



# Sandata Mobile Connect Guide

*An Employee's guide on how to use the Sandata Mobile Connect App. (SMC)*

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# Contents

What is Sandata Mobile Connect (SMC).....	2
The Roles in SMC.....	2
Setting up the SMC app.....	3
Setting up Security Questions .....	4
Setting Up Your Password .....	5
Using the Menu Bar.....	6
Menu Bar Options .....	6
Starting a Visit .....	7
Starting an Unknown Visit.....	9
Completing a Visit.....	11
Client Verification .....	14
Abandoning a Visit.....	19

## What is Sandata Mobile Connect (SMC)

- The Sandata Mobile Connect app., also referred to as SMC is a software application that runs on a mobile device such as a smartphone or tablet. This means employees 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 Fixed Visit Verification method (FVV).

**NOTE:** FVV may not be applicable to your program.

## The Roles in SMC

- **Employee** = The person providing care.
  - Clocks in and out using either the client's phone, Sandata's Mobile Connect App. or a Fixed Visit Verification device. Check with your program to know which is used and preferred.
- **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.

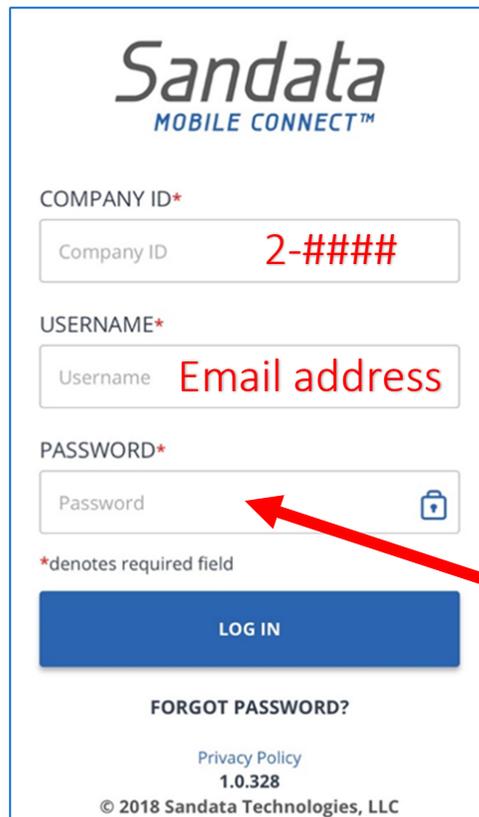
## Setting up the SMC app.

Refer to the “How to Download the SMC Mobile app.” quick reference page to learn how to install the SMC app. on your mobile device. Both iOS and Android versions are available.

- Install the SMC mobile app. on your smartphone or tablet
- Tap the SMC icon to launch the mobile app.



Your login credentials will be provided to you. After opening the app for the first time, you'll need to enter the following required information;



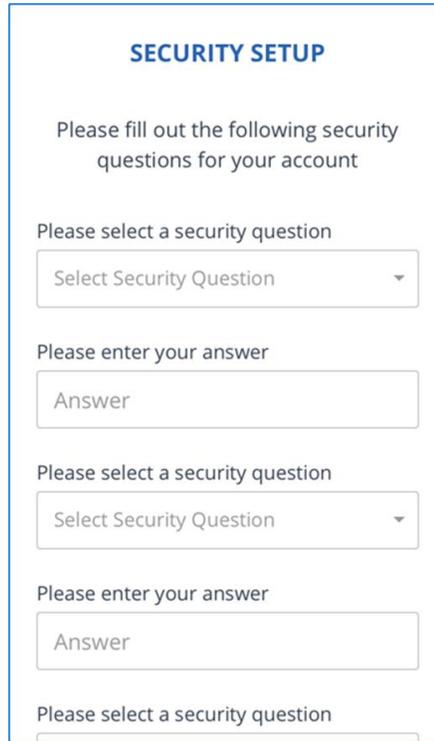
The screenshot shows the Sandata Mobile Connect login interface. At the top is the Sandata logo with 'MOBILE CONNECT™' below it. There are three input fields: 'COMPANY ID\*' with a placeholder 'Company ID' and a red '2-####' example; 'USERNAME\*' with a placeholder 'Username' and a red 'Email address' example; and 'PASSWORD\*' with a placeholder 'Password' and a red arrow pointing to it from the right. Below the fields is a blue 'LOG IN' button. At the bottom, there is a 'FORGOT PASSWORD?' link, a 'Privacy Policy' link, the version number '1.0.328', and the copyright notice '© 2018 Sandata Technologies, LLC'.

### PASSWORD

The temporary password you received in email

## Setting up Security Questions

You will need to select and answer several security questions the first time you log in.

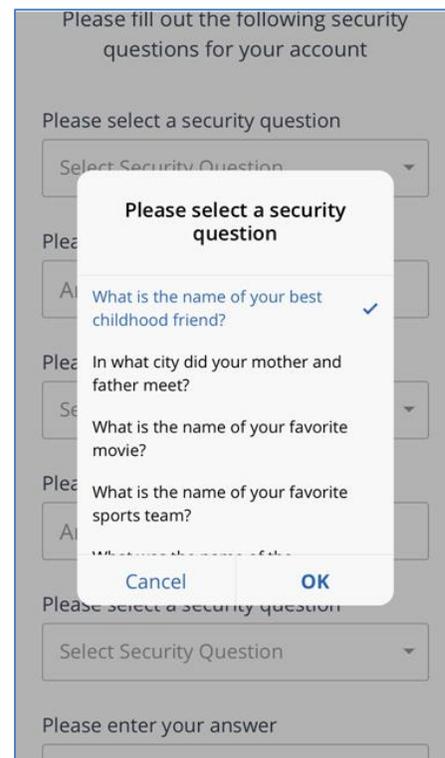


The screenshot shows a 'SECURITY SETUP' form with the following structure:

- Section header: **SECURITY SETUP**
- Instruction: Please fill out the following security questions for your account
- Field 1: Please select a security question (Dropdown menu with 'Select Security Question' placeholder)
- Field 2: Please enter your answer (Text input with 'Answer' placeholder)
- Field 3: Please select a security question (Dropdown menu with 'Select Security Question' placeholder)
- Field 4: Please enter your answer (Text input with 'Answer' placeholder)
- Field 5: Please select a security question (Dropdown menu with 'Select Security Question' placeholder)

Your answers should be...

