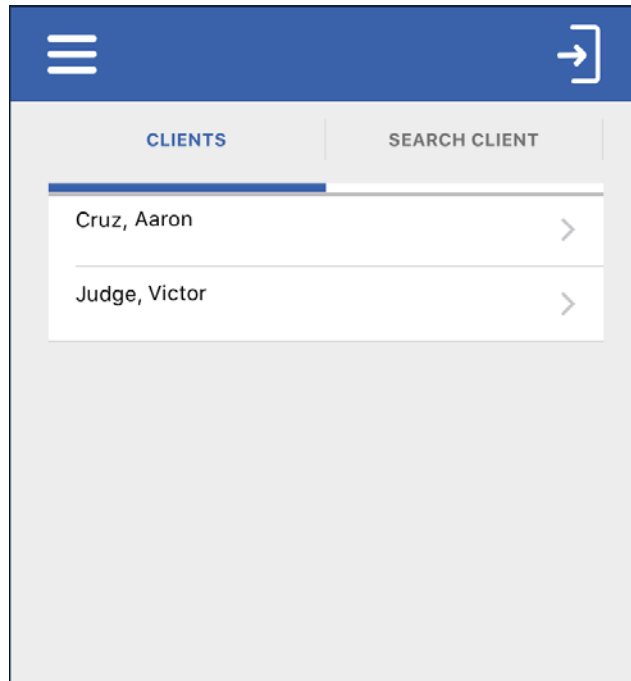
Starting a Visit

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

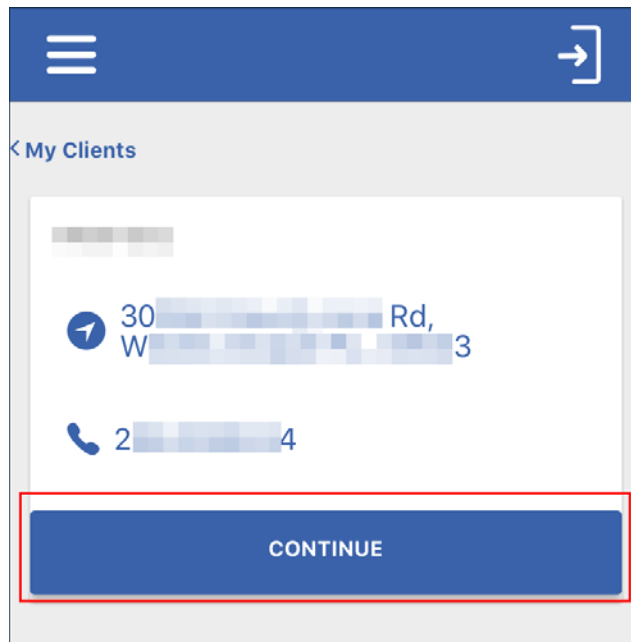
Starting a Visit (Clients Tab)

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

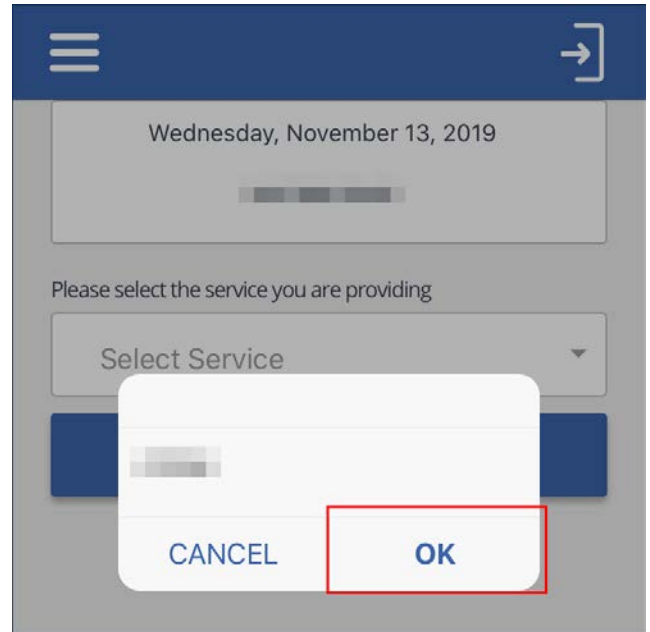
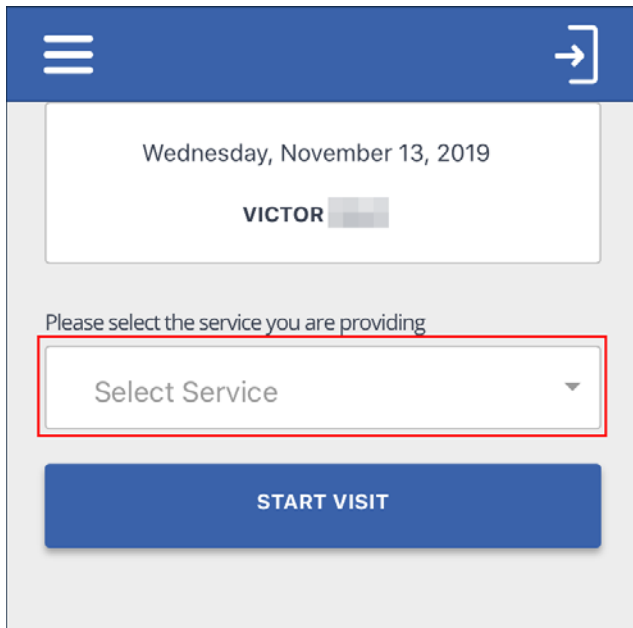
1. Tap a client from the list.



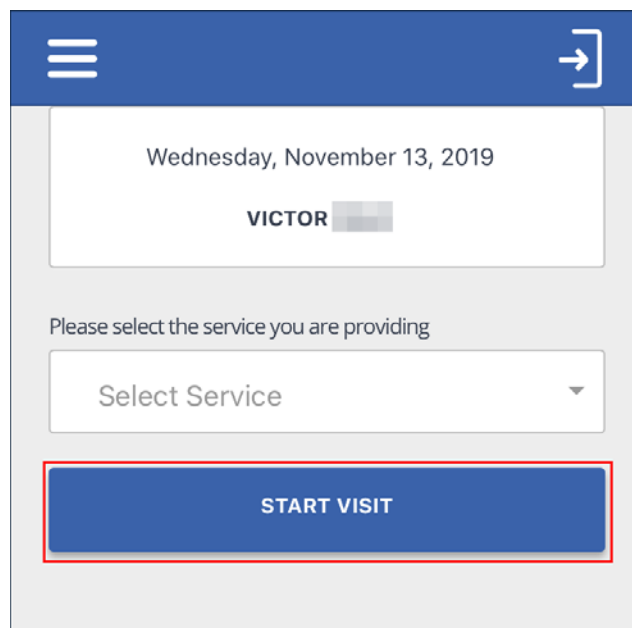
2. Tap **CONTINUE**.



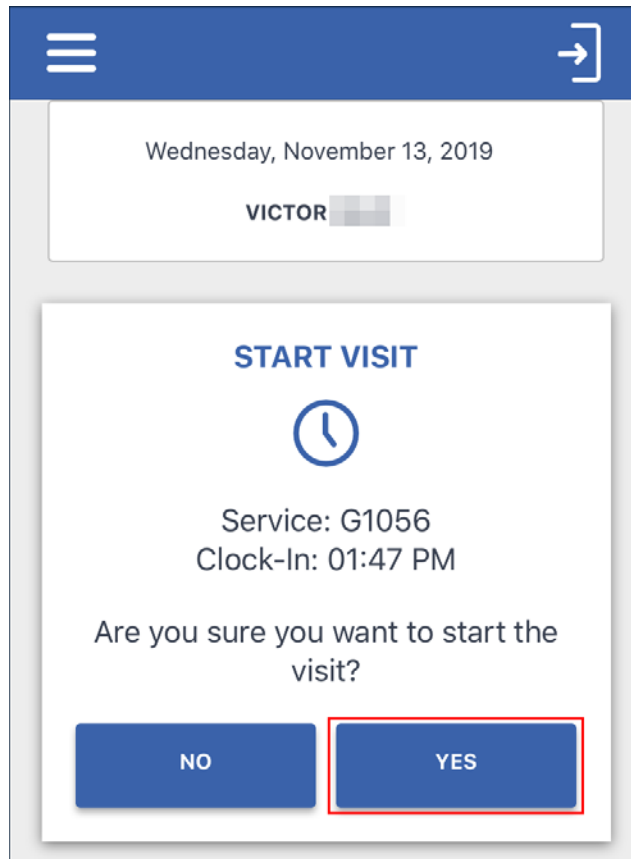
3. Tap the **Select Service** field as applicable.
4. Select a service from the list.
5. Tap **OK**



6. Tap **START VISIT**.



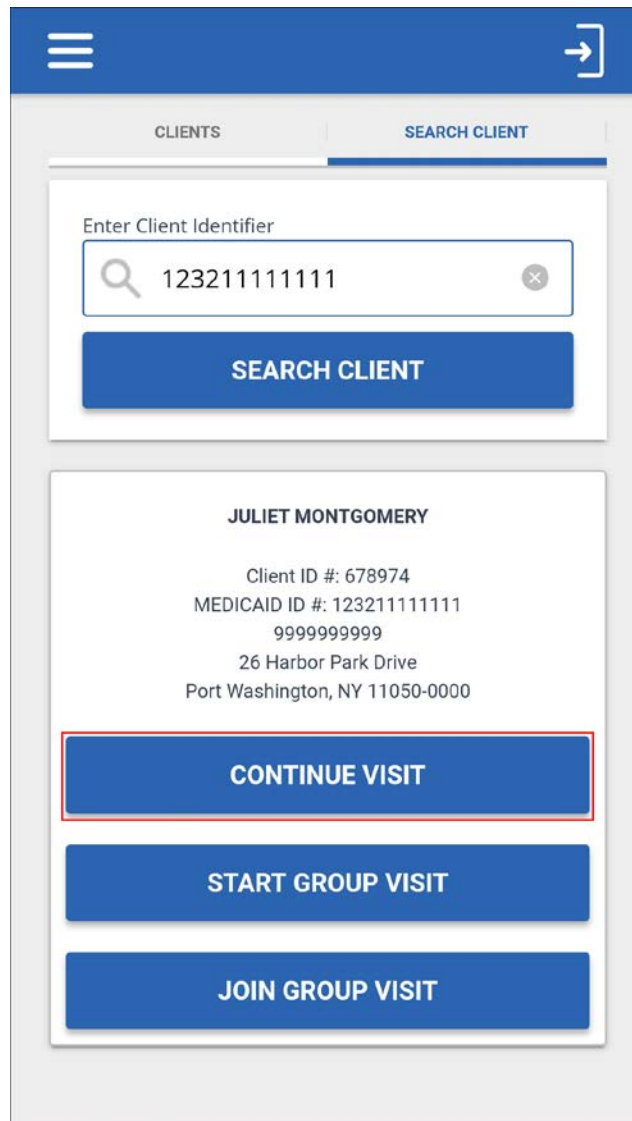
7. Tap **YES** to start the visit.



Starting a Visit from the Search Client tab (Known Client)

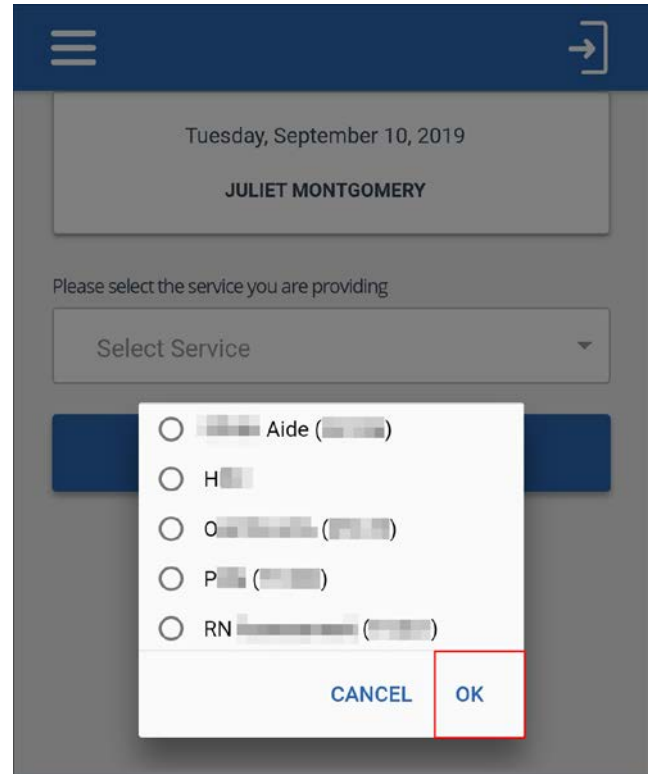
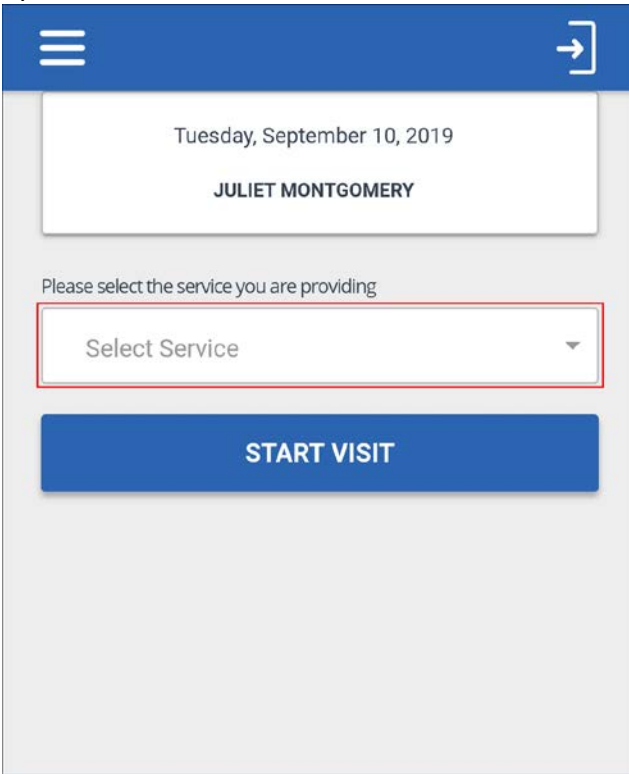
Navigate to the **SEARCH CLIENT** tab and follow the instructions to start a visit.

