Electronic Visit Verification Sandata Mobile Connect Essentials

WISCONSIN DEPARTMENT *of* **HEALTH SERVICES**

Welcome to the Wisconsin Department of Health Services, EVV Essentials. Everything you need to know about the Sandata Mobile Connect app—also referred to as the SMC app.

If you are new to your agency—new to EVV—if you'd like to learn more about the ins and outs of the SMC app, this session is for you! Today, we're covering everything you need to know about the SMC app.

Agenda

- Review newer features for the Sandata Mobile Connect (SMC) app.
- Learn how to log in and complete a visit on Sandata's app.
- Learn how to reset SMC app password.
- Learn useful tips and where to find resources.

Today's session is devoted to sharing everything we know about the SMC app. If your agency is not using the State-provided Sandata EVV system, this training will not be helpful to you. Also if you're not using the State-provided system, we suggest contacting your alternate EVV vendor for support.

Some of the items we'll cover in this session:
   Preview new features coming up
   Learn how to log in, start, and complete a visit using the new version of the app—even when there isn't any Wi-Fi or cell coverage available. We recommend using the new app; its logo is shown here.
   Learn how to reset your SMC app password—right from your device.
   We'll share tips along the way using the SMC app and where to find helpful EVV resources.

Note - The logo that you see at the bottom of this slide is the app we are talking about today. Be sure you are using this version of the app.

Common Terms

- Electronic visit verification (EVV)—A system that uses technologies to verify that authorized services were provided (Workers are required to send information at the beginning and end of each visit.)
- SMC app—A tool used by employees to check in and check out of a visit
- Sandata EVV Portal—An administrative tool for verifying key visit data points

On the screen you'll see some common terms that will be used throughout today's training and within the Sandata system.

1 **Electronic visit verification (EVV)** is a federal requirement to capture visit information electronically.

2 The **Sandata Mobile Connect (SMC) app** is the quickest method to capture your visit with check in and check out times.

When performing services that require EVV, employees log in to the SMC app at the beginning and end of their visit. The SMC app collects the required information—easy!

3 The **Sandata EVV Portal** is an administrative tool. Providers use this tool to make sure all information is accurate for visits.

Common Terms

- Client—A member or participant who receives services through the Medicaid program
- Employee—A person (worker) who provides care to one or more clients
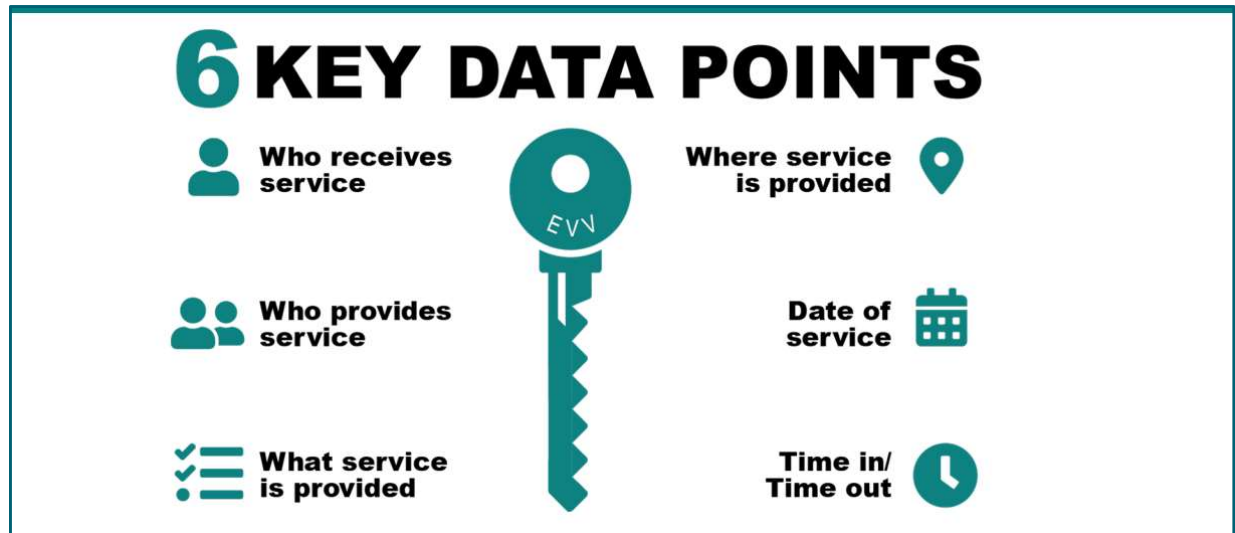- Company ID—The identification number of the agency in Sandata

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Finally:
4 The **client** is the member or participant who receives services through Wisconsin Medicaid.

5 An **employee** is a person or worker who provides care to one or more clients.

6 The **company ID** is the identification number of the agency and is used in the log in process for the SMC app. We'll learn where to get this number later in this training.

Let's talk a bit about what data EVV collects.

Federally Required EVV Data

6 KEY DATA POINTS

- Who receives service
- Where service is provided
- Who provides service
- Date of service
- What service is provided
- Time in/ Time out

5

EVV is a system that uses technology to record the date and place where an employee provides services to an individual at the start and end of each visit. These are the six Key Data Points that are captured. We will begin on the left column and work our way down.

Please note: EVV it is not a system that tracks location throughout the visit. Location is only captured at the start and end of a visit. Nothing is collected while the visit is happening.

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Get the SMC App

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SMC App

- The SMC app is available for Android or Apple devices.
- It is free to download from the Apple Store and Google Play.
- Search "Sandata Mobile Connect" and look for this logo:

Sandata Mobile Connect
Released July 2023
New version recommended

Sandata Mobile
Available
Through June
2024

Sandata has updated their app. Here's a snapshot of the two versions of the SMC app.

The old Version has the logo with a white background and gold arrow. Do not download or use this version. It will not be updated. As time goes on, you may find the app's performance diminishing.

DHS recommends switching to the new SMC app, with the dark blue background.

Of those of you who are currently using the app, how many of you are using this dark blue version? Please raise your virtual hands.

You can search in Google Play (for Android users) or the App Store (for iPhone users) for "Sandata Mobile Connect," find the new icon, and download it.

You'll be asked to reset your password. This new password will be used for any provider agency you work for that uses Sandata. This is a new feature that will be helpful for those of you working for more than one provider.

Feel free to delete the old version of the app, the white icon, as soon as you've downloaded the new one.

Today we will be looking at the new SMC version only. We recommend its use.

Learning Tip: Today, where you see an area to fill in or a button to tap on our app screenshots, give your brain a way to remember. Use your finger and touch that portion of the slide, as if it was your cell phone or tablet. This connects your brain to your muscles for better remembering.