- Be easy to remember
- Not be easily guessed
- Not change over time



The screenshot shows a dialog box titled 'Please select a security question' overlaid on a blurred background of the security setup form. The dialog contains a list of questions:

- What is the name of your best childhood friend? (Selected with a blue checkmark)
- In what city did your mother and father meet?
- What is the name of your favorite movie?
- What is the name of your favorite sports team?

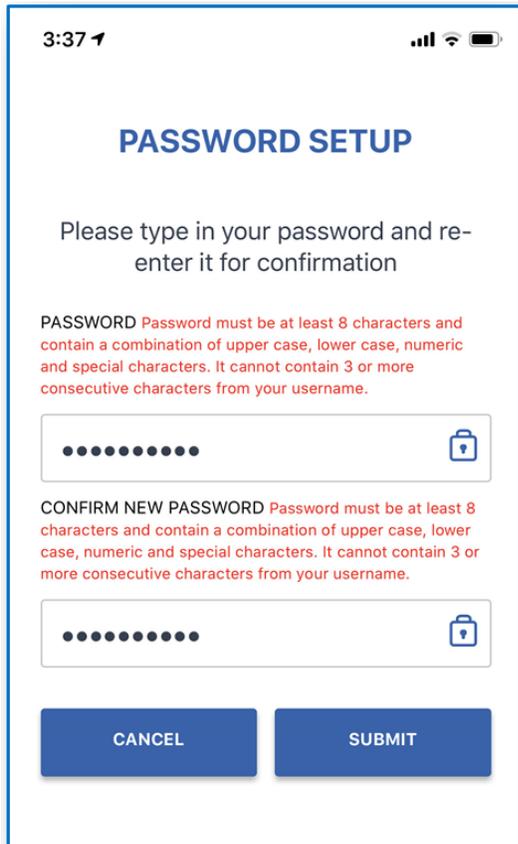
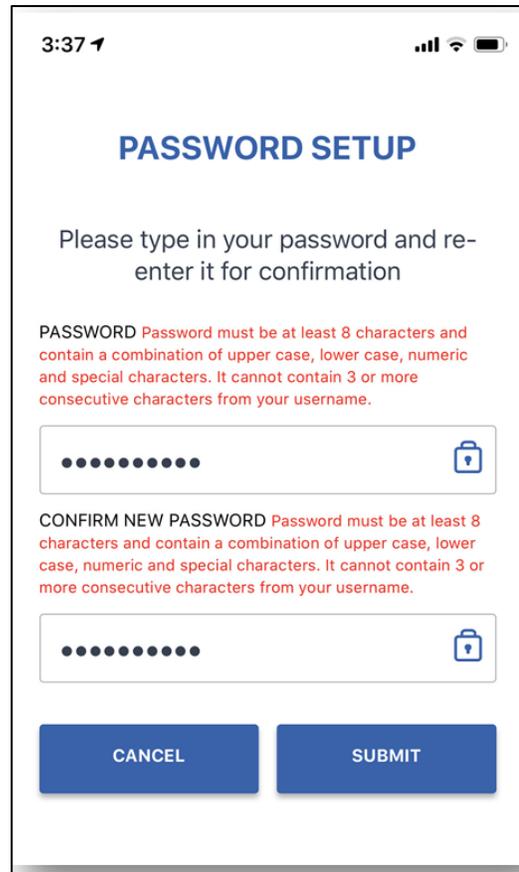
At the bottom of the dialog are 'Cancel' and 'OK' buttons.

# Setting Up Your Password

## Passwords MUST have:

- At least 1 upper case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 special character (@#\$%^)
- Be at least 12 characters long

Example: Password2020!



- Enter and re-enter a new password
- Tap **SUBMIT**  
***NOTE:** Passwords are case sensitive*

## Using the Menu Bar

The menu bar is displayed at the top of the mobile app.

1 Tap here for the **menu**

2 Tap here to **log out**



## Menu Bar Options

**My Visits** – Displays visits

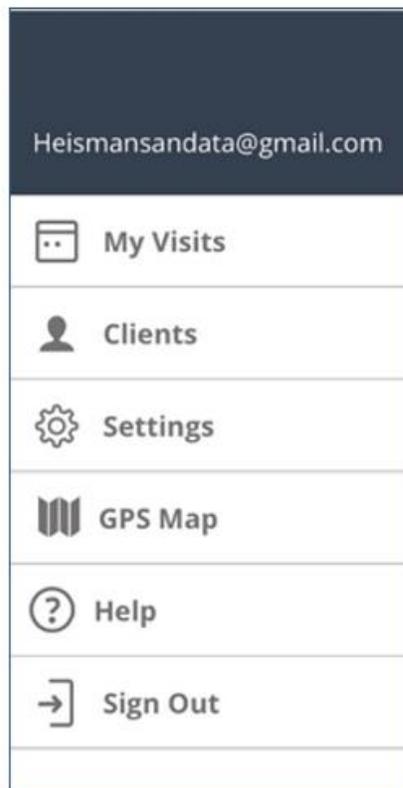
**Clients** – Displays the client screen

**Setting** – Displays the settings screen

**GPS** – Displays a map with a pin at location

**Help** – Displays the help screen

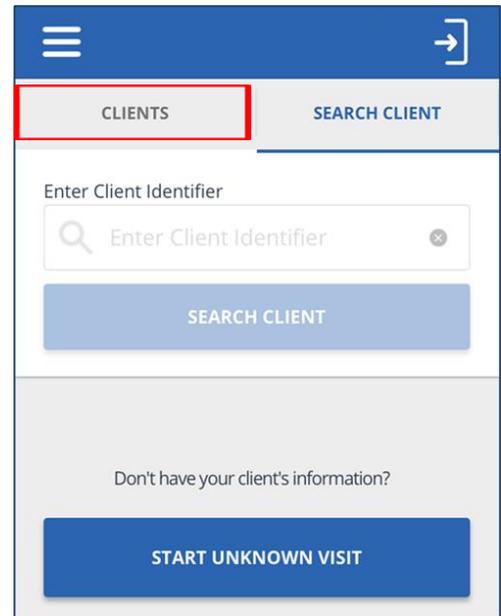
**Sign out** – Logs out of the app and displays the login screen.