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

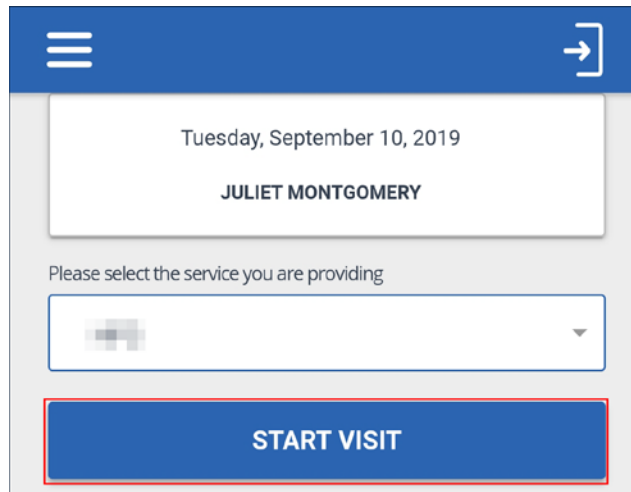


The screenshot displays the 'SEARCH CLIENT' tab in the Sandata Mobile Connect app. At the top, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. Below the tabs is a search input field labeled 'Enter Client Identifier' containing the text '123211111111'. A magnifying glass icon is on the left of the input field, and a close icon is on the right. Below the input field is a blue button labeled 'SEARCH CLIENT'. Below this button is a card for a client named 'JULIET MONTGOMERY'. The card contains the following information: 'Client ID #: 678974', 'MEDICAID ID #: 123211111111 9999999999', and '26 Harbor Park Drive Port Washington, NY 11050-0000'. Below the card are three blue buttons: 'CONTINUE VISIT', 'START GROUP VISIT', and 'JOIN GROUP VISIT'. The 'CONTINUE VISIT' button is highlighted with a red rectangular border.

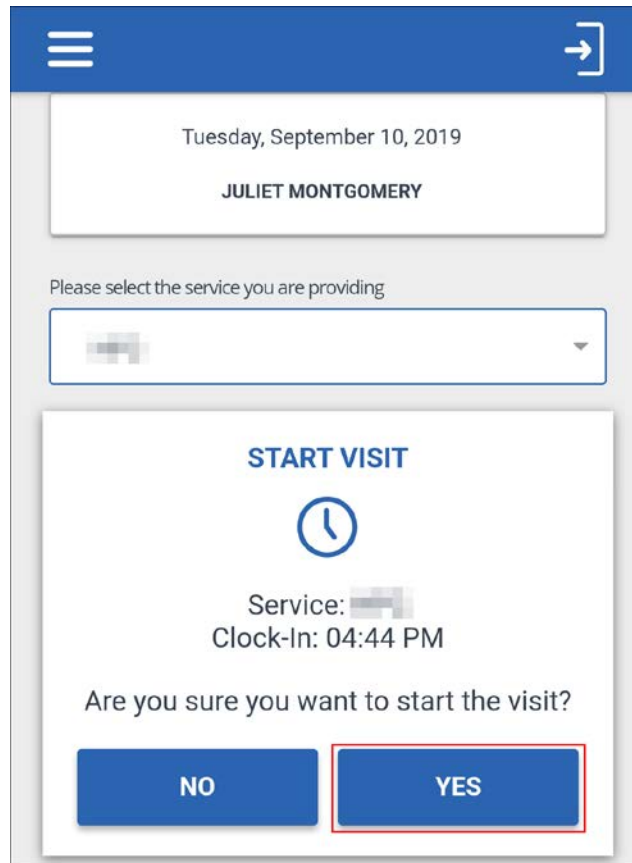
4. Tap the **Select Service** field
5. Select a service from the list.
6. Tap **OK**.



7. Tap **START VISIT**.



8. Tap **YES** to start the visit.

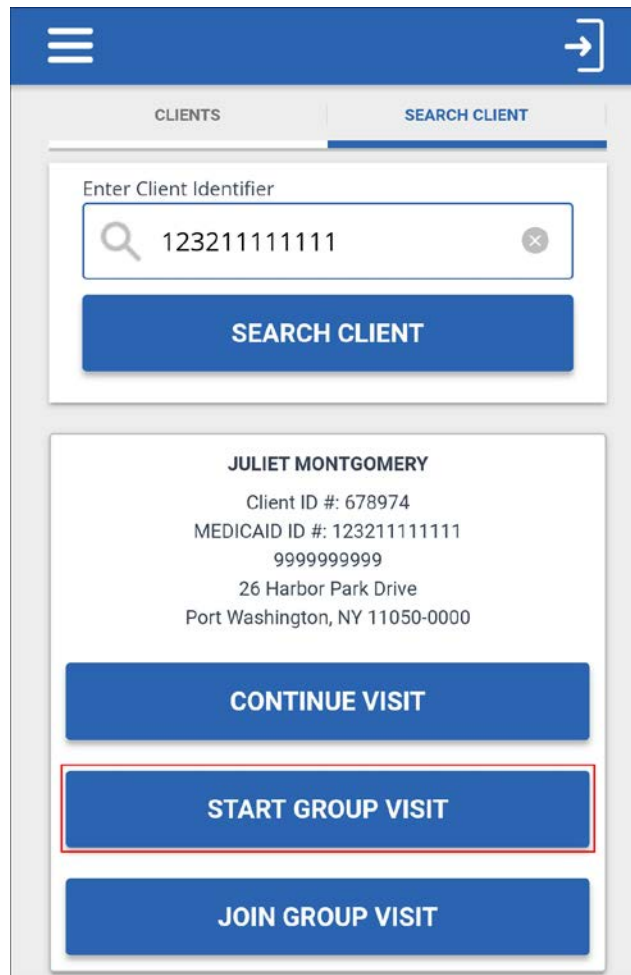


The screenshot shows a mobile application interface for starting a visit. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. Below the header, a white box displays the date "Tuesday, September 10, 2019" and the name "JULIET MONTGOMERY". Underneath, a prompt says "Please select the service you are providing" followed by a dropdown menu. The main content area is a white card with the text "START VISIT" and a clock icon. Below the icon, it shows "Service: [redacted]" and "Clock-In: 04:44 PM". A question asks "Are you sure you want to start the visit?". At the bottom of the card are two blue buttons: "NO" and "YES". The "YES" button is highlighted with a red border.

Group Visits

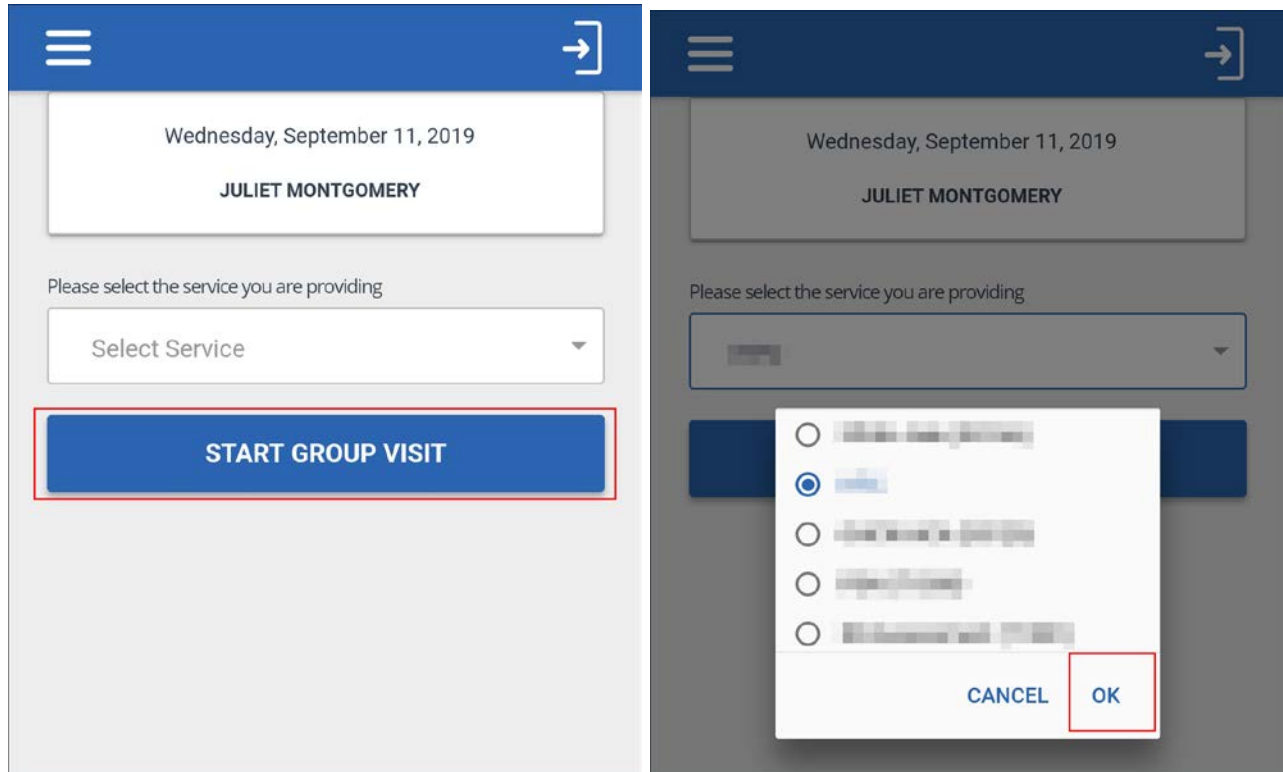
Group Visit functionality allows multiple employees to provide services for two or more individual clients. A group visit is defined as visits for two or more individual clients, linked by a shared group visit code. A group visit code is a unique value assigned to each visit that occurred as part of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

1. Tap **START GROUP VISIT**.

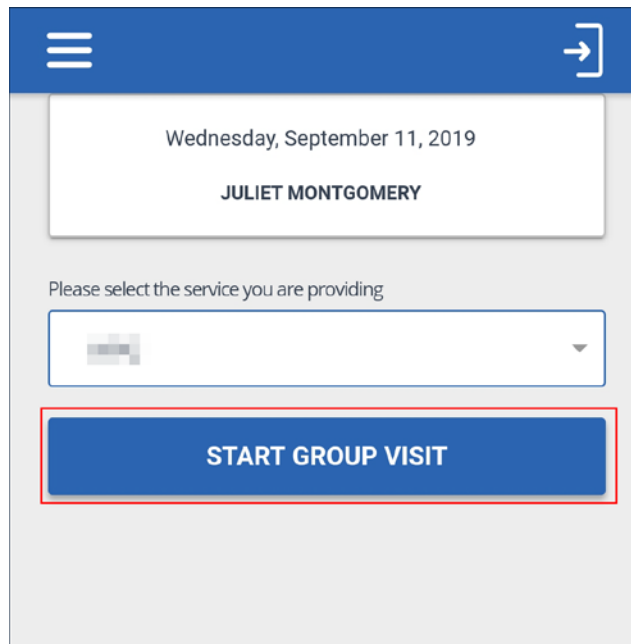


The screenshot shows the 'SEARCH CLIENT' interface. At the top, there are navigation icons (hamburger menu and back arrow). Below are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. The 'SEARCH CLIENT' tab is active. It contains a search input field labeled 'Enter Client Identifier' with a magnifying glass icon and a clear button (X). The input field contains the text '123211111111'. Below the input field is a blue button labeled 'SEARCH CLIENT'. Below this is a client profile card for 'JULIET MONTGOMERY' with the following details: Client ID #: 678974, MEDICAID ID #: 123211111111 9999999999, and address: 26 Harbor Park Drive, Port Washington, NY 11050-0000. Below the profile card are three blue buttons: 'CONTINUE VISIT', 'START GROUP VISIT' (which is highlighted with a red border), and 'JOIN GROUP VISIT'.

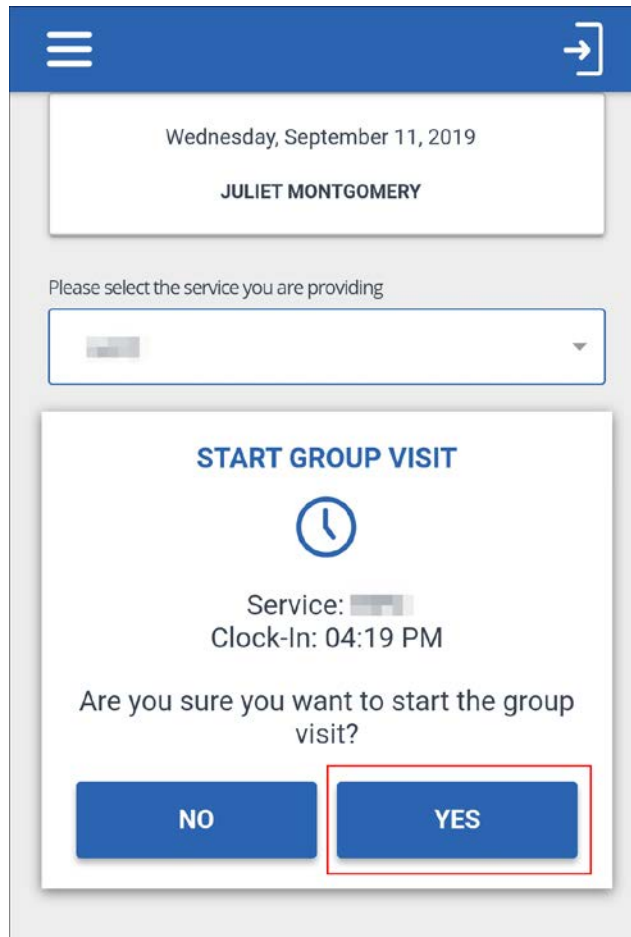
2. Tap the **Select Service** field.
3. Select a service from the list.
4. Tap **OK**.



5. Tap **START GROUP VISIT**.



6. Tap **YES** to start the group visit.



Wednesday, September 11, 2019

JULIET MONTGOMERY

Please select the service you are providing

START GROUP VISIT

Service: [redacted]

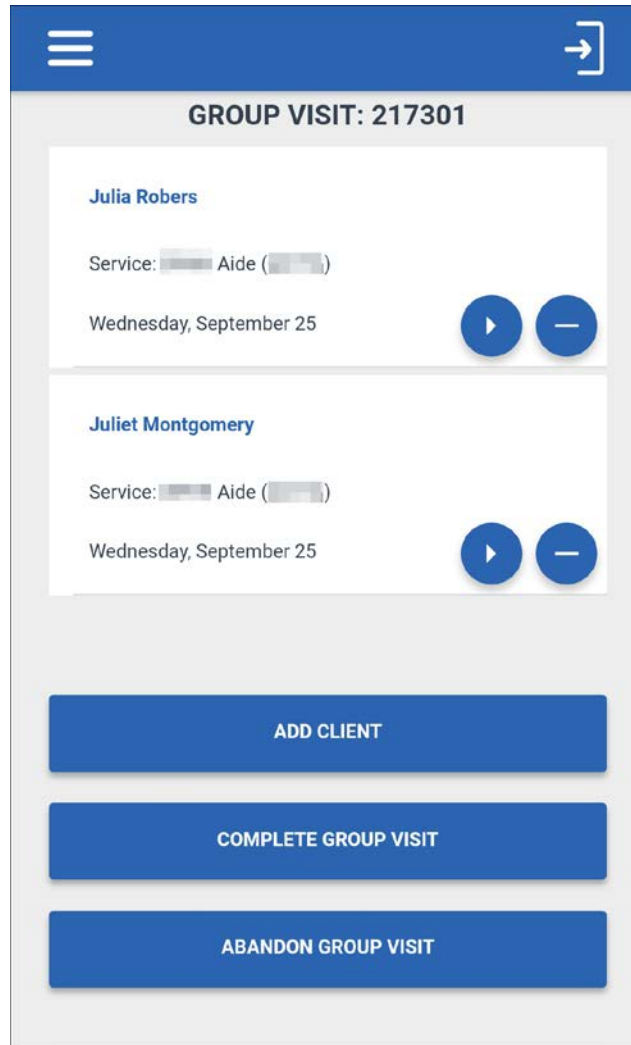
Clock-In: 04:19 PM

Are you sure you want to start the group visit?