Summary of SMC Changes
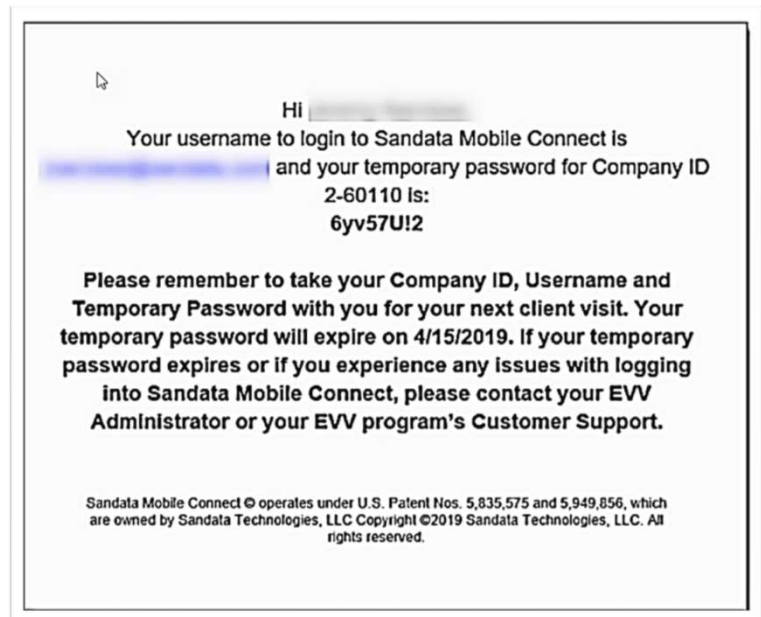
New features now in the SMC app:

- Autofill provider information
- One password for all provider accounts
- Easier password reset
- More obvious offline mode
- Home/community selection
- Switch services option
- Additional service codes
- Seven days of past visits
- Directions/call client option

Log in to the SMC App

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SMC Notice

- **Sandata will email the employee a temporary password and the Company ID.**
- **The same email address can be used for multiple agencies.**

Hi ▓▓▓▓▓▓▓▓▓
Your username to login to Sandata Mobile Connect is
▓▓▓▓▓▓▓▓▓▓▓ and your temporary password for Company ID
2-60110 is:
6yv57U!2

Please remember to take your Company ID, Username and Temporary Password with you for your next client visit. Your temporary password will expire on 4/15/2019. 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.

Sandata Mobile Connect © operates under U.S. Patent Nos. 5,835,575 and 5,949,856, which are owned by Sandata Technologies, LLC Copyright ©2019 Sandata Technologies, LLC. All rights reserved.

For brand-new employees, including independent nurses new to EVV: Here's how you get access to the Sandata app.

Your provider enters their employees' information into Wisconsin's ForwardHealth Portal, and that is sent to Sandata. If you are an independent nurse, you must add your information in the ForwardHealth Portal yourself. Sandata sends each employee an email.

Once you receive your welcome email from Sandata with your username (which is your email address; here, it's located in the blurred blue area) and temporary password, you are ready to sign in!

If you have not received your welcome email from Sandata, check your email's spam filter. You can also use your email's search feature to find the word, "Sandata." If you've not received this initial email, let your agency administrator know you still need to be added to EVV.

Independent nurses, a heads' up: You will get access to two parts of the Sandata system for your two roles:

> Sandata EVV Portal, for your administrative role
> Sandata Mobile Connect app, shown here, for your worker role

Make note of your emails and passwords for each part of the system.

EVV Customer Care can answer questions you or your agency administrator might have.
We'll share more about Customer Care in a bit.

You should be the only person who uses that email, since it will be your username in Sandata. If you work for more than one agency, you can use the same email address for each agency.

In the past, you would need separate passwords for each agency you worked for. This is no longer the case! The same Sandata password will work with every agency for an employee.

EVV Worker ID Card

Wisconsin Electronic Visit Verification

WORKER VISIT CARD

Wisconsin EVV Customer Care

📞 833-931-2035 ✉ vdxc.contactevv@wisconsin.gov ⏱ Monday - Friday 7am-6pm

Agency's Sandata toll-free numbers:

Agency/Company ID: 2-

Worker Santrax ID:

Sandata Mobile Connect Username:

Client Identifier:

Service Code(s):

Is recording tasks within EVV required?___Yes ___No

Service Code	SMC Service Code	TVV Service Code #
Personal and Supportive Care Services		
T1019	Personal Care Svc/15 min	10
S5125	Supportive Home Care/15 min	15
S5126	Supportive Home Care/Day	20
T1020	Personal Care/Day	25
Combo	Combo-PCS & SHC	30
99509	PCS Nurse Supervisory Visit/Visit	55
Home Health Care Therapy Services		
92507	Speech Therapy Individual/Visit	35
97139	Unspecified Therapeutic Procedure-OT/Visit	40
97799	Unspecified Rehab Svc-PT/Visit	45
Home Health Care Nursing Services		
99504	Mechanical Vent Care/Hour	50
S9123	Private Duty Nursing RN/Hour	65
S9124	Private Duty Nursing LPN/Hour	70
99600	Unspecified Home Visit-RN or LPN/Visit	60
T1001	Nursing Assessment or Eval/Visit	75
T1021	Home Health Aide or CAN/Visit	80
T1502	Med Admin-Oral, IM, Subq/Visit	85

P-02844A (10/2023)

www.dhs.wisconsin.gov/library/p-02844.htm

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Tip! The worker ID card is one of the best tips we have for you. It's available on the DHS EVV website to print out and fill in with the information the employee needs. The provider will have all this information. We'll see how each piece comes in to play as we go along today.

If you prefer to create your own resource to keep your information handy (such as a note on your phone, or a different printed form), you can use the Worker Visit Card to identify some of the basic information you'll need to have.

The box in the upper right corner is our QR code—a quick shortcut to get to this ID card on our webpage. Open the camera on your cell phone, aim it to the QR code box, and wait for a pop-up text box. Tap that pop-up text with your finger. It will take you directly to this webpage.

You can also use the web address at the bottom of this slide.

SMC App

- EVV identifies the location at the start and end of the visit. It does not track location before, after, or during the visit.
- Select "Allow While Using App."
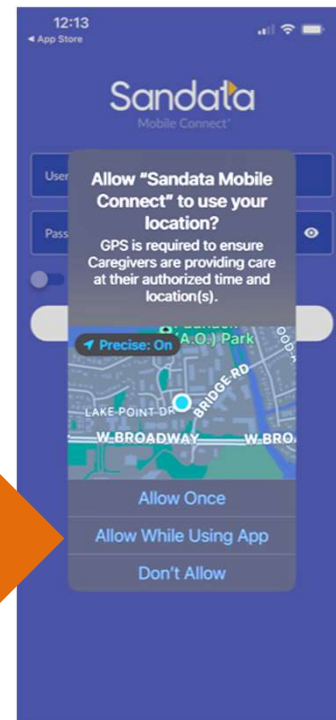
As with other apps, this question will appear when you first download the app: "Allow Sandata Mobile Connect to use your location?" We recommend selecting the Allow While Using App option.

I'll give you all a minute to touch the Allow While Using App button on this screen.