## Starting a Visit

Upon logging in to Sandata Mobile Connect, you will be presented with a list of clients that you provide care to under the **Clients** tab.

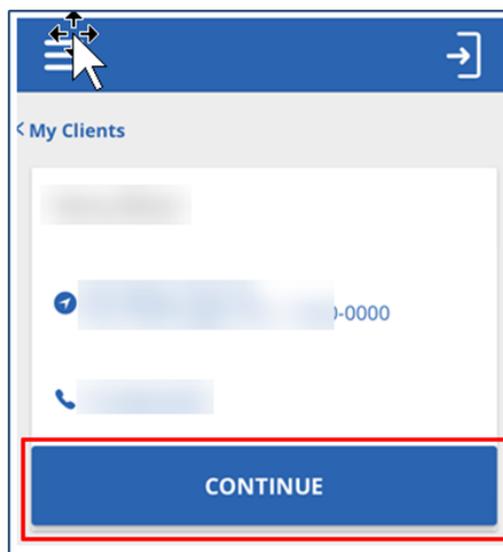
If you need to start a visit for a client that *is not* yet linked to your account, you should follow the steps to “Start an Unknown Visit” (page 9)



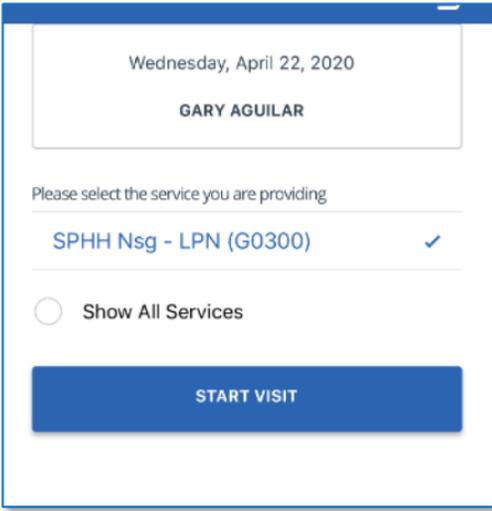
Start a visit from the **My Clients** screen

- Tap a client from the list to start a visit  
Check to make sure the right client displays

Tap **CONTINUE**



- Tap the *Service* to select
- Tap **START VISIT**



Wednesday, April 22, 2020

GARY AGUILAR

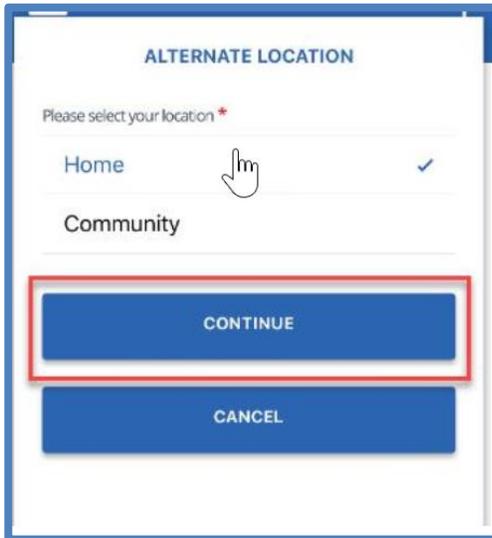
Please select the service you are providing

SPHH Nsg - LPN (G0300) ✓

Show All Services

**START VISIT**

- Select a location  
**NOTE:** *The Location step may not be applicable to your program.*



ALTERNATE LOCATION

Please select your location \*

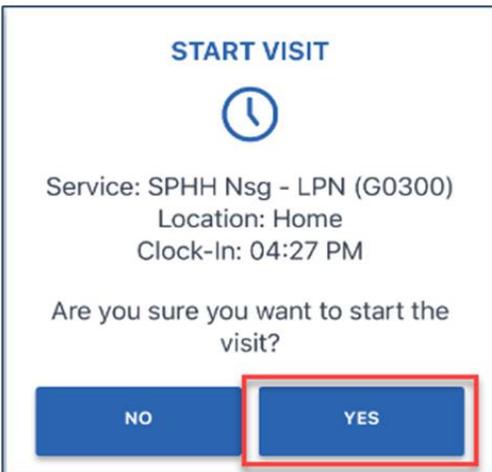
Home ✓

Community

**CONTINUE**

**CANCEL**

- Tap **CONTINUE**



**START VISIT**



Service: SPHH Nsg - LPN (G0300)  
Location: Home  
Clock-In: 04:27 PM

Are you sure you want to start the visit?

**NO** **YES**

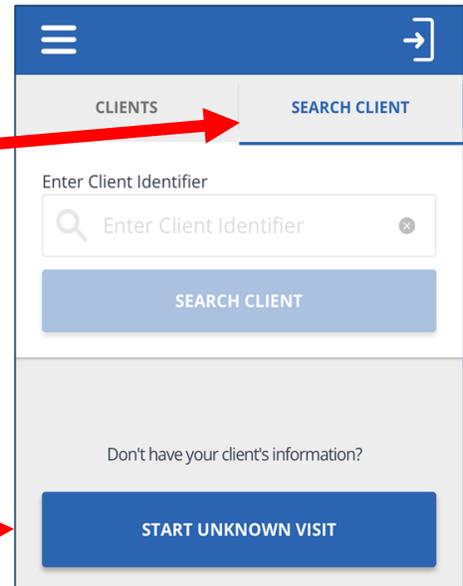
- Tap **YES** to start the visit

## Starting an Unknown Visit

You may need to start a visit for a client whose name doesn't appear in the client's tab. This is known as "STARTING AN UNKNOWN VISIT".

The **SEARCH CLIENT** tab is disabled since the employee only has access to their assign client(s).