NO YES

Group Visit screen

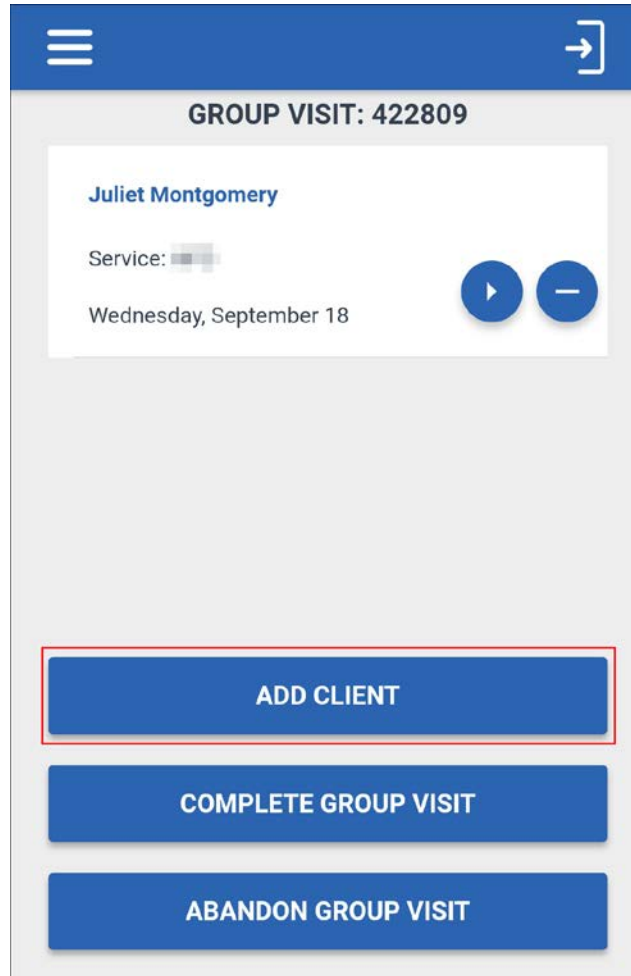
The Group Visit screen displays the group visit code and allows users to manage group visits. On this screen, users can add additional clients to the group visit, complete or abandon visits for individual clients and complete or abandon all visits they are attending as part of the group visit. To complete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



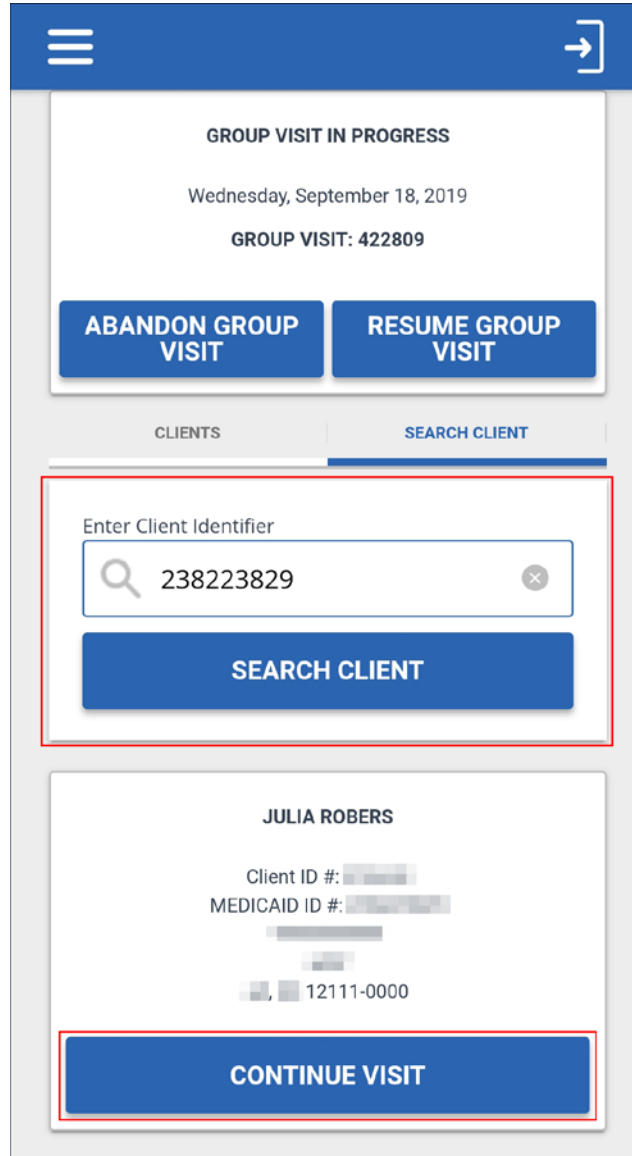
Adding a Client to a Group Visit

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

4. Tap **ADD CLIENT**



5. Search for a client.
6. Click **CONTINUE VISIT**.

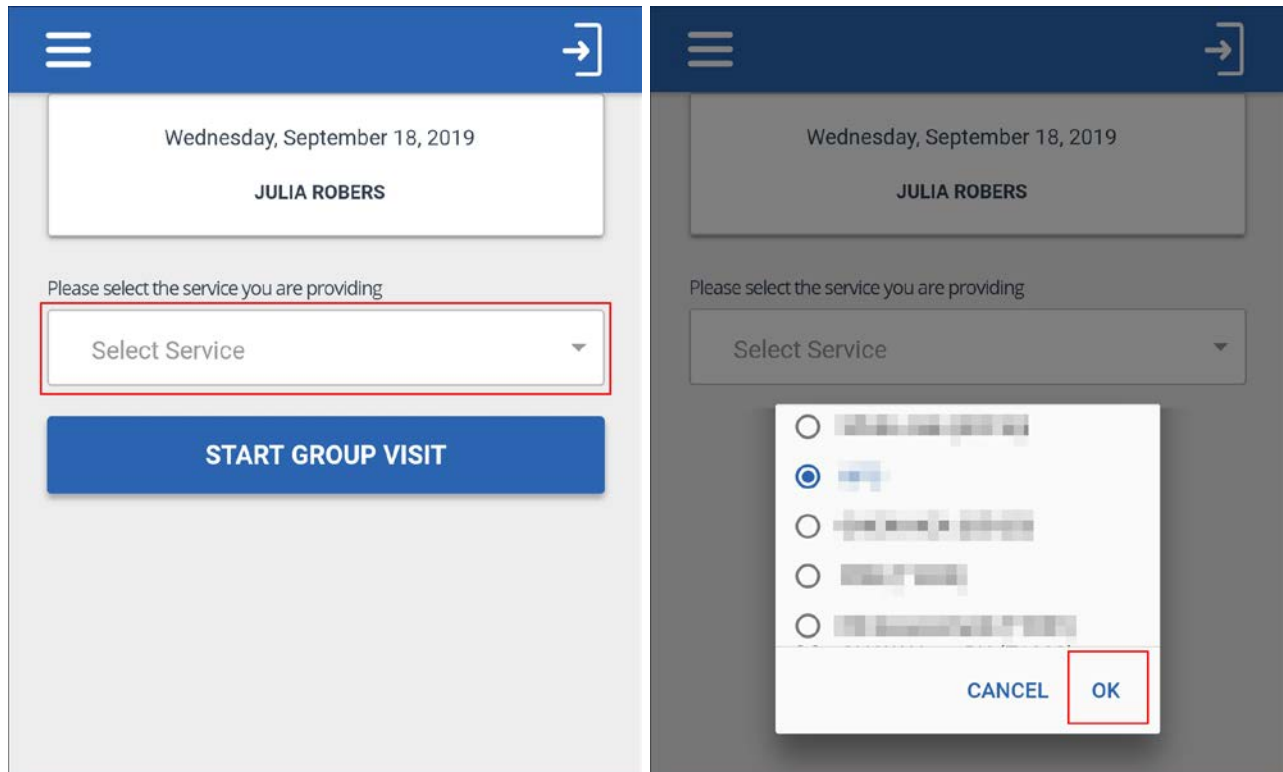


The screenshot displays the Sandata Mobile Connect app interface. At the top, a blue header contains a menu icon on the left and a back arrow on the right. Below the header, a white card displays the following information: "GROUP VISIT IN PROGRESS", "Wednesday, September 18, 2019", and "GROUP VISIT: 422809". Below this card are two blue buttons: "ABANDON GROUP VISIT" and "RESUME GROUP VISIT".

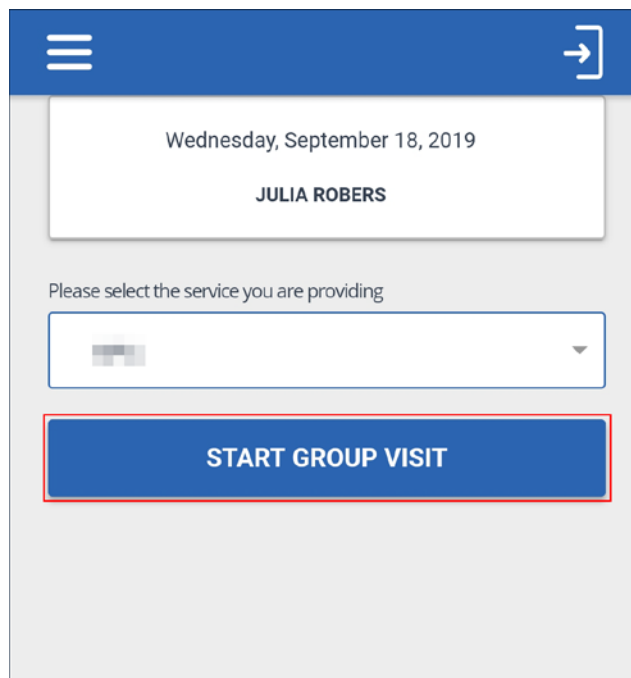
Below the buttons are two tabs: "CLIENTS" and "SEARCH CLIENT". The "SEARCH CLIENT" tab is selected and highlighted in blue. Below the tabs is a search form with a red border. The form contains the text "Enter Client Identifier" above a search input field. The input field contains the number "238223829" and a magnifying glass icon on the left and a close icon on the right. Below the input field is a blue button labeled "SEARCH CLIENT".

Below the search form is another white card displaying the client information for "JULIA ROBERS". The card shows "Client ID #:" followed by a blurred ID number, "MEDICAID ID #:" followed by a blurred ID number, and "12111-0000" at the bottom. Below this card is a blue button labeled "CONTINUE VISIT", which is highlighted with a red border.

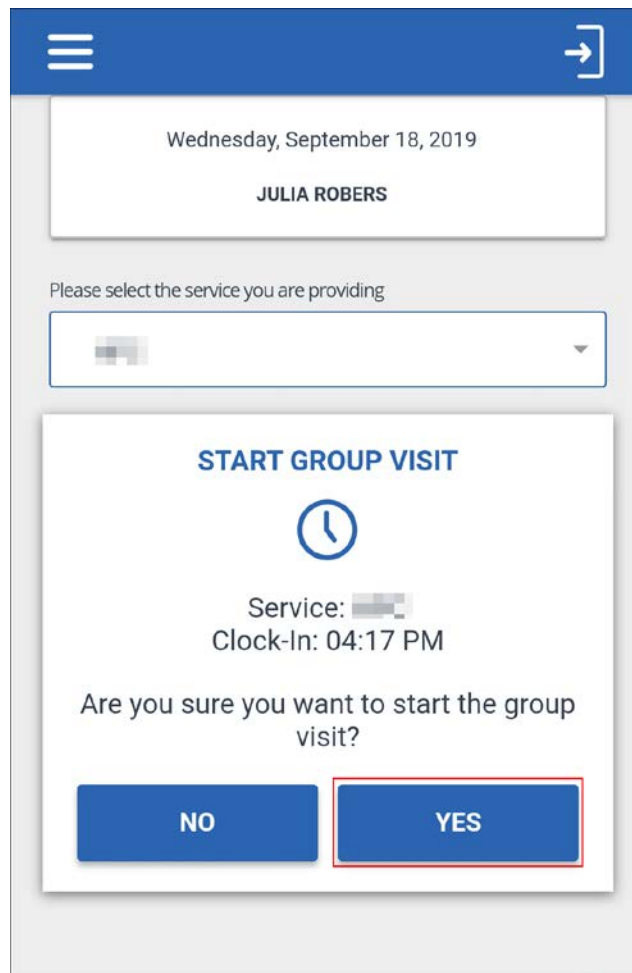
7. Tap the **Select Service** field.
8. Select a service from the list.
9. Tap **OK**.