SMC App

- Username: Enter the full email address.
- Password: Enter the temporary password from Sandata.
- Company ID: Select your Company ID from the drop-down menu.
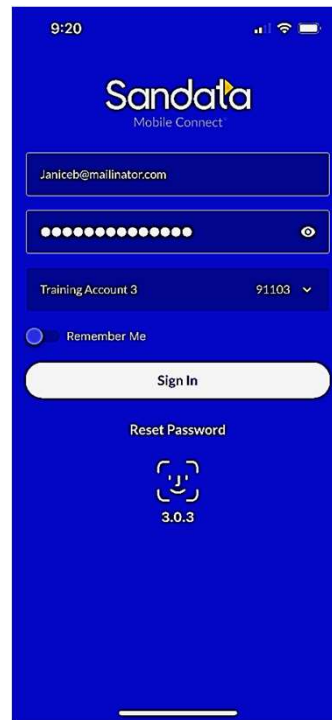
The first time you log in to the app, be sure to have Wi-Fi. This will save your settings. The app can be used without Wi-Fi after this first set-up use.

This is the first screen you'll come to when you first open the app. It will log you in as the "**Who** is providing service," which is one of the required data points we went through. Go ahead and use your finger on this slide as we go through each item you'll enter.

Your username: As we already saw, your username is the email address where you received the Sandata email.

Your Password: The first time you login, use the temporary password in the email from Sandata. You can copy and paste from the email, or carefully enter that temporary password here. That temporary password is for one use only—you'll be asked to reset your password in the next few screens.

Tip! Use the eye icon to see what you entered. Our arrow points to it here.

Company ID: When the app is used with Wi-Fi, this field will auto-populate with a drop-down of each company that is associated to the employee. If the employee is only with one provider, that one provider will auto display. This is one of the improvements to the app. Independent Nurses, this will show your business name.

Just above the Sign In button is the Remember Me option. This will automatically enter your username in the future. You'll still need to enter your password for good security.

You'll see on our screenshot here that this user's phone has the option to add face ID, just below the "sign in" button. Let's look at the next section for more on that.

Options and Settings

Once you're logged in for the first time, using Wi-Fi, you may want to access some different features within the app and within your device.

Touch/Face/Fingerprint Options

Your device may have one of these options for logging in.
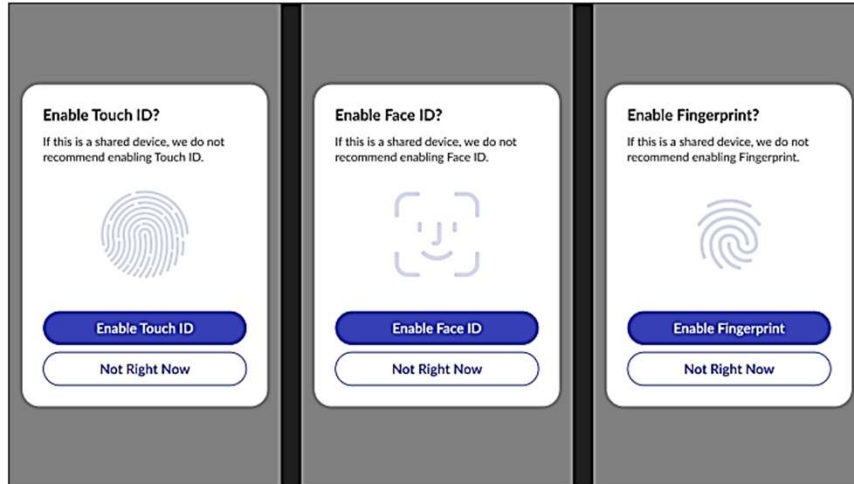
Some devices offer Touch, Face, or Fingerprint ID options to log in in addition to the normal password. You may follow the prompts to set up one of these options on your device.

None of these are required.

They are conveniences offered by a phone's technology, not by Sandata specifically. They are intended to make logging in to any app quicker by using information stored only in your phone. If you choose to use these technologies, you won't need to type in your password each time, but you'll still need to reset your Sandata password from time to time, as usual.

Once again, this is not required. It's your choice, and you can change your mind later in the Settings of the app itself. So, how do you get to Settings? Let's find out! Go ahead, Amber:

Settings

Use the ☰ menu icon in the upper left of your device.
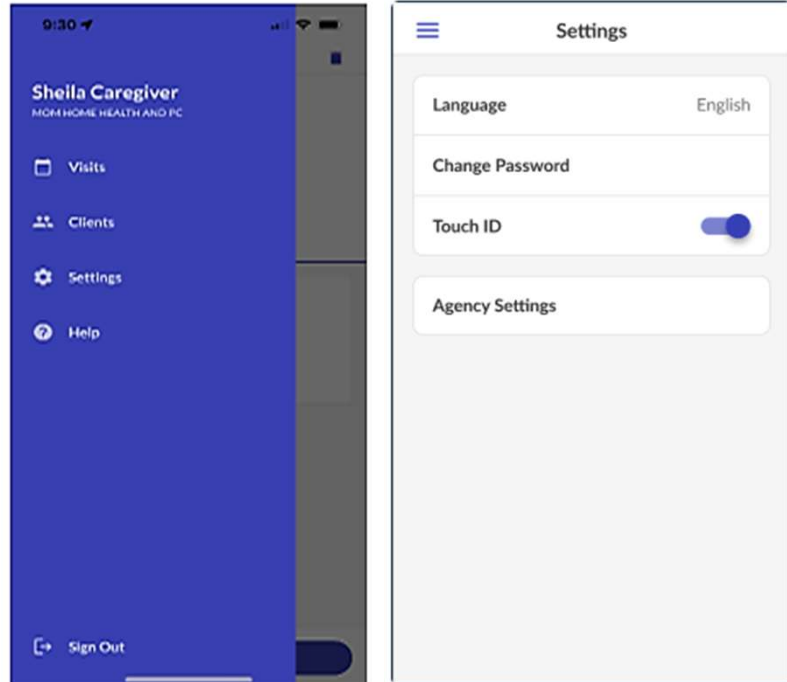
The three-lined icon in the upper left of the app screen is your menu. By tapping it—and for the sake of learning, go ahead and tap it on this PowerPoint screen now—you open these choices:

- Visits—Shows a list of past visits. You'll be able to see all visits from the last seven days. Until then, it will show the last five days.
- Clients—Opens up an option to search for a client to start a visit.
- Settings—As seen here on the right, this gives you the ability to change what language the app uses for you from a list of 16 choices You can also:
  - Change your password.
  - Decide to use Touch ID if your device has that technology (and remember, you'll still need to change your password from time to time as usual, but you'd be able to use your fingerprint for usual logins).
  - Take a look at what else is set up as "agency settings." These define how the app is set up by the Wisconsin Department of Health Services (DHS). They can't be changed but provide information for those who are curious.
- Help: If you are online, this will take you to a webpage with Sandata's SMC app training materials. You can type in a search phrase or tap an item from their list of topics.