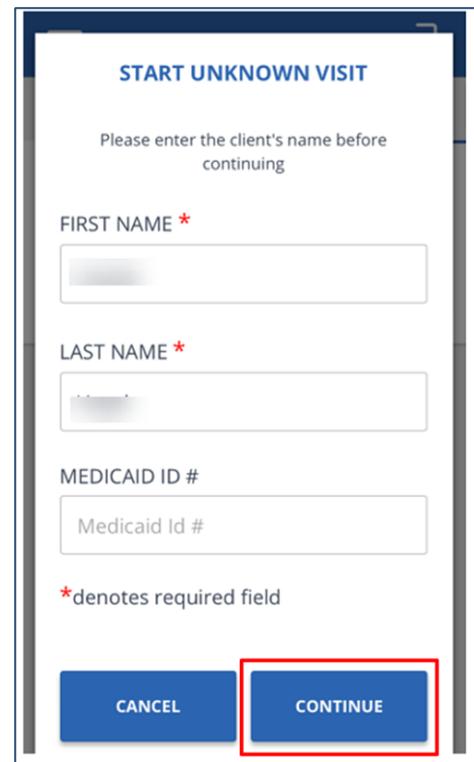
Tap **START UNKNOWN VISIT** to start a visit for a client whose name is not listed in the Clients tab.



The screenshot shows a mobile application interface with a blue header. Below the header are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. The 'SEARCH CLIENT' tab is highlighted in blue. Below the tabs is a search input field with a magnifying glass icon and a 'SEARCH CLIENT' button. Below that is a section with the text 'Don't have your client's information?' and a blue button labeled 'START UNKNOWN VISIT'. A red arrow points from the text 'The SEARCH CLIENT tab is disabled...' to the 'SEARCH CLIENT' tab. Another red arrow points from the text 'Tap START UNKNOWN VISIT to start a visit...' to the 'START UNKNOWN VISIT' button.

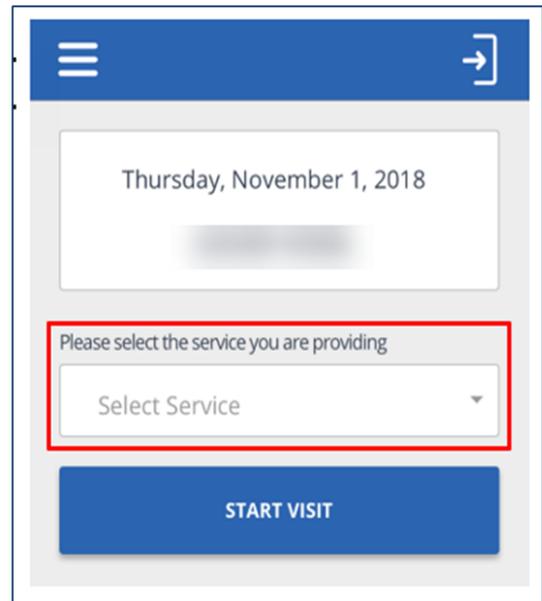
Enter the clients **FIRST NAME** and **LAST NAME**  
Asterisks \* mean these are required fields.

- Tap **CONTINUE**



The screenshot shows a mobile application interface for starting an unknown visit. The title is 'START UNKNOWN VISIT'. Below the title is the instruction 'Please enter the client's name before continuing'. There are three input fields: 'FIRST NAME \*', 'LAST NAME \*', and 'MEDICAID ID #'. Below the fields is a note '\*denotes required field'. At the bottom are two buttons: 'CANCEL' and 'CONTINUE'. The 'CONTINUE' button is highlighted with a red box. A red arrow points from the text 'Enter the clients FIRST NAME and LAST NAME' to the 'FIRST NAME' and 'LAST NAME' fields. Another red arrow points from the text 'Asterisks \* mean these are required fields.' to the asterisks next to the 'FIRST NAME' and 'LAST NAME' labels.

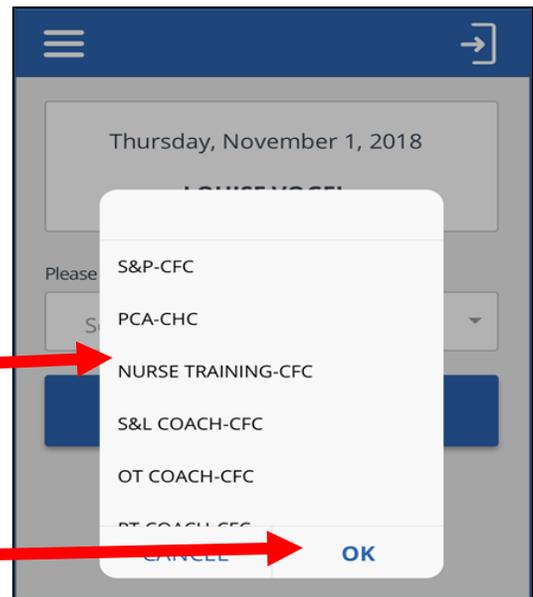
Tap the **Select Service** field and tap a **service** from the list.



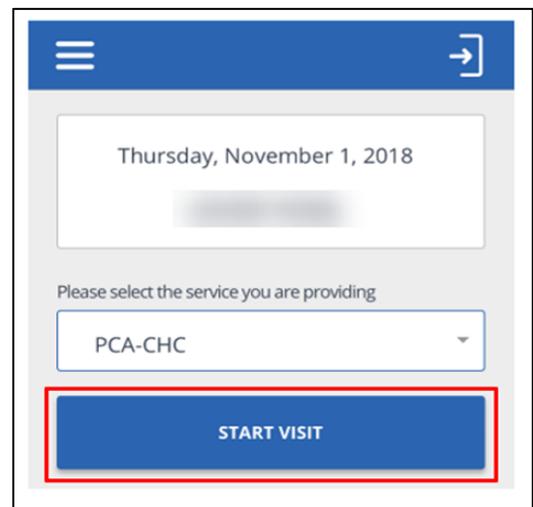
There might only be *one* service to select.