10. Tap **START GROUP VISIT**.



11. Tap **YES**.

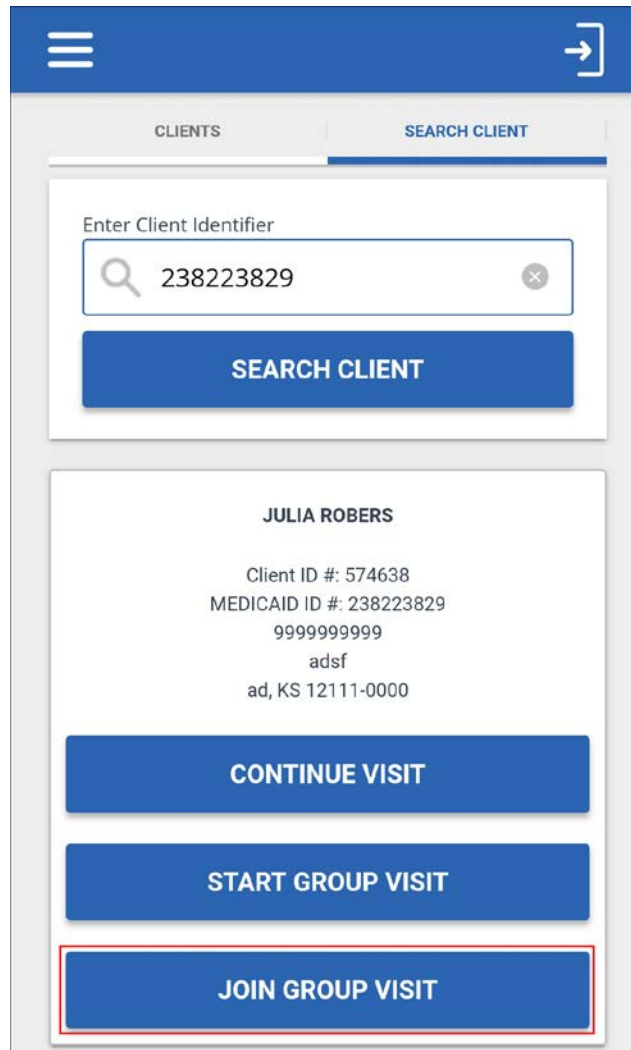


The screenshot shows a mobile application interface. At the top, there is a blue header bar with a hamburger menu icon on the left and a right-pointing arrow icon on the right. Below the header, a white box displays the date "Wednesday, September 18, 2019" and the name "JULIA ROBERS". Underneath, a prompt says "Please select the service you are providing" followed by a dropdown menu with a blurred selection. The main content area features a white card with the title "START GROUP VISIT" and a clock icon. Below the icon, it shows "Service: [blurred]" and "Clock-In: 04:17 PM". A question asks "Are you sure you want to start the group visit?". At the bottom of the card are two blue buttons: "NO" and "YES". The "YES" button is highlighted with a red rectangular border.

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.

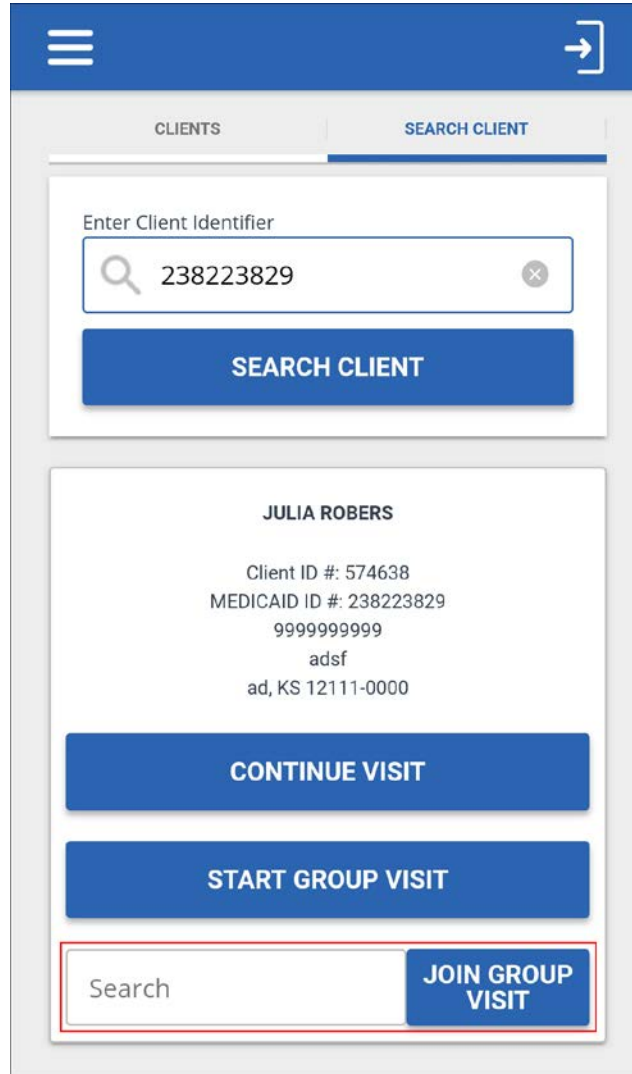
4. Tap **JOIN GROUP VISIT**.



The screenshot shows the 'SEARCH CLIENT' interface. At the top, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. Below the tabs is a search bar labeled 'Enter Client Identifier' containing the text '238223829'. A magnifying glass icon is on the left, and a close icon is on the right. Below the search bar is a blue button labeled 'SEARCH CLIENT'. Underneath, the client profile for 'JULIA ROBERS' is displayed, including 'Client ID #: 574638', 'MEDICAID ID #: 238223829', '9999999999', 'adsf', and 'ad, KS 12111-0000'. At the bottom, there are three blue buttons: 'CONTINUE VISIT', 'START GROUP VISIT', and 'JOIN GROUP VISIT'. The 'JOIN GROUP VISIT' button is highlighted with a red border.

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.



CLIENTS SEARCH CLIENT

Enter Client Identifier

238223829

SEARCH CLIENT

JULIA ROBERS

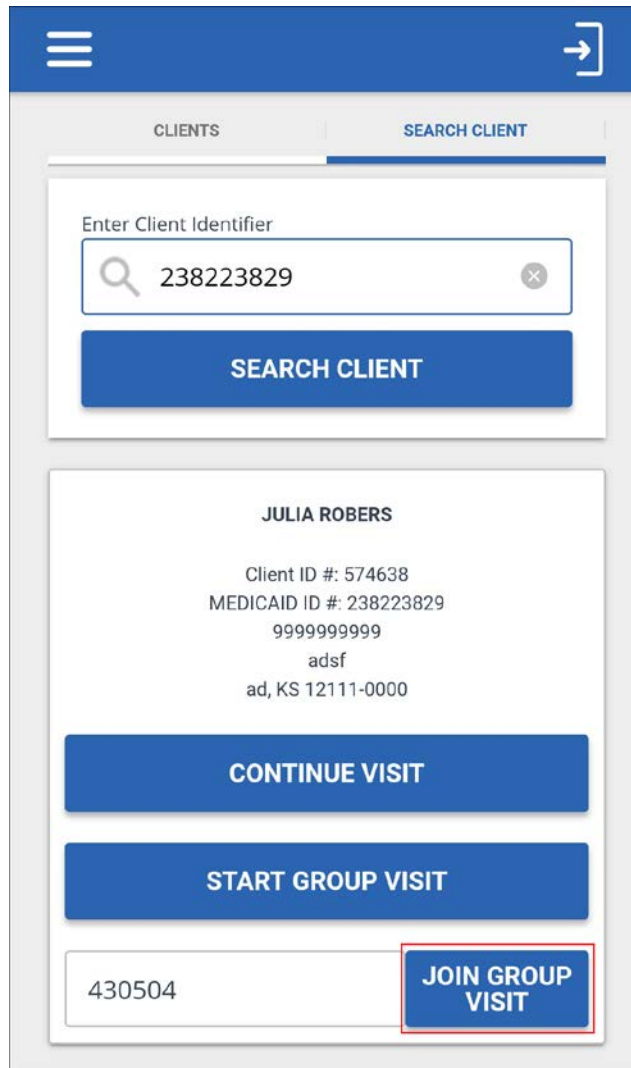
Client ID #: 574638
MEDICAID ID #: 238223829
9999999999
adsf
ad, KS 12111-0000

CONTINUE VISIT

START GROUP VISIT

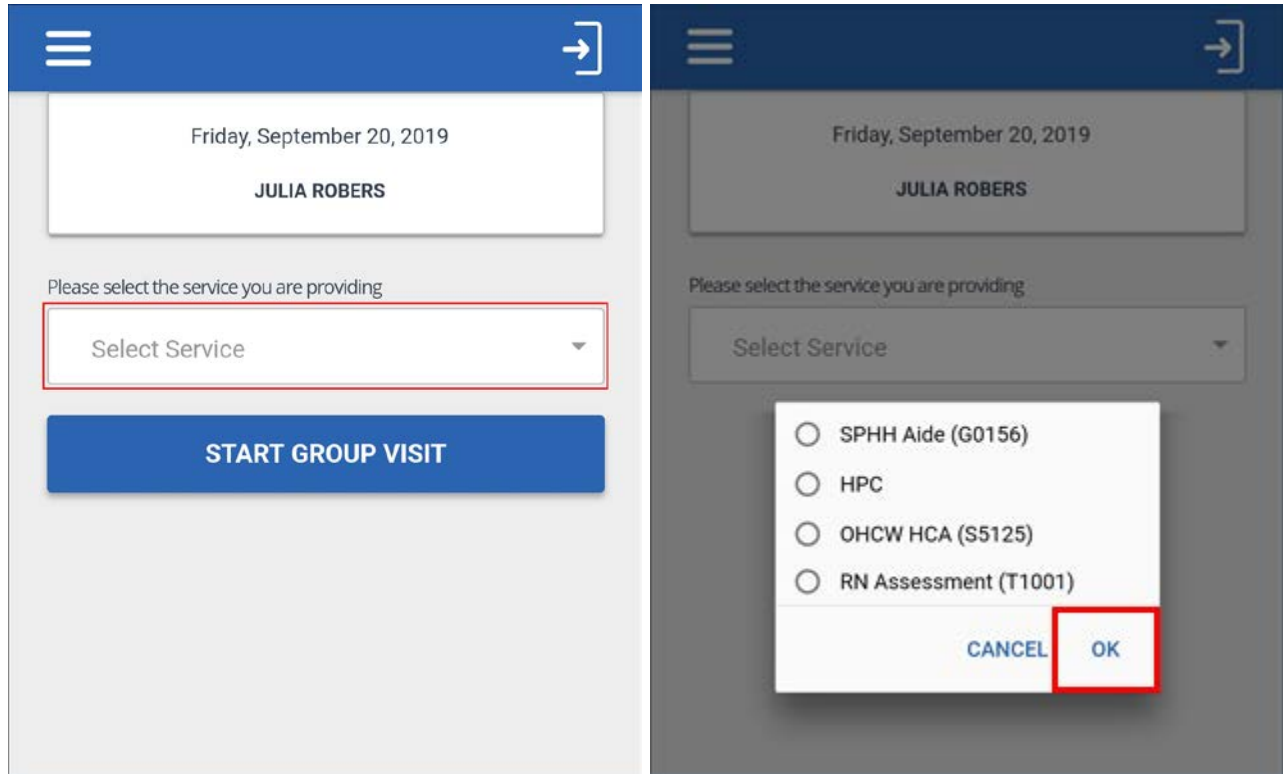
Search JOIN GROUP VISIT

6. Tap **JOIN GROUP VISIT**.

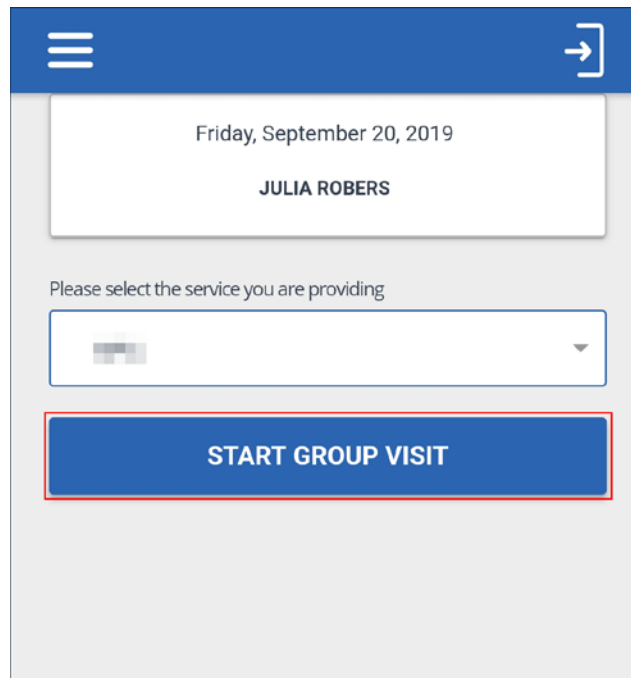


The screenshot shows the 'SEARCH CLIENT' interface. At the top, there are tabs for 'CLIENTS' and 'SEARCH CLIENT'. Below the tabs is a search bar labeled 'Enter Client Identifier' containing the text '238223829'. A blue button labeled 'SEARCH CLIENT' is positioned below the search bar. The search results display the name 'JULIA ROBERS' and the following information: Client ID #: 574638, MEDICAID ID #: 238223829, 9999999999, adsf, and ad, KS 12111-0000. Below this information are two blue buttons: 'CONTINUE VISIT' and 'START GROUP VISIT'. At the bottom of the screen, there is a white input field containing the number '430504' and a blue button labeled 'JOIN GROUP VISIT' which is highlighted with a red rectangular border.

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



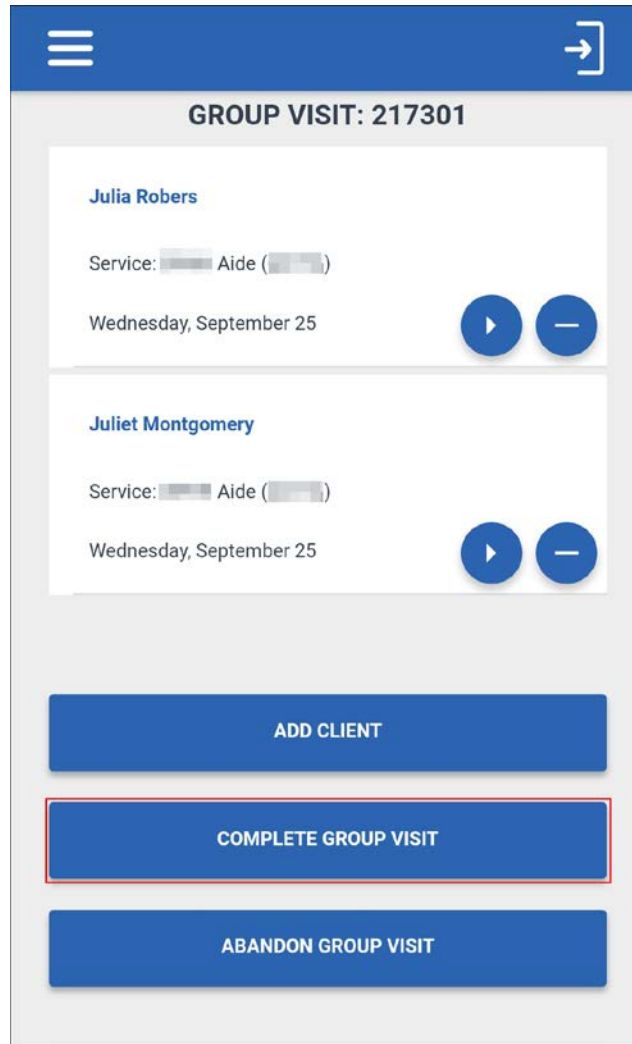
7. Tap **START GROUP VISIT**.