Let's take a closer look at a popular choice, "Change password" next. Go ahead and tap on it in the upper right screen.

SMC Password

Passwords expire every 60 days. Employees can reset their own password from either:
- The Settings menu
- The Login screen

Change Password ✕

Current password 👁

New password 👁

Confirm new password 👁

Requirements
- ⊘ 12 or more characters
- ⊘ Uppercase letter
- ⊘ Lowercase letter
- ⊘ Number
- ⊘ Special character

Continue

You'll see here that it shows the requirements for the password on your device's screen and checks off the requirements when you meet them. This is the screen that displays if you choose Change Password from the Settings menu, or if you choose Reset Password before you log in.

For privacy purposes, the SMC app passwords must be changed every 60 days. The password expiration warning message will begin appearing 10 days before expiration. You can change it more often if needed.

Employees easily reset their own password from either the Settings menu, as we just saw, or the Login screen.

SMC Password

Employees have five attempts to enter the correct password before the information pop-up appears.
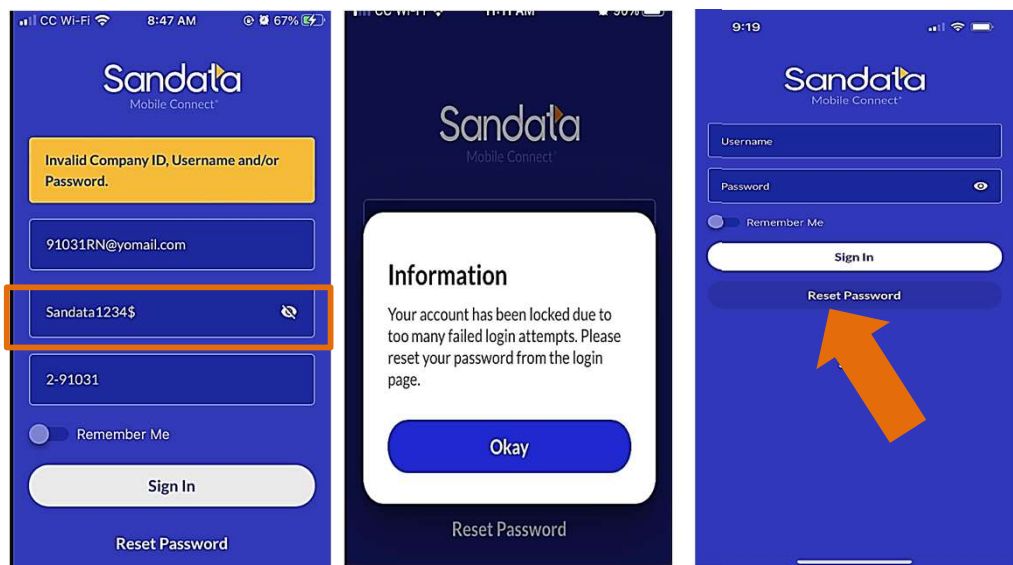
Sometimes, you may need to reset your password because you forgot it! You can always click the Reset Password link at the bottom of the login screen.

Employees have five attempts to enter the password correctly. It can help to use the eye icon next to the password to be able to see what you are typing each time.

Here's a tip: If you've had a few unsuccessful tries, tap **"Reset Password"** before your fifth attempt. This is the easiest way to reset a password and move on.

However, after you enter the wrong password the fifth time, you'll get the middle message that tells you to select Reset Password from the login screen. After so many wrong entries, you'll have a few steps to complete. You'll get an email with the subject line, "Sandata Mobile Connect Reset Password," and use the link there to reset your password. This method of reset avoids your **EVV administrator** or customer care needing to help you. It is another new feature in this new app.

For all of us who learn by doing: Take your finger and touch Reset Password on this slide. Remember, the easiest way is to use this option before the fifth attempt.

Device Settings

For top performance, make sure you receive updates to the app.

> ✈ CC Wi-Fi 🛜　　　11:02 AM　　　⏰ 89% 🔋
>
> ‹ **Back**　　**Software Update**
>
> Automatic Updates　　　On ›
>
> Beta Updates　　　Off ›
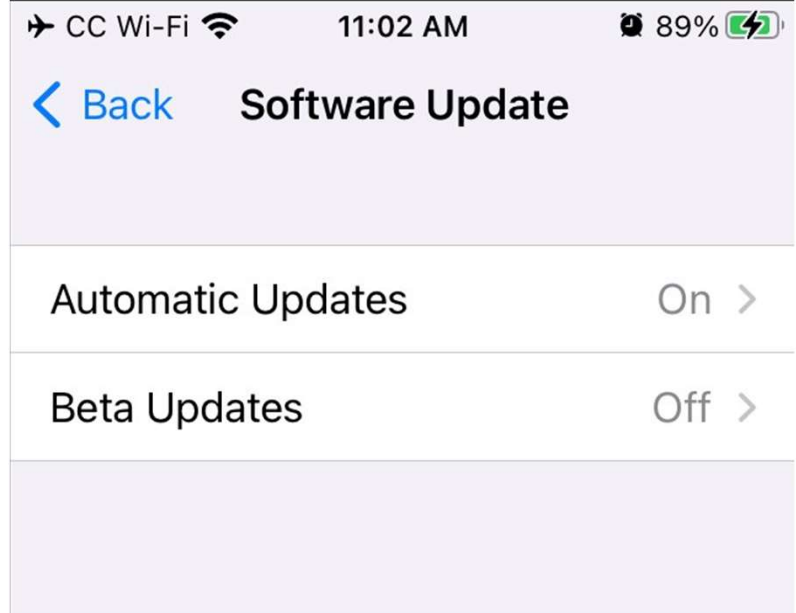
Let's look at some settings that may be on your individual device. The first is software updates.

As a general rule, an app works best when it is updated regularly. Our EVV Customer Care team has noticed that some app problems are quickly solved when the SMC app has all the updates installed. An app without updates may start feeling glitchy. You can prevent that!

You can do this in one of two ways:
- First: Through your device-specific settings, choose Automatic Updates. Here's a screenshot of what that might look like. Every device is different, of course, so become familiar with your device and its settings.
- Second: Delete and then re-install the app every so often. Monthly updates to an app are common. You can choose how often you'd want to delete and re-install to capture these updates. This won't change your app password or other settings.

Note – Either one of these will work. It is your choice.