- Tap **SERVICE**

- Tap **OK**



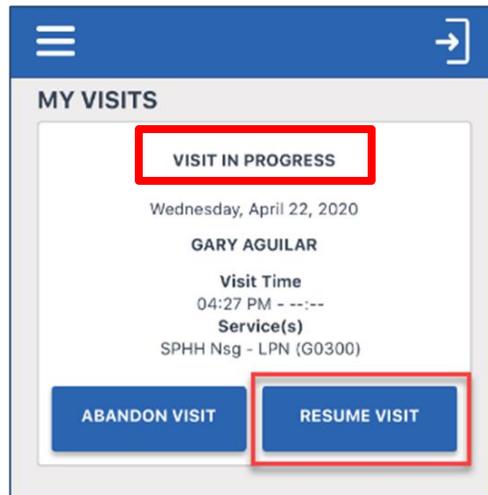
- Tap **START VISIT**



## Completing a Visit

- Log into the SMC mobile app.
- If a visit is in progress, it will display.

- Tap **RESUME VISIT**

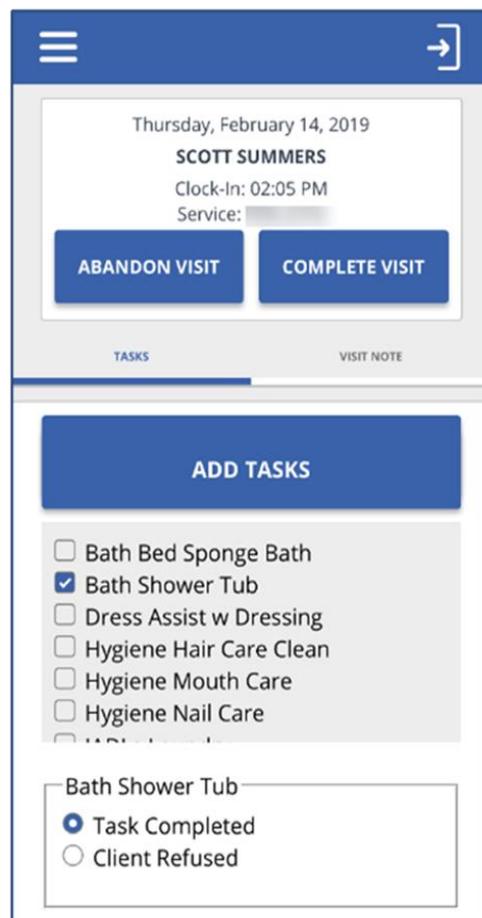


- Tap the task(s) performed from the task list.

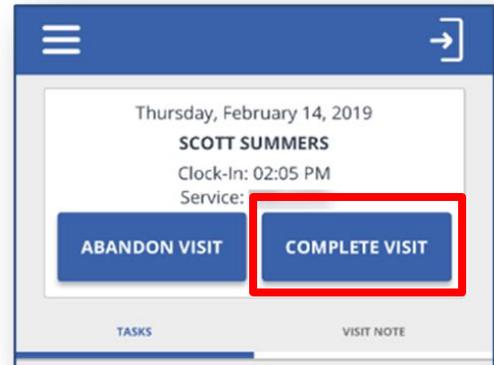
**NOTE:** *Tasks may not be applicable to your program.*

- Selected the task(s) performed and then tap either “**Task Completed**” or “**Client Refused**”.

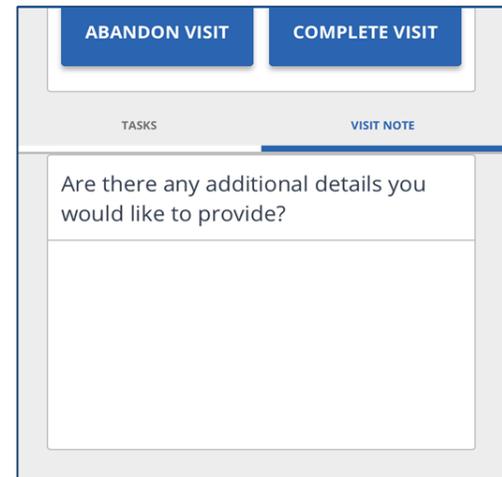
- Tap **ADD TASKS** to close the tasks list.



- Tap COMPLETE VISIT

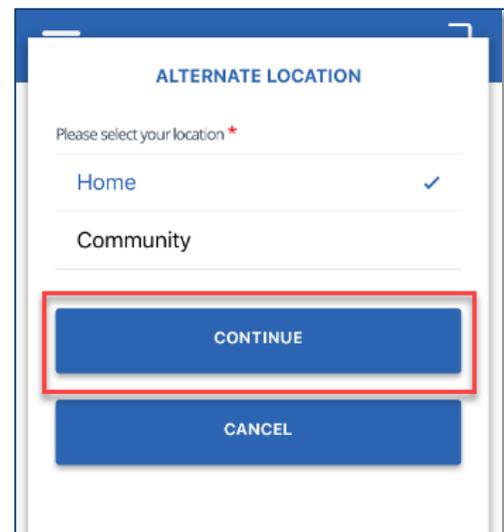


- Tap the VISIT NOTE tab
- Using the keyboard on your mobile device, enter notes about the visit.
- Visit notes are optional and are not required. DO NOT use visit notes for any medical documented information.

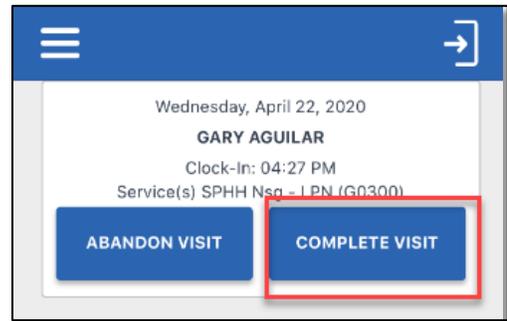


- Select the Location
- NOTE:** *The Location step may not be applicable to your program.*