Completing a Group Visit

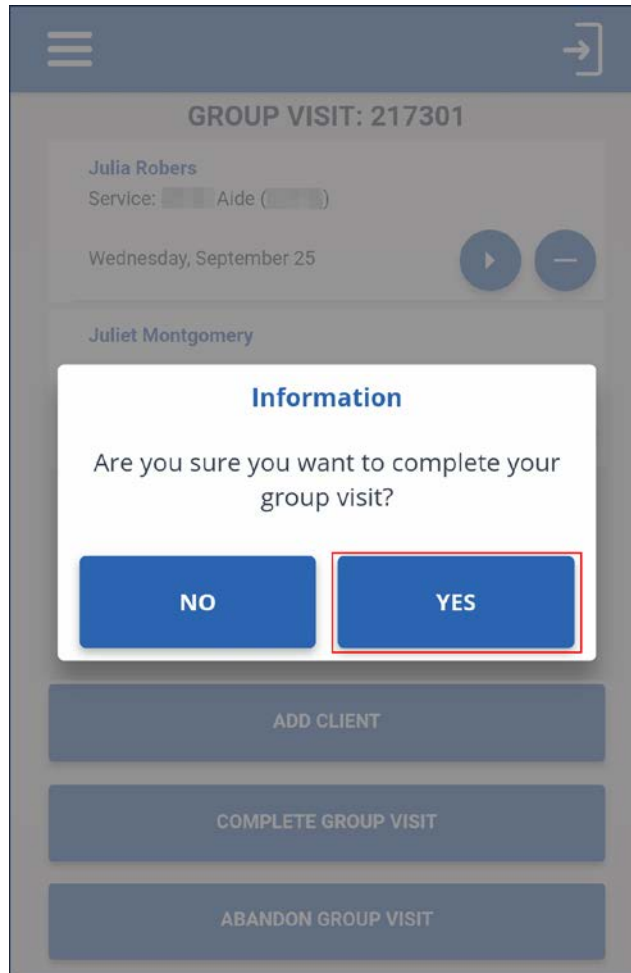
Employees can complete visits for all clients on the group at once, but the group visit remains active until each employee has completed all visits for all clients associated with that group visit.

4. Tap **COMPLETE GROUP VISIT**.



5. Tap **YES**

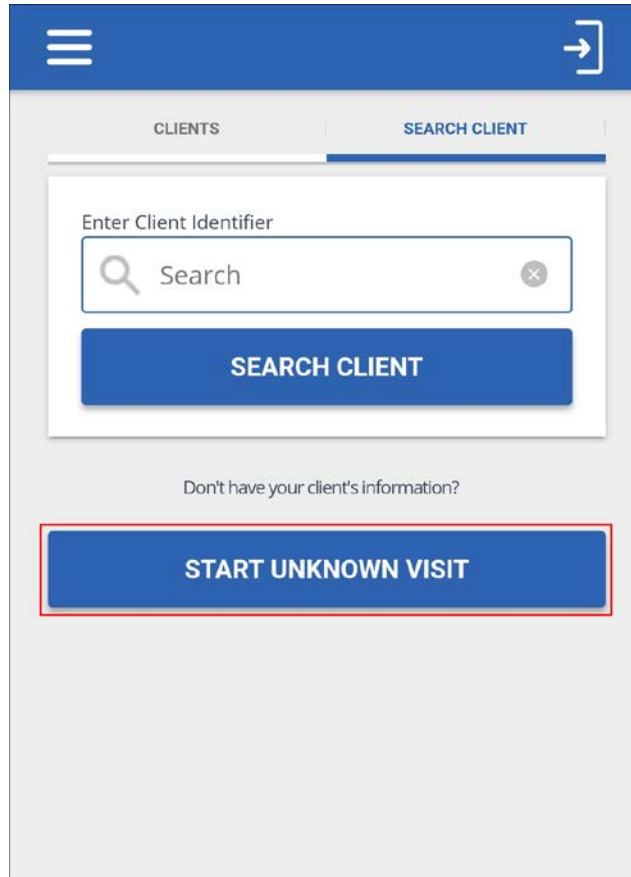
The group visit is completed.



Starting a Visit from the Search Client tab (Unknown Client)

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

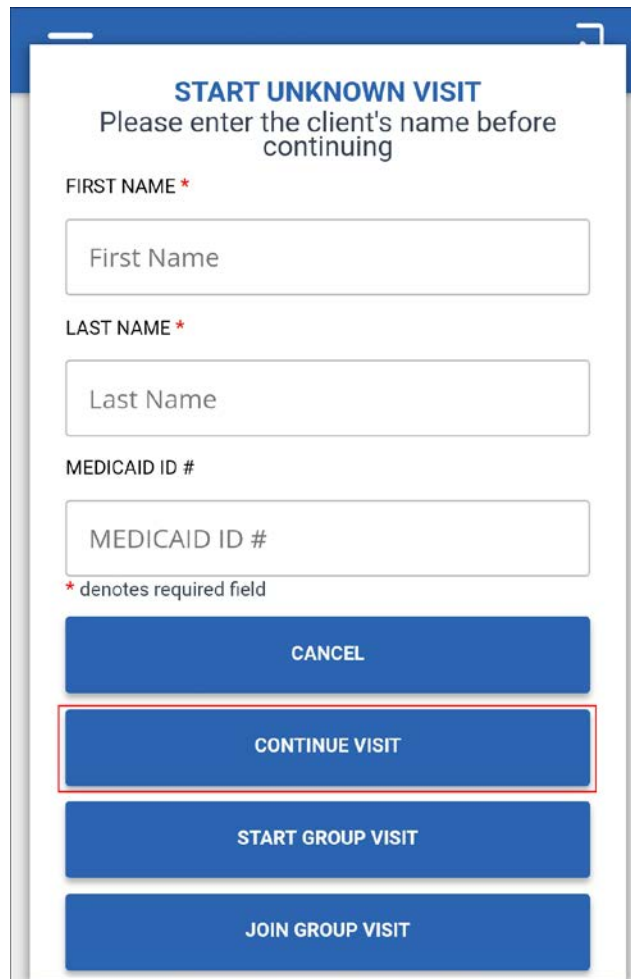
1. Tap **START UNKNOWN VISIT**.



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.



START UNKNOWN VISIT
Please enter the client's name before continuing

FIRST NAME *

First Name

LAST NAME *

Last Name

MEDICAID ID #

MEDICAID ID #

* denotes required field

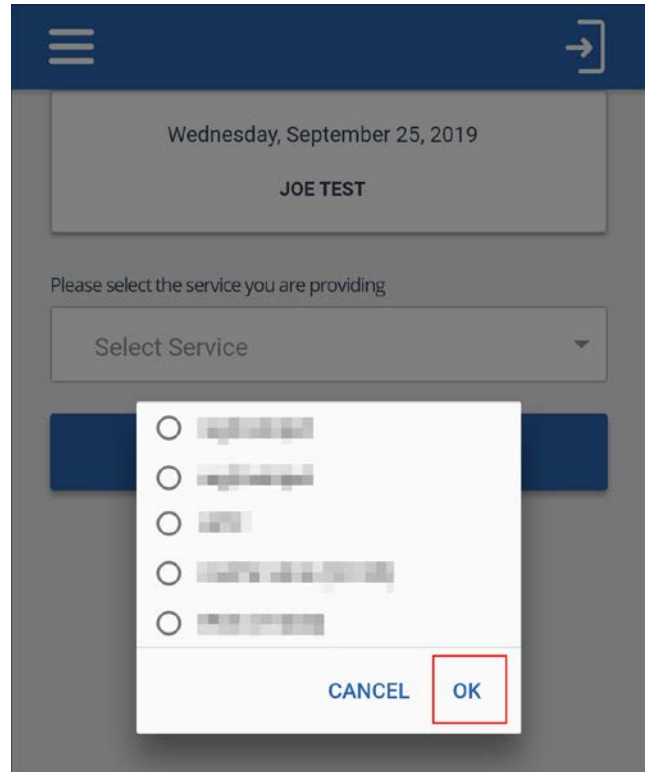
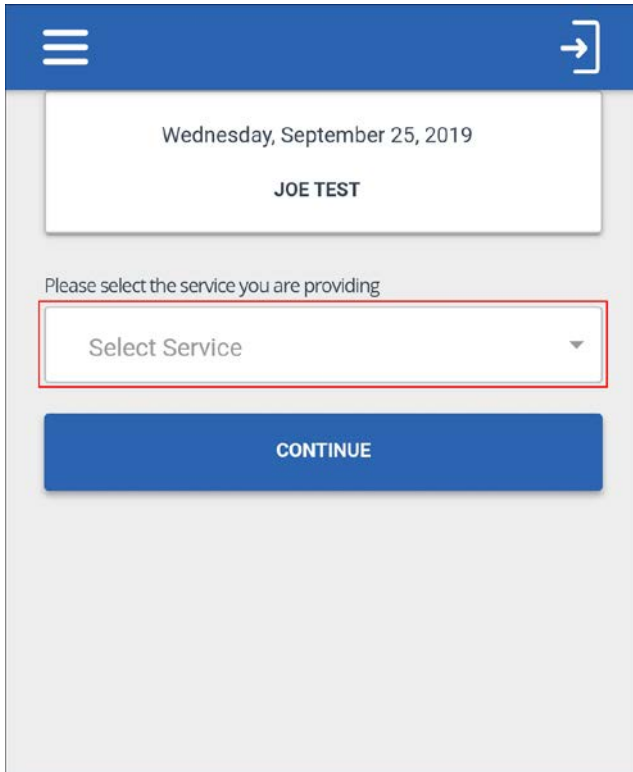
CANCEL

CONTINUE VISIT

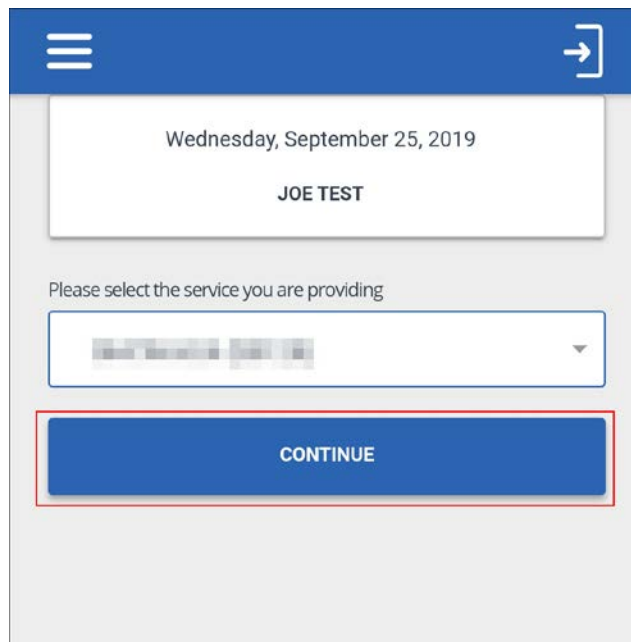
START GROUP VISIT

JOIN GROUP VISIT

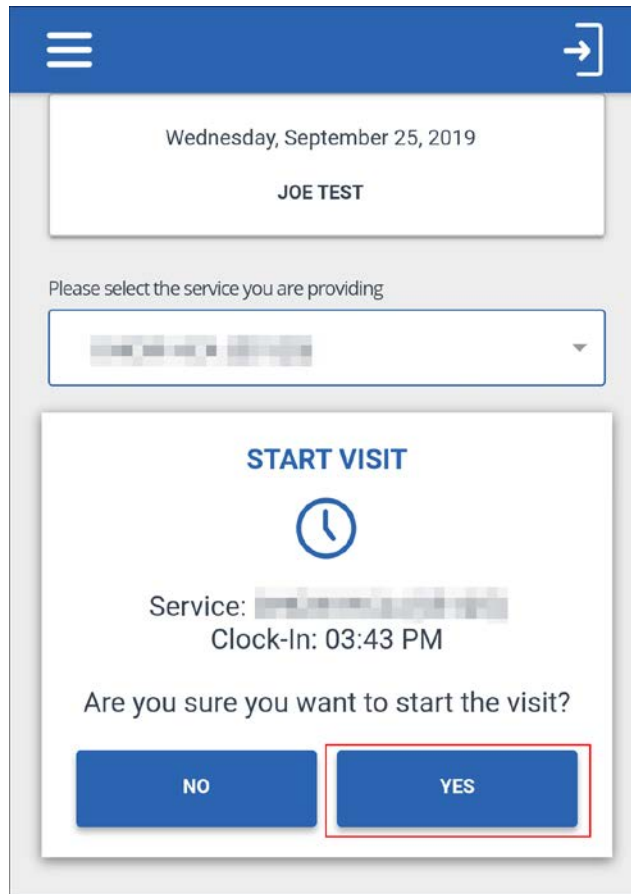
4. Tap the **Select Service** field
5. Select a service from the list.
6. Tap **OK**.



7. Tap **CONTINUE**.



8. Tap **YES** to start the visit.




Wednesday, September 25, 2019

JOE TEST

Please select the service you are providing

Service: [redacted]

START VISIT



Service: [redacted]

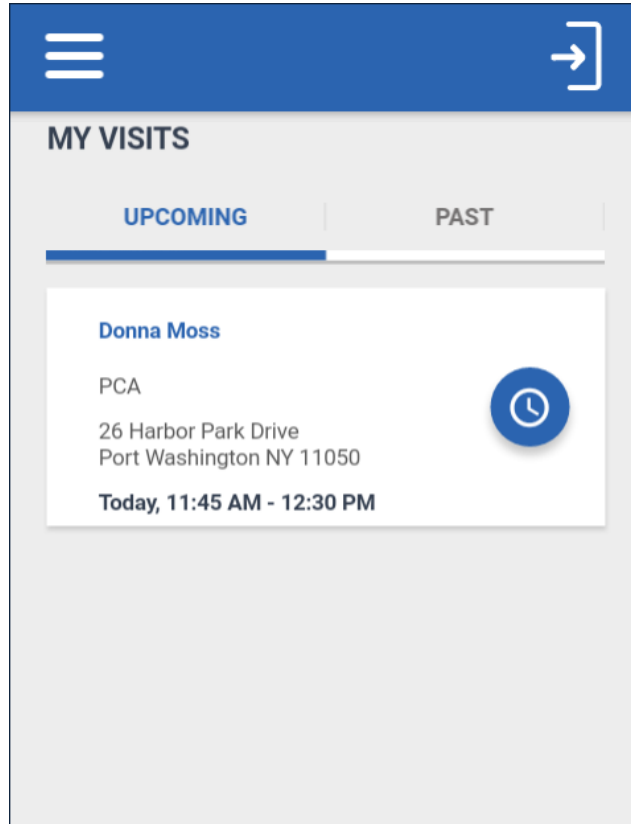
Clock-In: 03:43 PM

Are you sure you want to start the visit?