Device Settings

Turning location services on for check in and check out is required.
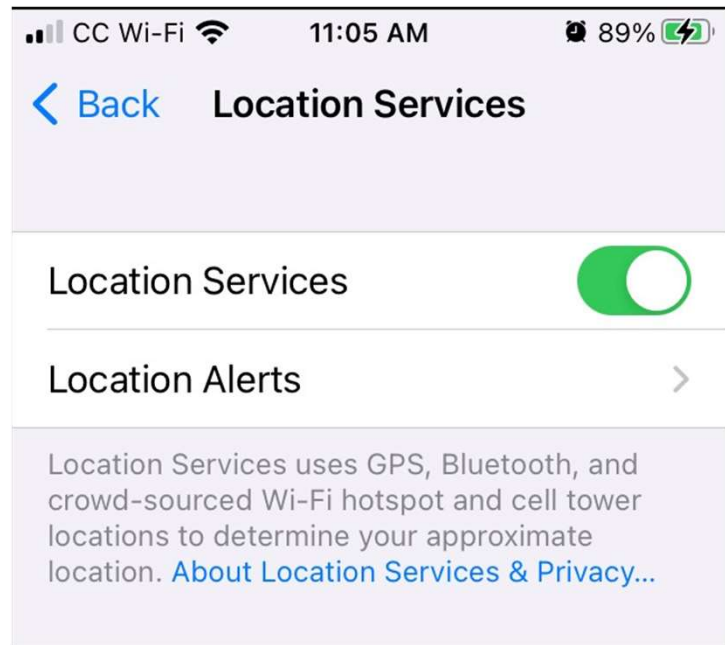
One final note about settings: devices will need Location Services turned on. This is only needed for the check in and out. It does not track location.

Tip: Does the app appear unresponsive? Check your Location Services setting. If your Location Services is turned off, the app won't advance beyond the login screen.

Start Visit

Disclaimer: All client information was created for instructional use only.

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That was some important information!

Let's look at how logging in for a visit will look once the app and your device are set up.

Starting a Visit

- Once logged in, search for a client by entering in their Client Identifier (six digits) or MA ID number.
- If a client cannot be found, an unknown visit can be started.
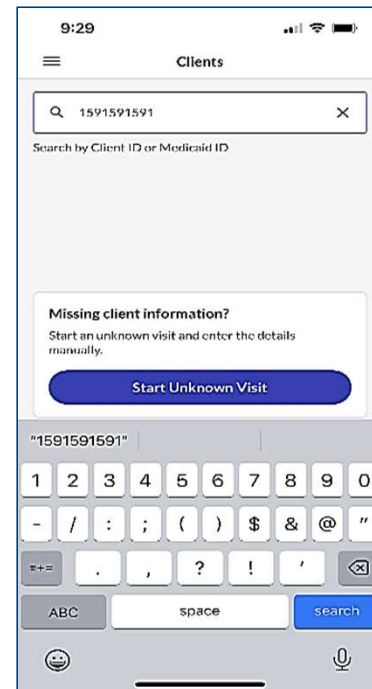
After you log in to the app, this Clients screen will be displayed.

The SMC app uses a six-digit client identifier to locate the client or participant. This represents "**who** receives the service" of the required key data elements. This six-digit client identifier can be found on the Worker ID card we referenced earlier in the training.

For all of us who learn by doing: Take your finger and touch the area where you'd enter the client ID. You want your brain and muscles to remember together!

If a client cannot be found or a Client's ID is not known, you can click the Start Unknown Visit button in the middle of the screen. Sometimes an Unknown Visit can be started when one of the conditions apply:
- The client's Medicaid eligibility is not on file yet.
- The authorization has not been sent to Sandata yet or the information is incomplete.
- The employee doesn't have the correct client ID.
- You are offline—more information on that in a bit.

Starting a Visit

- Once the client is confirmed, tap **Start Visit**.
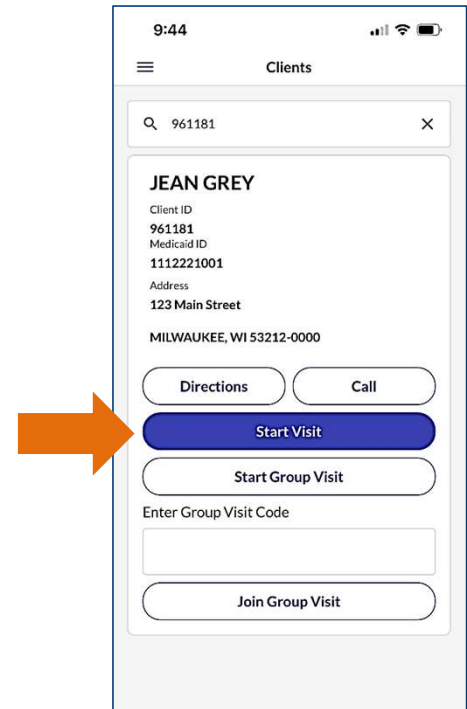
Confirm the Client information on the screen before you select Start Visit.

Take your finger and touch Start Visit on this slide.

Notice that there's a new feature here: if you have Wi-Fi service, you have the option to get directions to the client's address or call them. Convenient!

Starting a Visit

- Select the service being provided.
- Tap **Start Visit**.
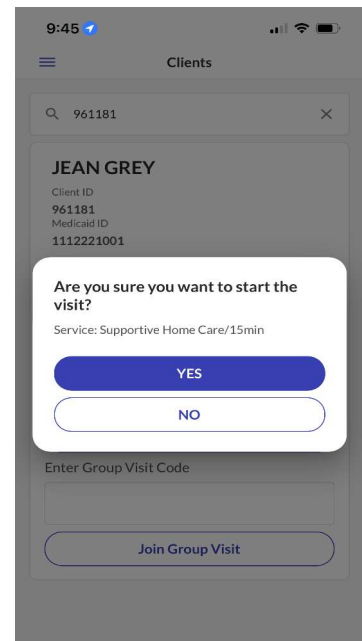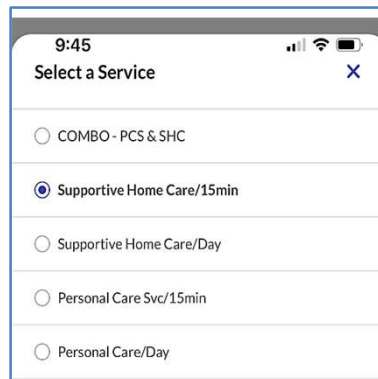
Services provided will need to be selected next. This captures "**what** service is provided," which is another of the key data points. Again, this is information the provider can make sure is on the worker ID card we talked about earlier.

Most of the time, you should see only the options used for that specific client.

Make sure the information is correct—in our sample, the sample (not real) client's name is "Jean Grey" and we're providing supportive home care services. This is the **who**, **what**, and **when** for the key data points. Tap Start Visit, and then Yes if all information is correct.

Take your finger and touch the Yes button on this slide. You want your brain and muscles to remember together!