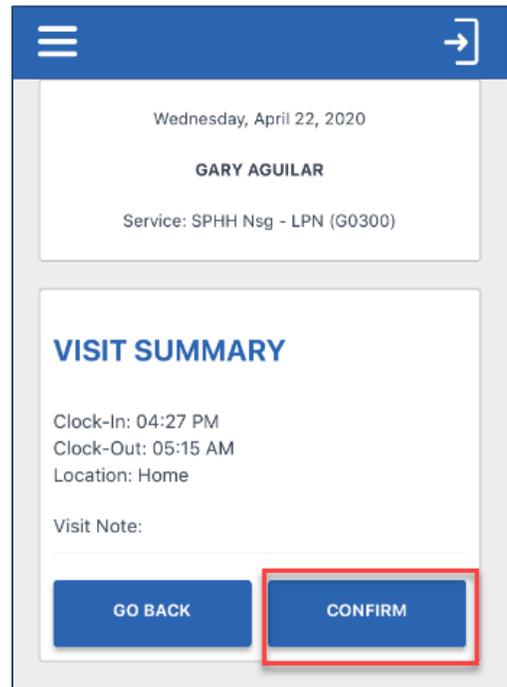
- Tap CONTINUE



- Tap **COMPLETE VISIT**



- Tap **CONFIRM**

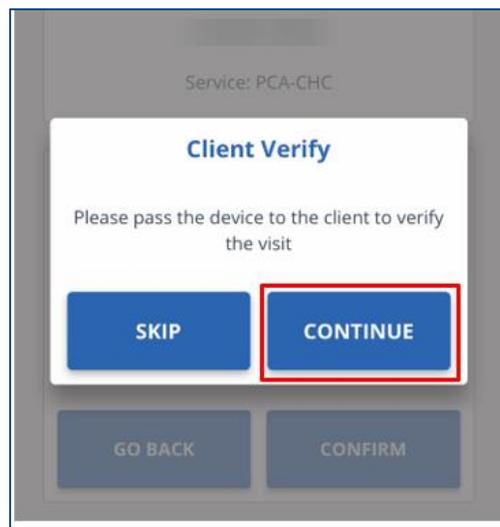


## Client Verification

This option may or may not be required in your program.

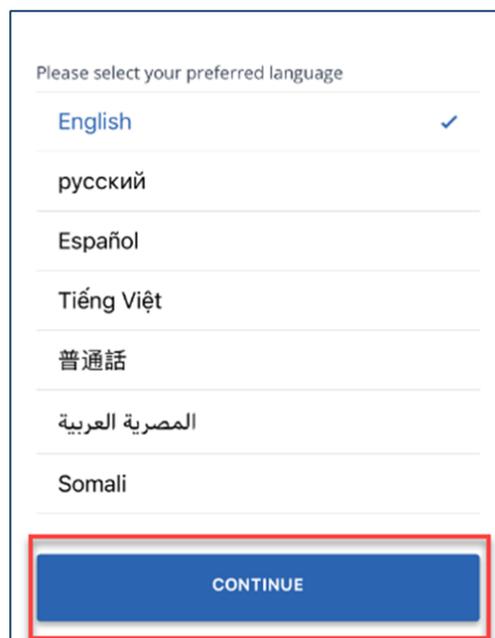
- Tap **CONTINUE** and pass the mobile device to the client to verify the visit.

*NOTE: If the client is unable to verify*



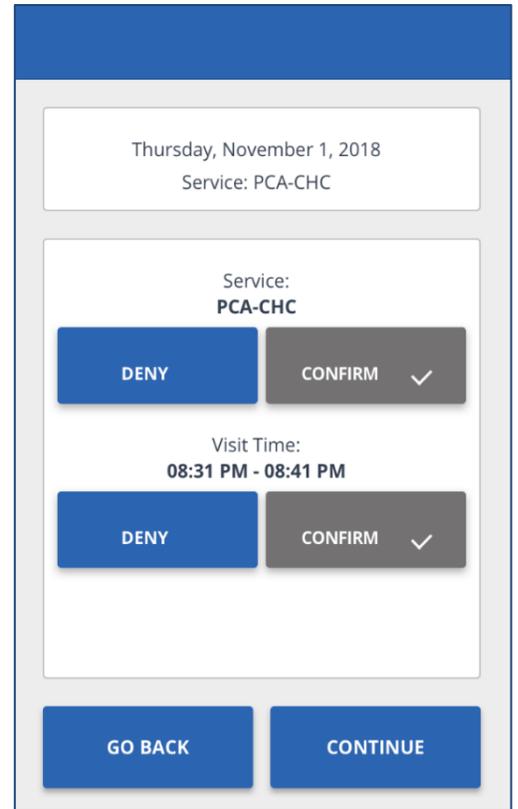
- The client will tap the **language** field and select a language.

*NOTE: English may be the only language in the list.*



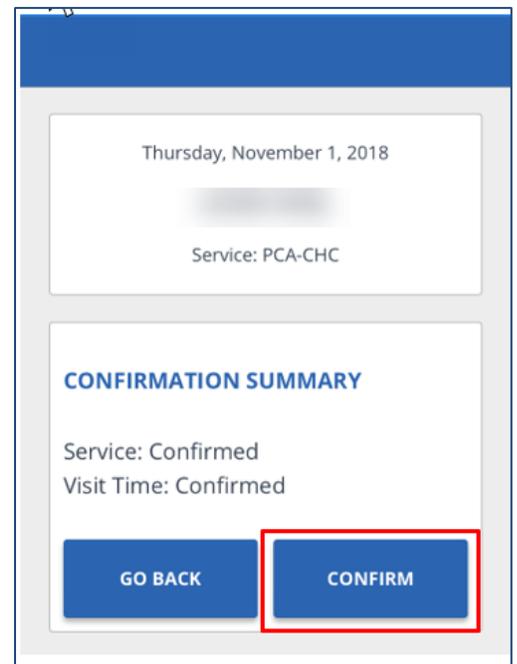
- Client taps **CONFIRM** or **DENY** to approve or reject **Service(s)** and **Visit Time**.
- If client taps **CONFIRM**, it means they agree the visit start and end times and service(s) were performed.
- If they tap **DENY**, it means they do not agree the visit start and end times or the service(s) that were performed.