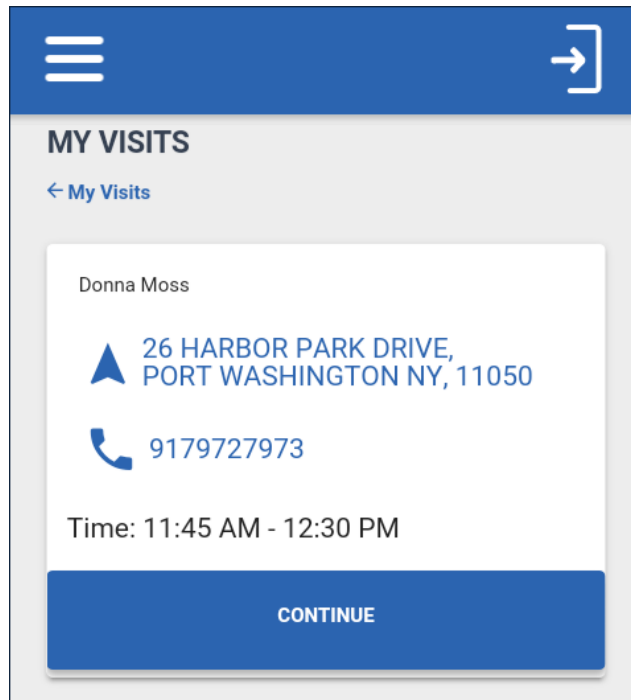
NO YES

Starting a Visit from the UPCOMING Tab (Scheduled)

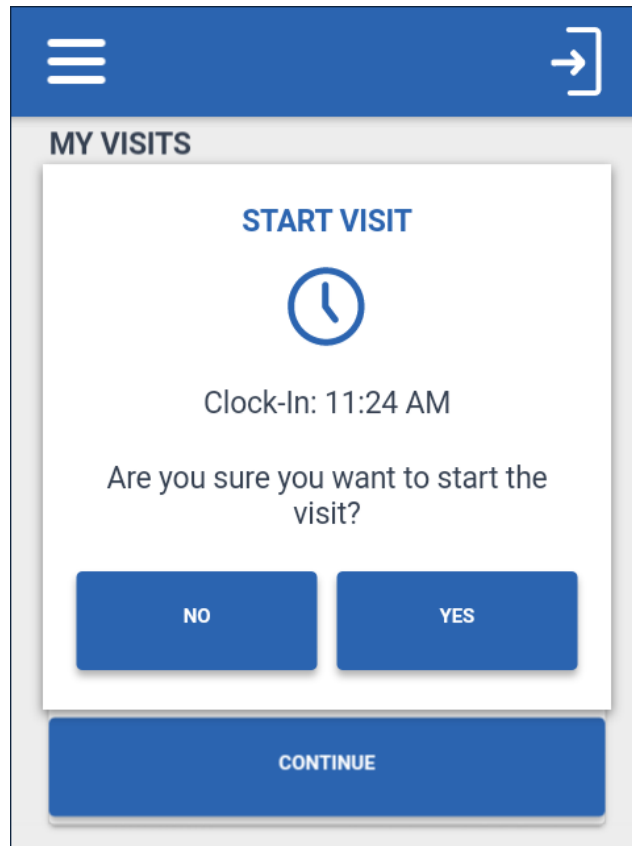
1. Tap a visit from the list of available visits on the UPCOMING tab.



2. Tap **CONTINUE**.



3. Tap **YES** to start the visit.



Completing a Visit

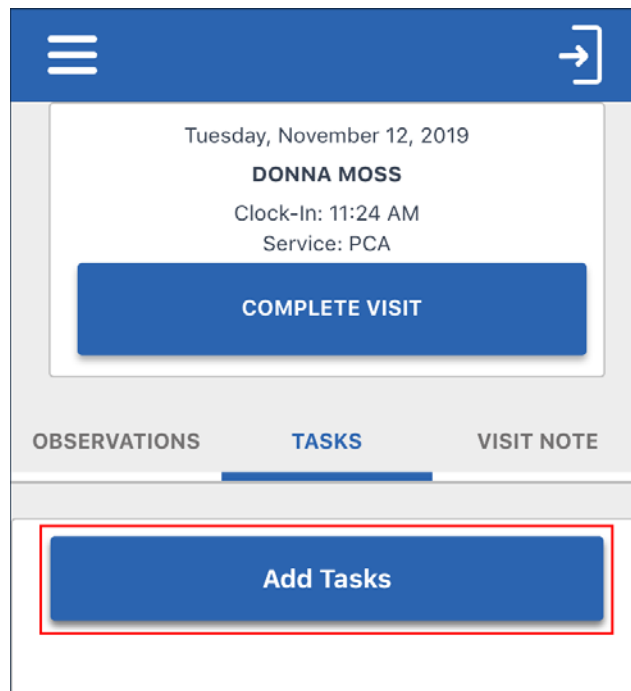
Additional Visit Functionality

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.

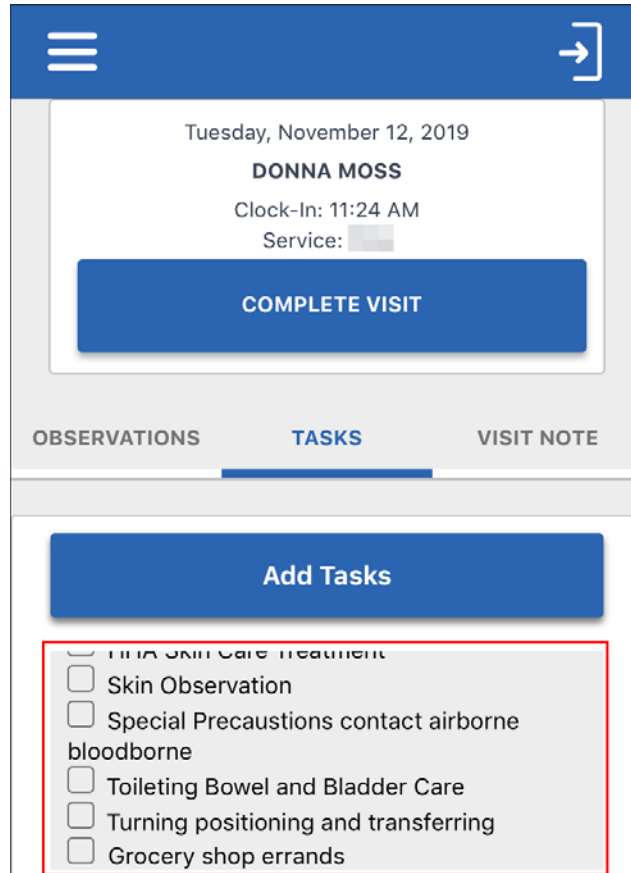
Tasks (Including Plan of Care)

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.



Tuesday, November 12, 2019

DONNA MOSS

Clock-In: 11:24 AM

Service:

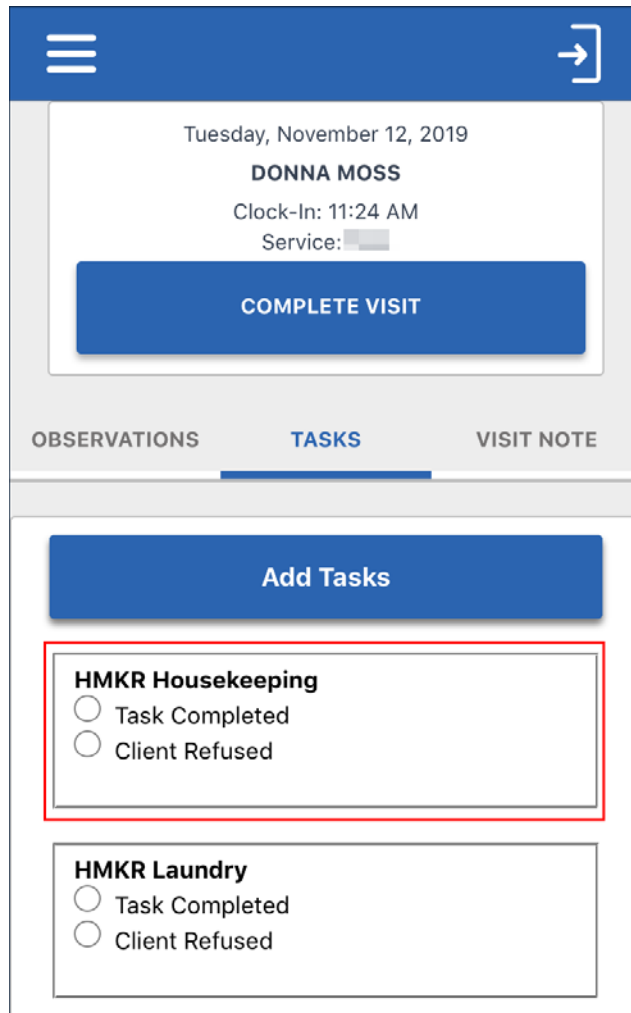
COMPLETE VISIT

OBSERVATIONS **TASKS** VISIT NOTE

Add Tasks

- Skin Observation
- Special Precautions contact airborne bloodborne
- Toileting Bowel and Bladder Care
- Turning positioning and transferring
- Grocery shop errands

4. Tap **Task Complete** or **Client Refused**.



Tuesday, November 12, 2019
DONNA MOSS
Clock-In: 11:24 AM
Service:

COMPLETE VISIT

OBSERVATIONS **TASKS** VISIT NOTE

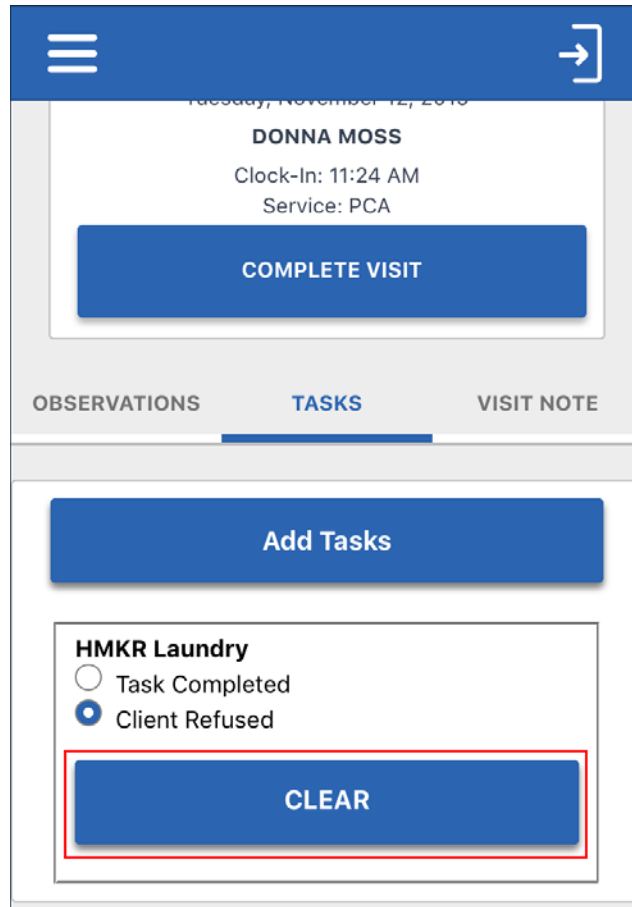
Add Tasks

HMKR Housekeeping
 Task Completed
 Client Refused

HMKR Laundry
 Task Completed
 Client Refused

Clearing Task Selection

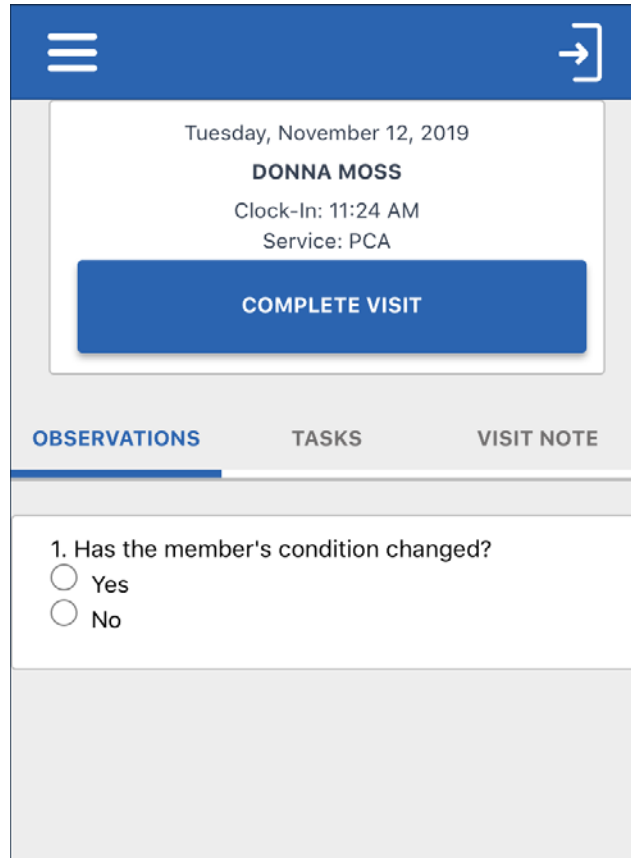
After tapping either Task Completed or Client Refused, the CLEAR TASKS button displays under each selected task. Tap CLEAR TASKS to clear the selection for that task.



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.



Tuesday, November 12, 2019

DONNA MOSS

Clock-In: 11:24 AM
Service: PCA

COMPLETE VISIT

OBSERVATIONS TASKS VISIT NOTE

1. Has the member's condition changed?

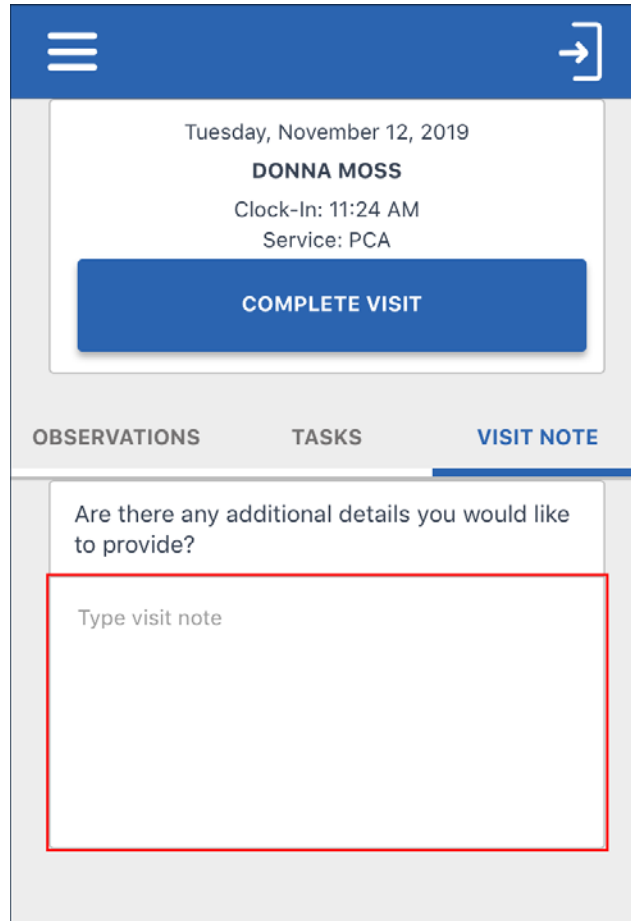
Yes

No

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.