Starting a Visit

- Choose Home or Community.
- Tap **Continue**.
- Tap **Yes**.
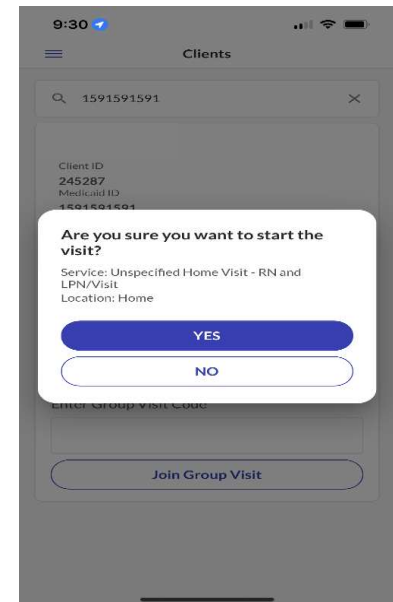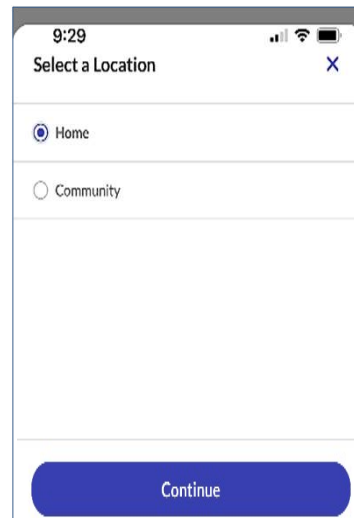
This next screen is also a feature as of December 2023.
Choose Home or Community for where the visit is starting.

Your provider should let you know if there are any guidelines to follow about providing services in the community. Some clients are part of programs that may limit this. The app will not flag these limitations.

Then tap Continue and Yes to start the visit.

Go ahead and tap those areas on this slide with your finger now: Home or Community, Continue, and then Yes.

Starting a Visit

- **Visit in Progress** will show at the top.
- At this point, the SMC app can be closed.
- SMC automatically closes after five minutes of inactivity.
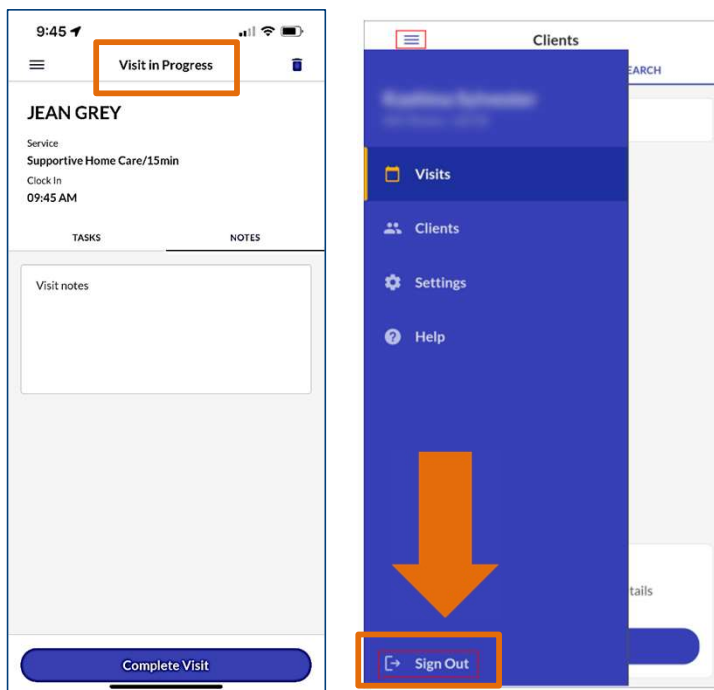
Now "Visit in Progress" shows at the top. You can see a clock-in time is displayed.

Make sure you've reached this confirmation screen before you switch away to any other apps or put down your phone, so you don't lose the information you entered. To protect client/participant privacy, the SMC app logs you out if you:
- Take a screenshot, answer a phone call, or open a new app like music, notes, or texts.
- Haven't used the app within five minutes.

That's it! So now you can close the app: The app doesn't need to be open during the actual visit. Simply go to the menu icon in the upper left and choose Sign Out. Go ahead and touch that now on this screen.

Complete Visit

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Complete a Visit

- Log in.
- Open the menu ☰ icon and select Visits.
- Use Upcoming tab.
- Tap on the visit.
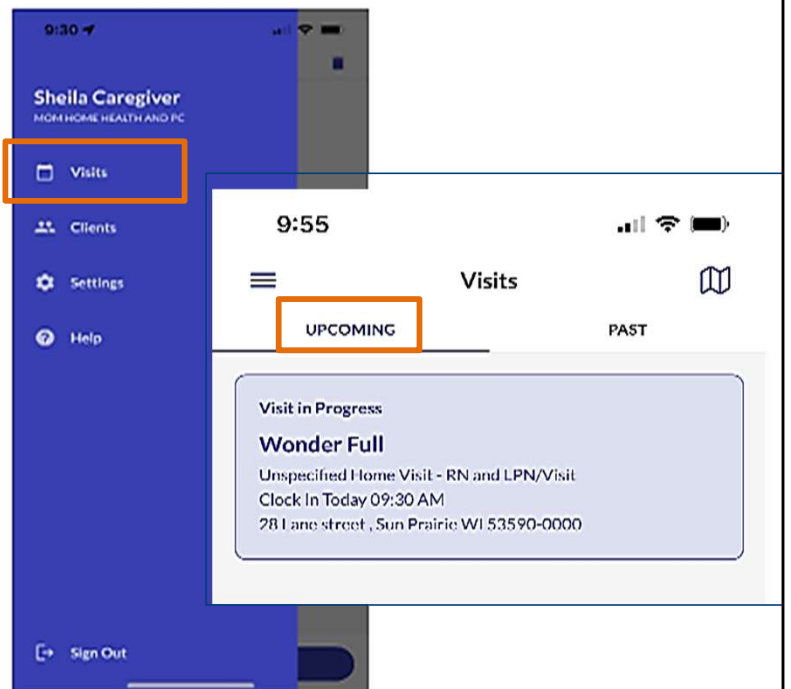
When you are ready to complete the visit, log back into the SMC app. Open the menu, as you've done before.

Get ready to touch the screen as I narrate here:
- Select Visits.
- Select the Upcoming tab,
- You'll see the client's information, Wonder Full, with a start time.
- Tap on the Visit in Progress box (light blue).