- Tap **CONTINUE**

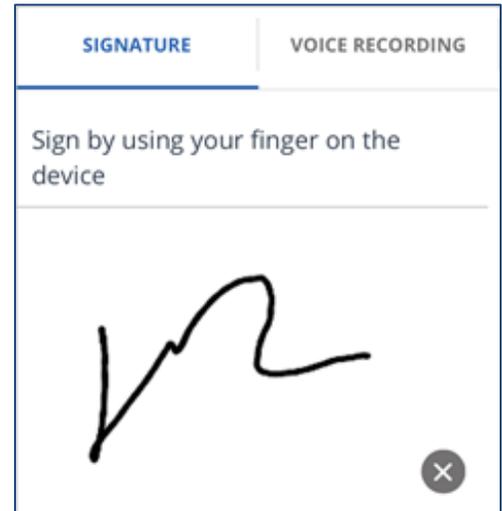


**NOTE:** *If a client **DENIES** either (or both) **SERVICE(s)** or **VIST TIME**, you will still be able to complete the visit, however, the visit will show "Exception(s)" and need to be fixed in EVV.*

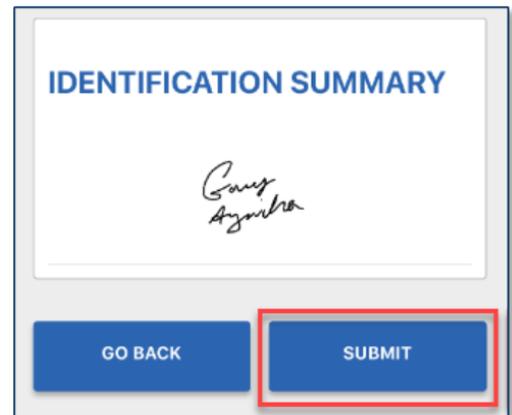
- Tap **CONFIRM**



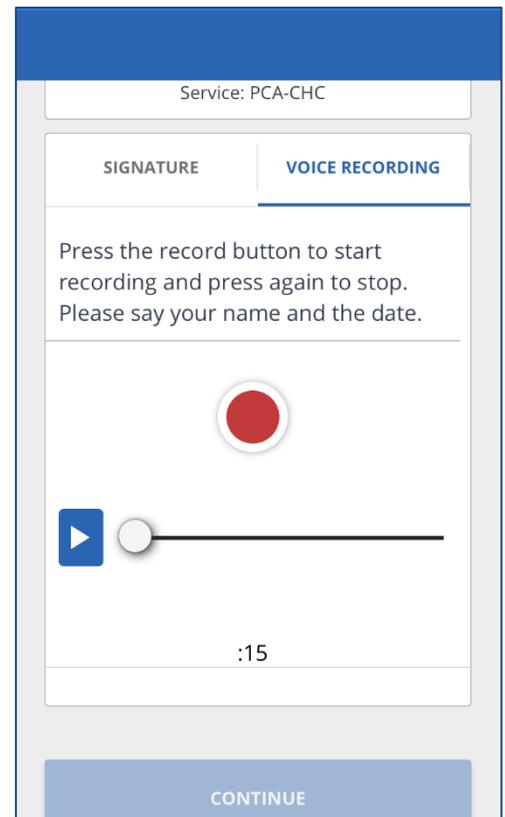
- Client will tap either **SIGNATURE** or **VOICE RECORDING**.
- Using **SIGNATURE**, they will sign the device using a finger and tap **CONTINUE**.
- Tap  to clear the signature field and sign again



- Tap **SUBMIT** (Signature Confirmation)

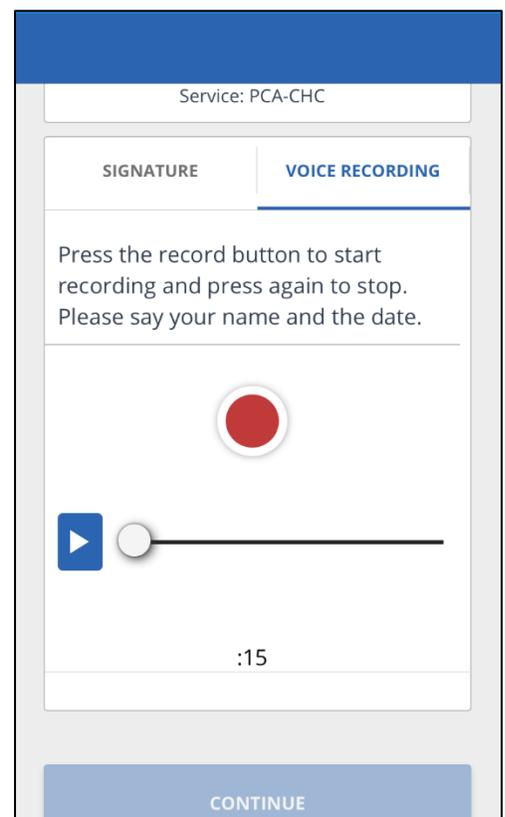


- If they tap **VOICE RECORDING**, tap the Record  icon.
- If asked, tap **OK** to allow the mobile app. to access the microphone
- Tap the Record  icon to stop the recording