Tuesday, November 12, 2019
DONNA MOSS
Clock-In: 11:24 AM
Service: PCA

COMPLETE VISIT

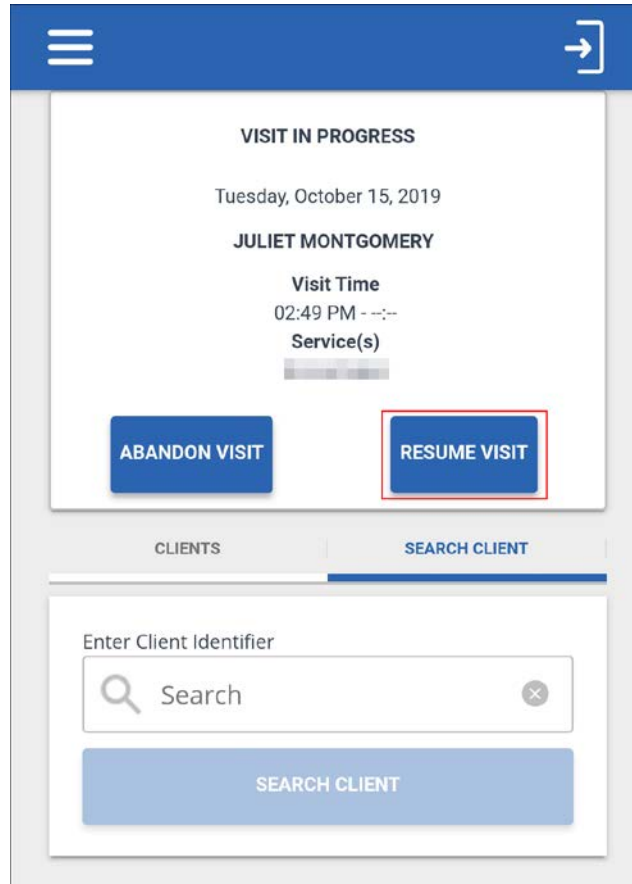
OBSERVATIONS TASKS **VISIT NOTE**

Are there any additional details you would like to provide?

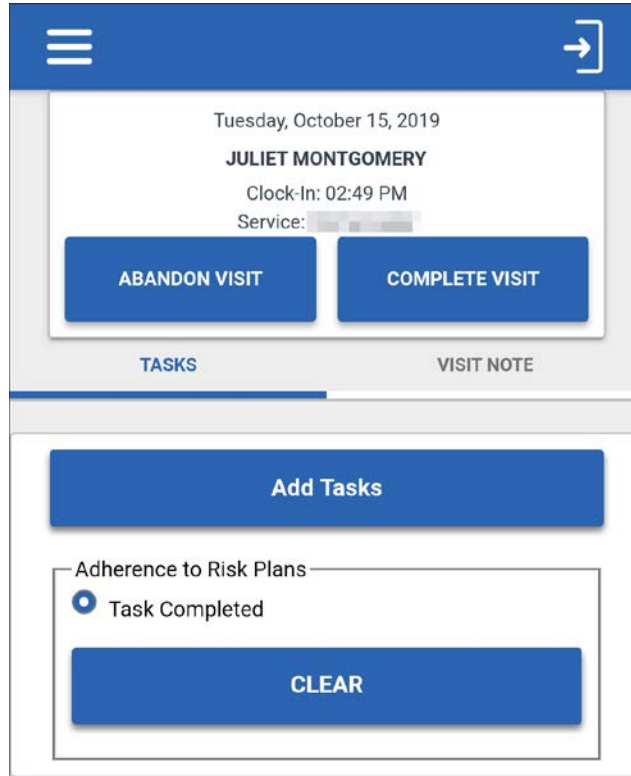
Type visit note

Completing a Visit (Staff)

1. Log-in to the application.
2. Tap **RESUME VISIT**.



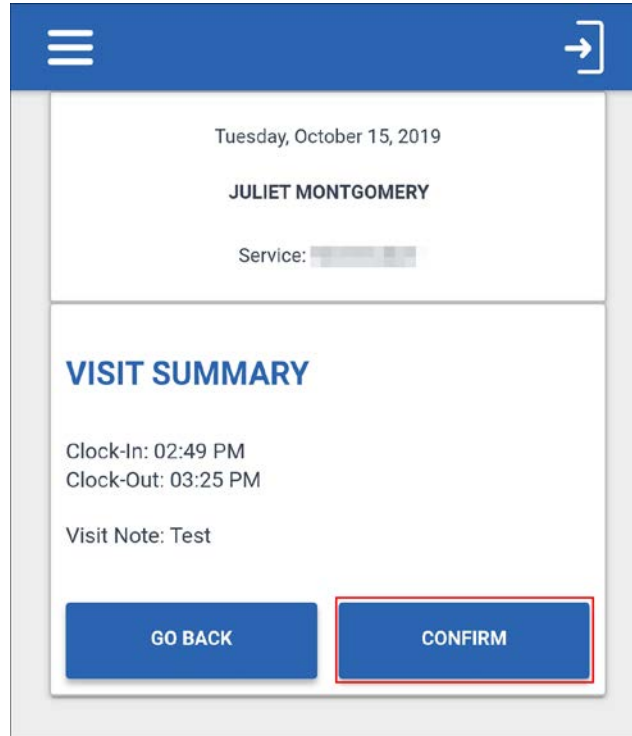
3. Complete any additional visit functionality, such as visit notes or tasks.
4. Tap **COMPLETE VISIT**.



The screenshot shows the Sandata Mobile Connect app 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, the date "Tuesday, October 15, 2019" is displayed, followed by the patient name "JULIET MONTGOMERY", the clock-in time "Clock-In: 02:49 PM", and the service name "Service: [REDACTED]". There are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". Below these buttons are two tabs: "TASKS" and "VISIT NOTE". The "TASKS" tab is selected, showing a blue "Add Tasks" button. Below this, there is a section titled "Adherence to Risk Plans" with a radio button selected for "Task Completed". At the bottom of this section is a blue "CLEAR" button.

5. Tap **CONFIRM**.

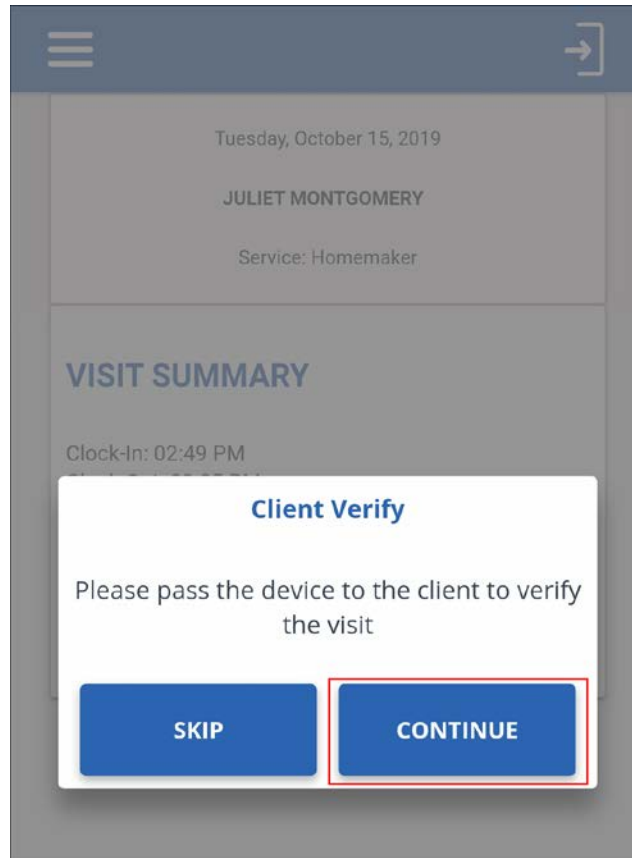
Depending on agency/payer configuration, the application returns the user to the landing page or displays a prompt to begin the client confirmation process.



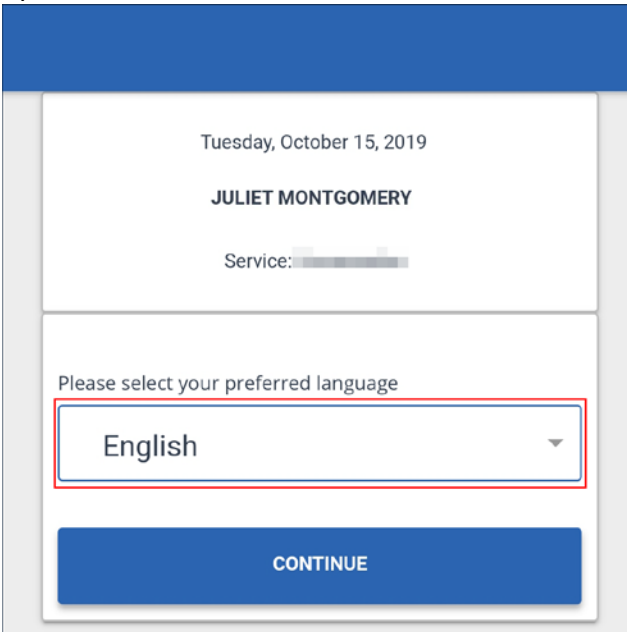
Complete a Visit (Client Confirmation)

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**.



Tuesday, October 15, 2019

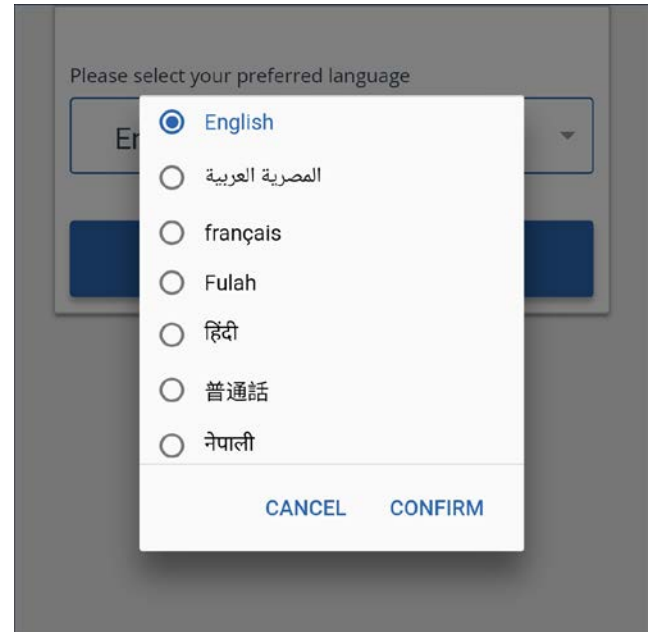
JULIET MONTGOMERY

Service: ██████████

Please select your preferred language

English ▼

CONTINUE



Please select your preferred language

English

العربية العربية

français

Fulah

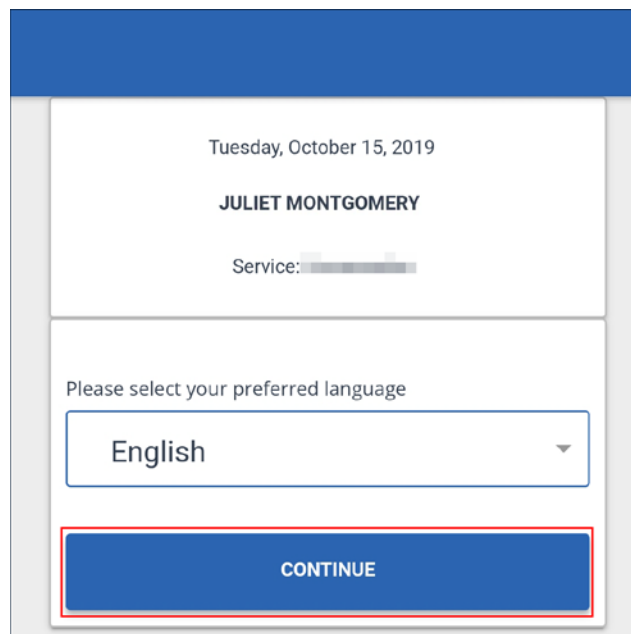
हिंदी

普通話

नेपाली

CANCEL **CONFIRM**

5. Tap **CONTINUE**.



Tuesday, October 15, 2019

JULIET MONTGOMERY

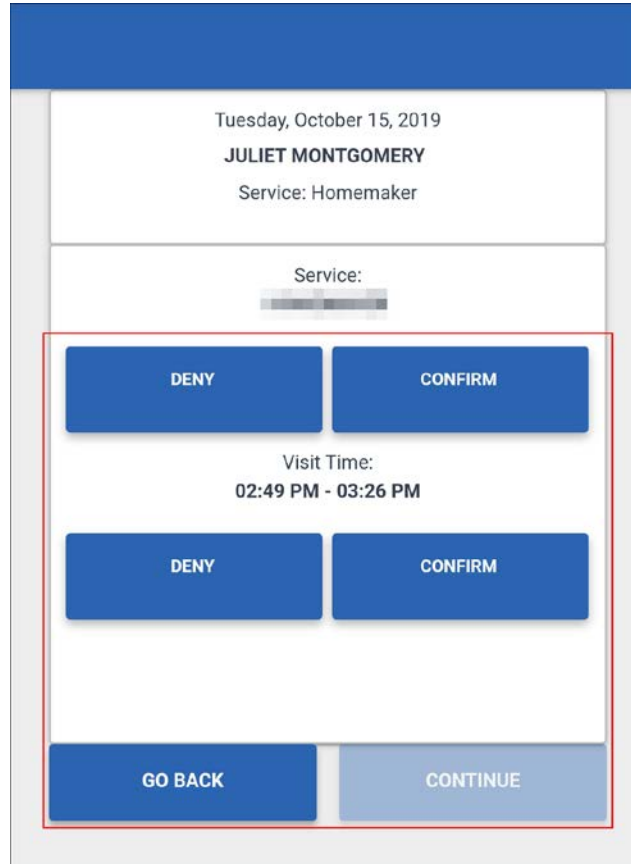
Service: ██████████

Please select your preferred language

English ▼

CONTINUE

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



Tuesday, October 15, 2019
JULIET MONTGOMERY
Service: Homemaker

Service:
[Blurred]