Complete a Visit

- Select **Complete Visit**.
- Select Home or Community.
- Tap **Continue**.
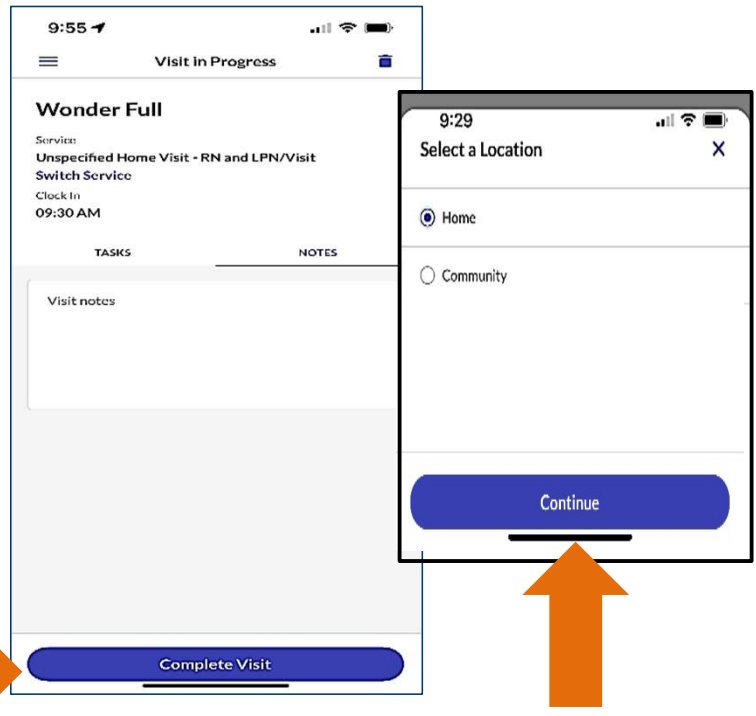
We're in the final quick screens now! With your finger, tap these buttons on this slide:
- Select Complete Visit.
- Just like during your start of visit, you'll be asked to select Home or Community for where you are at the end of the visit. This new feature will start mid-December 2023.
- Then Select Continue.

Complete a Visit

- Tap **Confirm**.
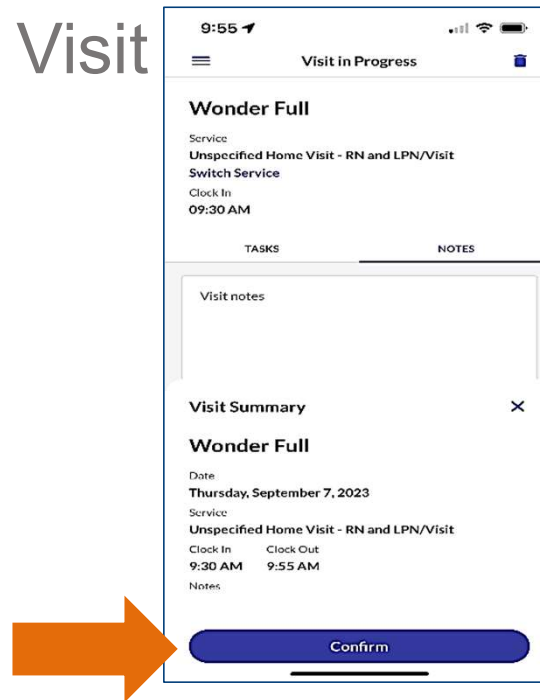
And now—with the clock-out time showing in the Visit Summary, tap Confirm.

If there's any correction needed for your time in or time out, let your provider administrator know. They can make the correction in the Sandata Portal. (For example, you forgot to check out at 10 a.m., but suddenly remembered at 10:30 a.m. and checked out then).

Abandon Visit Options

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Now let's talk about the Abandon Visit Option

You'll not use the abandon visit option very often, but it can be helpful. Let's say I'm working at Martha's house, but I forget to check out before I leave. The next time I open the SMC app—maybe when I'm trying to check in for a new visit at Scott's house—I'll see this screen and see that my visit with Martha is still "in progress." Uh oh! That's when I can use Abandon Visit. That will make sure my visit with Martha is saved, and I can start a new visit with Scott. I will also need to call my provider agency and let them know the time I actually ended my visit with Martha.

So this is used when you forget to check out at the end of a visit. It might happen, so let's look at those screens.

Abandon Visit Options

Trash Can Icon

- Tap the Trash Can in the upper right corner.
- Tap **Yes** to abandon the visit.
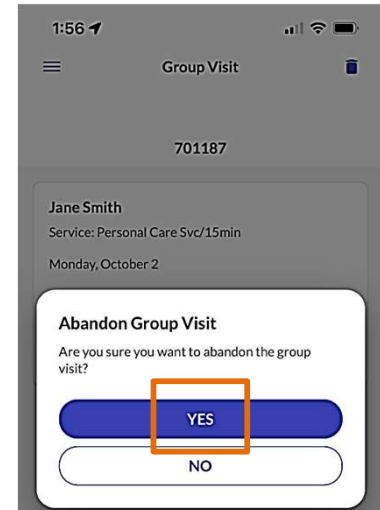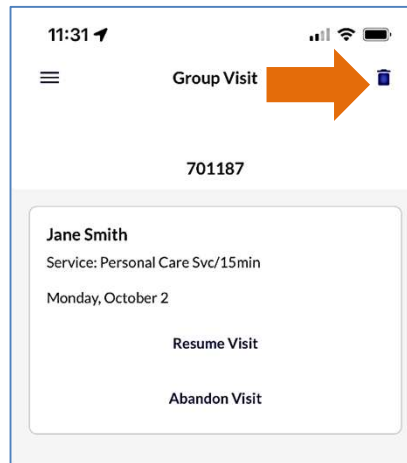
There are two ways to abandon a visit.

The first is using the trash can icon in the upper right corner of the screen. Our example here is from a group visit, but this can be done in any visit.

Then tap Yes to confirm.

Go ahead and touch those on this slide now.

Abandon Visit Options

In a Visit
- Tap the **Abandon Visit** button.
- Tap **Yes** to abandon the visit.
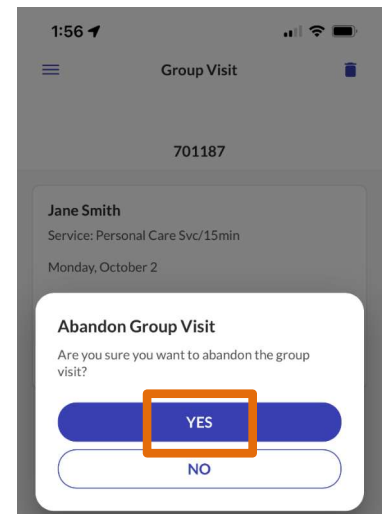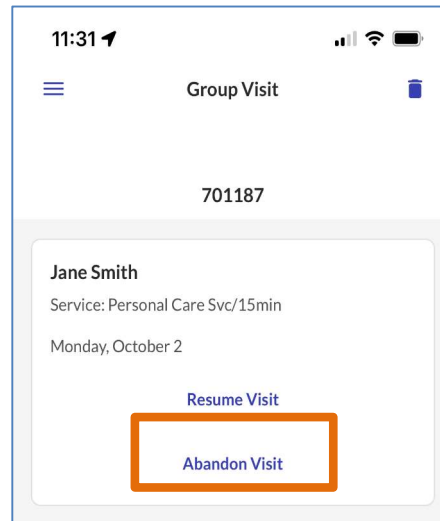
The second option, if you're in a visit (in this example a group visit), is using the Abandon Visit button. We have an orange square around it here.
Then tap Yes to end the visit.

Give that a tap on this slide's screen.

When SMC App Is Offline

Now What?

Disclaimer: All client information was created for instructional use only.

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No Wi-Fi? No problem! The SMC app does not require Wi-Fi or cell service. Let's look at how that works.