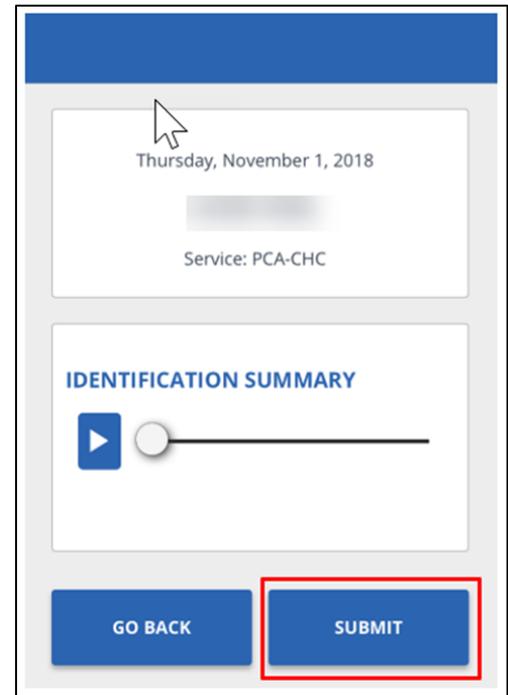


- Voice recordings can be a maximum of 15 seconds

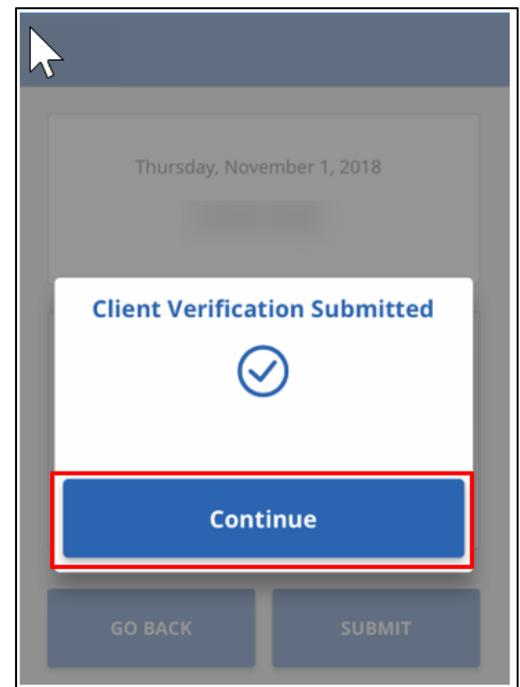
- Tap the Play  icon to play the recorded audio



- Tap **SUBMIT** (Voice Confirmation)



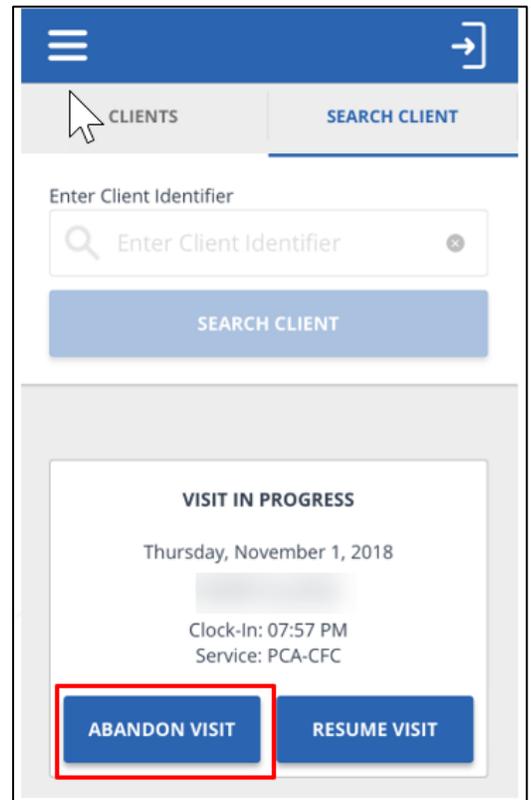
- Tap **CONTINUE**



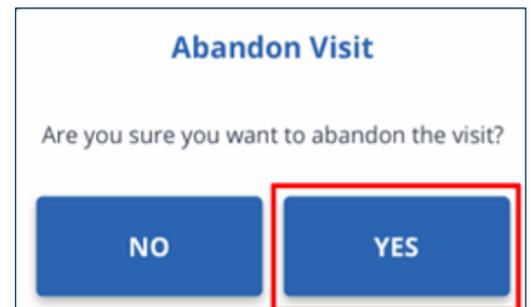
## Abandoning a Visit

- There may be situations when you must cancel a visit that you started.
- For example, if you forgot or were unable to check out at the end of a visit and you need to start a new visit for another client.

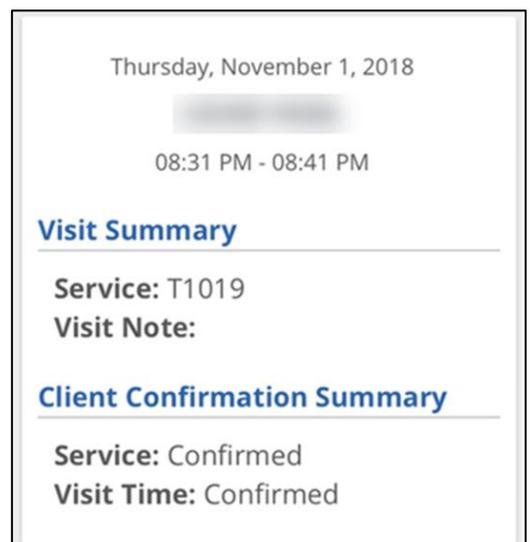
- Tap **ABANDON VISIT**



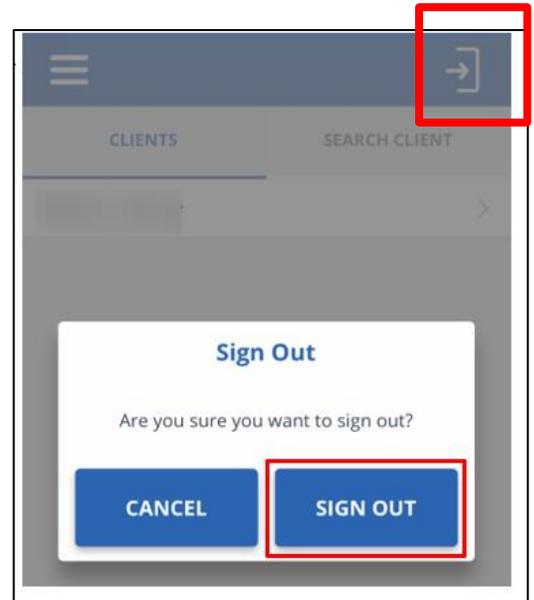
- Tap **YES**



- View past visits from the **My Visits** screen
- Tap a visit to view details about the visit



- Tap the sign out icon  located at the top of the screen in the menu bar.
- A sign out pop-up displays.
- Tap **SIGN OUT** and you will be logged out of the mobile app.



**NOTE:** An Abandoned Visit will show as an exception and need to be fixed/acknowledged in EVV's Visit Maintenance.