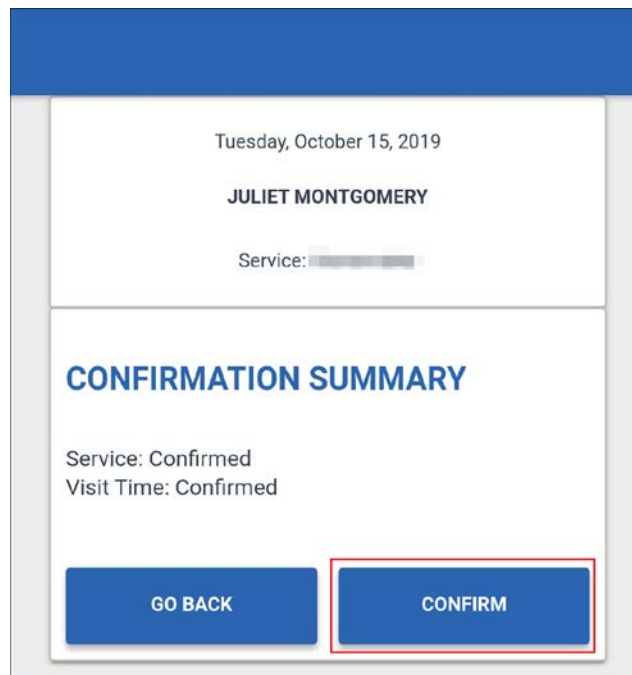
DENY **CONFIRM**

Visit Time:
02:49 PM - 03:26 PM

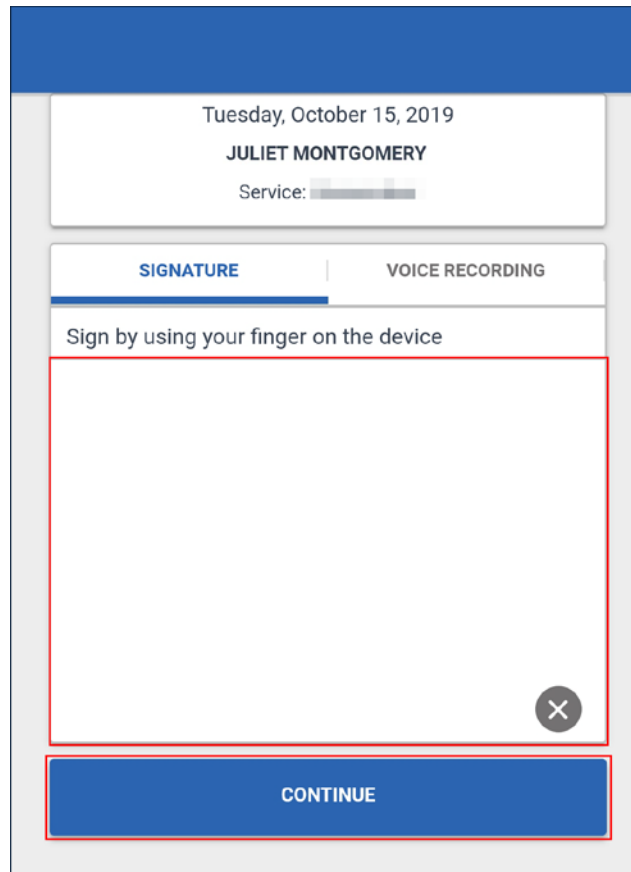
DENY **CONFIRM**

GO BACK **CONTINUE**

8. Tap **CONFIRM**.




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




The screenshot shows a mobile application interface for completing a visit. At the top, there is a blue header bar. Below it, the date "Tuesday, October 15, 2019" and the name "JULIET MONTGOMERY" are displayed. Underneath the name is a "Service:" label followed by a blurred area. The main content area has two tabs: "SIGNATURE" (which is selected and highlighted with a blue underline) and "VOICE RECORDING". Below the tabs, the text "Sign by using your finger on the device" is displayed above a large, empty rectangular box with a red border, intended for a signature. A small grey circle with a white 'X' is located in the bottom right corner of this box. At the bottom of the screen, there is a blue button labeled "CONTINUE".

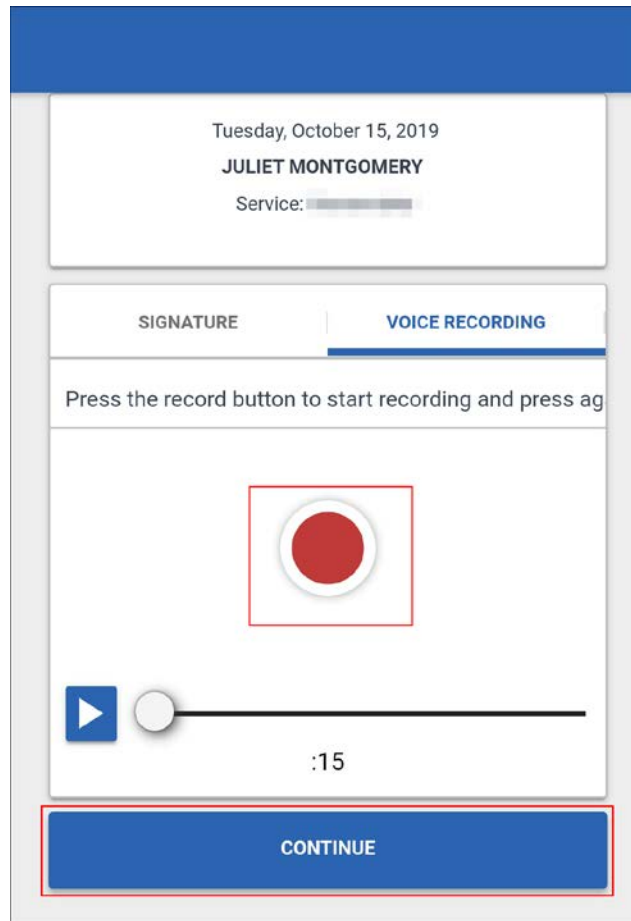


Note:

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**.



The screenshot shows the app interface during a voice recording session. At the top, it displays the date "Tuesday, October 15, 2019" and the name "JULIET MONTGOMERY". Below this, there is a "Service:" field with a greyed-out input. The interface has two tabs: "SIGNATURE" and "VOICE RECORDING", with "VOICE RECORDING" being the active tab. Below the tabs, there is a text prompt: "Press the record button to start recording and press ag". In the center, there is a large red circle icon representing the record button, which is highlighted with a red square. Below the record button, there is a play button icon and a progress bar with a slider. The progress bar shows a duration of ":15". At the bottom, there is a blue button labeled "CONTINUE", which is also highlighted with a red square.



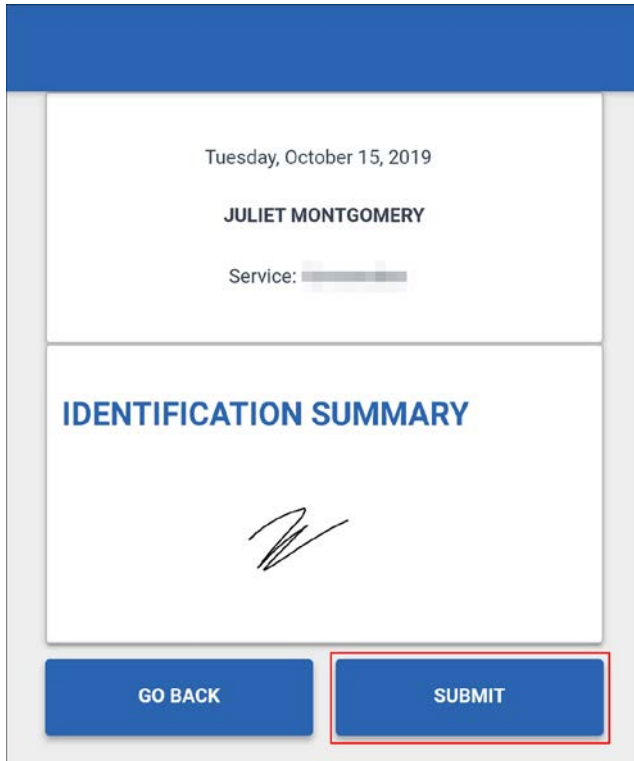
Note:
Tap record to overwrite an existing voice recording.



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

10. Tap **SUBMIT**.

Signature Confirmation



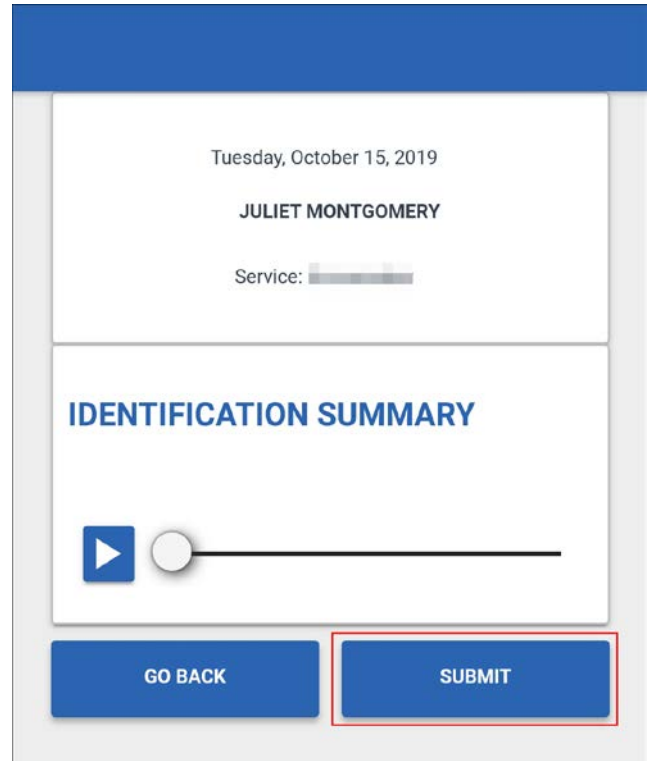
Tuesday, October 15, 2019
JULIET MONTGOMERY
Service: ██████████

IDENTIFICATION SUMMARY

[Handwritten Signature]

GO BACK **SUBMIT**

Voice Recording Confirmation



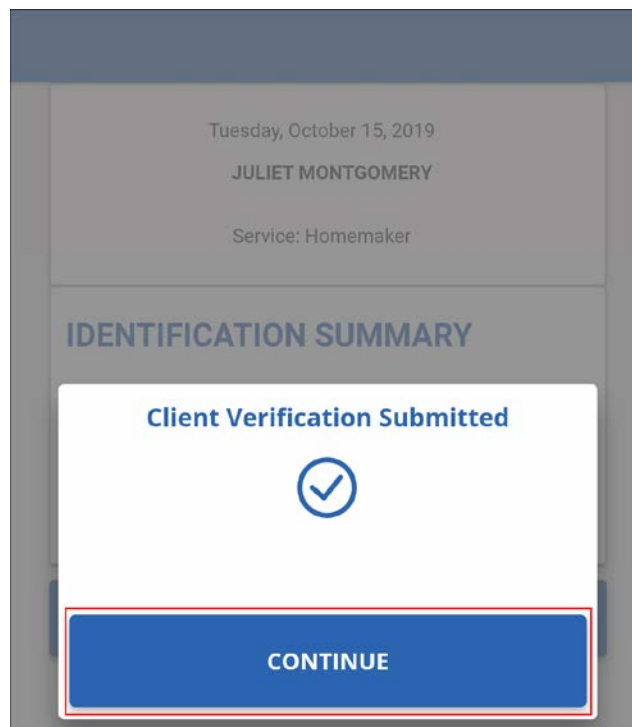
Tuesday, October 15, 2019
JULIET MONTGOMERY
Service: ██████████

IDENTIFICATION SUMMARY

▶ ○ —————

GO BACK **SUBMIT**

11. Tap **CONTINUE**.



Tuesday, October 15, 2019
JULIET MONTGOMERY
Service: Homemaker

IDENTIFICATION SUMMARY

Client Verification Submitted

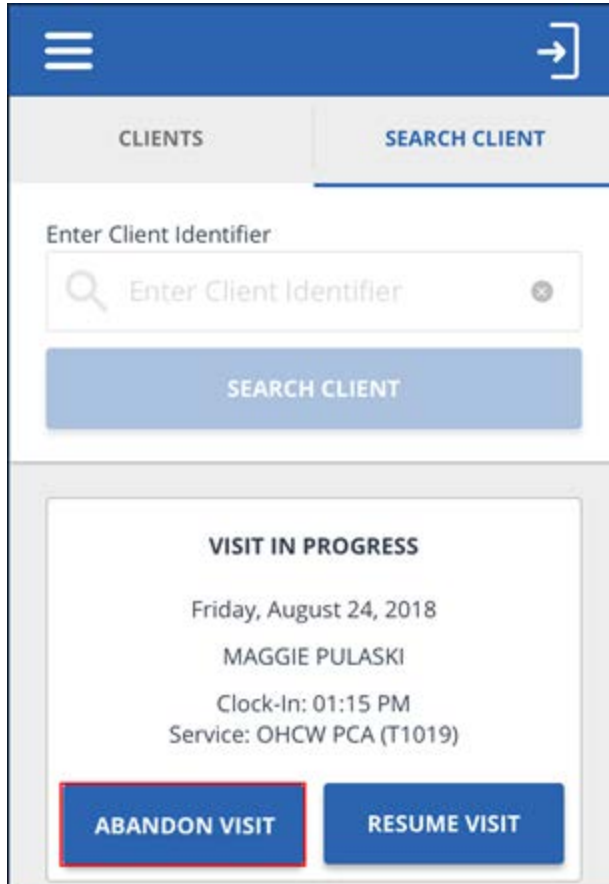
✓

CONTINUE

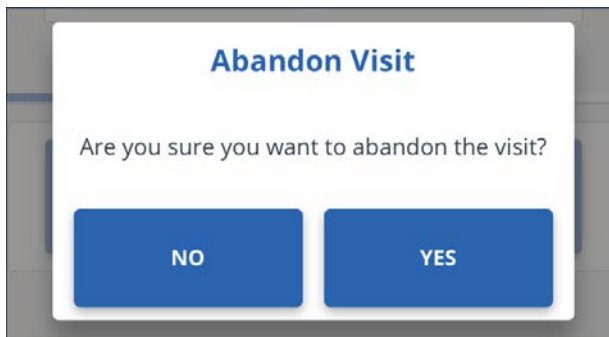
Abandon Visit

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**.




2. Tap **YES**.



Sign Out of Sandata Mobile Connect

Sign Out

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