SMC Offline Mode

- Visits can be captured using the SMC app without Wi-Fi or cell service; this is called Offline mode.
- The **Offline** banner will display when working in offline mode.
- Log in as usual.
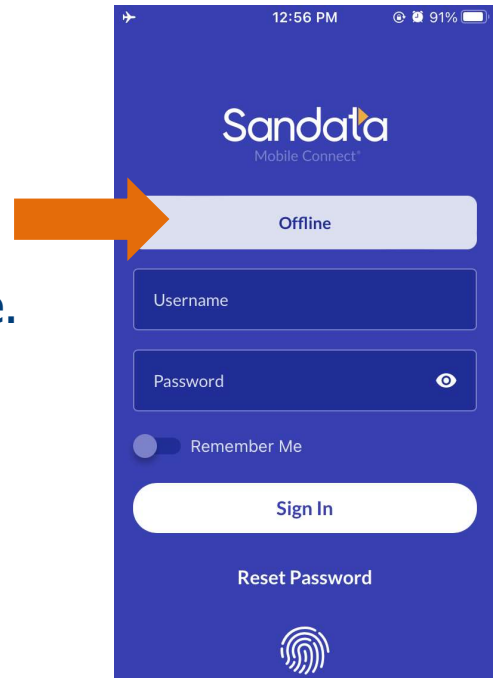
If an employee does not have access to Wi-Fi or cell service, a visit can still be captured using Offline mode.

You can see when you're in Offline mode because of the banner on top.

Tip: If the loading app just shows a circle that goes around and around and never gets to this log in screen, this means a cell signal is not quite strong enough to register, so the app keeps searching, searching, searching.

The solution is for you to "help" the app decide if it has enough signal by either (1) trying to improve the signal—for example, going to a window or porch for better signal or using cell data to increase the signal, or (2) setting the cell phone on Airplane Mode so there's no signal and the need for an offline visit is clear.

Log in as usual with your username and password. Then, when we have done this and tap Sign in, we see our next slide.

SMC Offline Mode

The Client Search field is not available in Offline mode. Therefore, the employee will need to start an unknown visit:
- The Client Search field is grayed out when in Offline mode.
- Tap **Start Unknown Visit**.
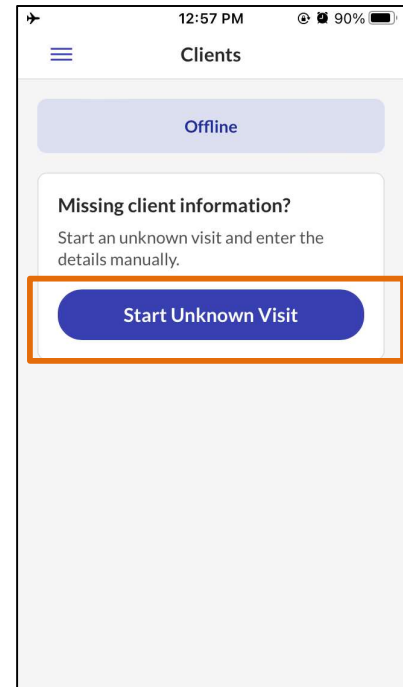
This screen is where the visit is just a little different.

In an Offline visit, the Client Search field is not available—it is grayed out. The remaining choice on the screen is to Start an Unknown Visit. Tap that button.

SMC Offline Mode

- Enter client information.
- Tap **Start Visit**.
- Start a Group Visit is not available in offline mode.
- The information will be visible to the provider the next time you log in with internet service.

Enter the information: the client's first and last name.

You'll see an area to fill in the client ID. The client ID is the best number to use. It is the number assigned by Sandata that the provider should already give to employees. (If you have the longer Medicaid ID number you could use that instead.)

Tap Start Visit. Like we saw before, you'll be asked to confirm, and you'll see the Visit in Progress screen. Success!

The steps for completing an unknown visit are the same as we've already shown.

A quick note: In Offline mode, The visit will not display to the Sandata EVV Portal your EVV administrator uses until you log in to the SMC app with an internet connection later. The information is sent at that time. That can be the same day or anytime within the next 7 days. If you work for an agency, please ask how soon they would like you to submit in internet service.

Employee Support

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EVV Training Resources

www.dhs.wisconsin.gov/evv/training-workers.htm

For anyone new to the EVV employee role or who needs a refresher on a specific EVV process or topic, there are plenty of training resources.

Either the QR code or link will take you to our DHS EVV Training Workers resources page. You'll find printable materials in English, Spanish, Hmong, and other languages, as well as training videos.

Switch Service Option

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Alright, now we're moving into slide that don't apply to Independent nurses, but could apply to others.
This is a feature that can be a great time saver for some of you.

Remember, "services" are those broad categories of care. Remember, "services" refer to the broad category of care you are providing. They are not the small, individual tasks (like helping with getting dressed or brushing teeth, for example) done during the visit and gathered on the personal care record of care.

Let's go through the Switch Service option.

Switch Service Option

- Open the menu icon and select Visits.
- Use Upcoming tab.
- Tap on the visit.
- Tap **Switch Services**.
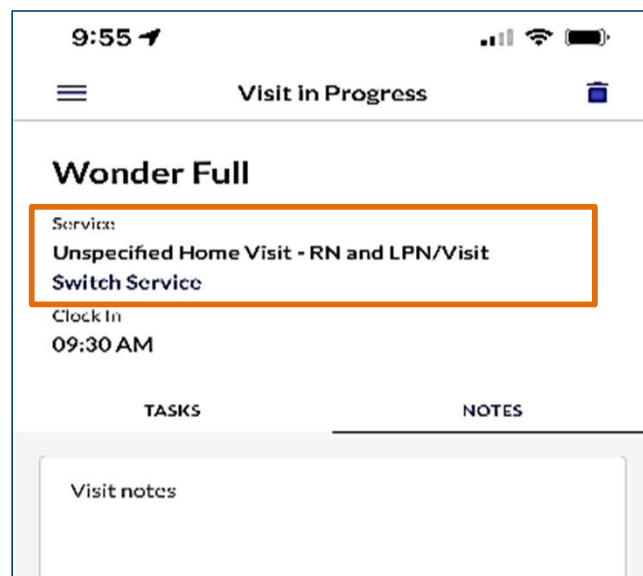
Some of you may be familiar with the Combo service code used in IRIS (Include, Respect, I Self-Direct). IRIS workers using Sandata can still use the Combo code when personal care and supportive care visits are combined. This new Switch Services option gives a convenient option to everyone.

It is a wonderful option, in fact, and so we have the client named Wonder Full. If you are switching from one service category (here, a home visit by a registered nurse [RN] or licensed practical nurse [LPN]) to another type of service in the middle of a visit, this is a convenient way to do so without starting from scratch for the new service.

Open the menu and go to the Upcoming tab to select the visit—all steps we've done before.
Now look for Switch Service under the client's name. Tap Switch Service. Go ahead and do that now with your finger on the screen.

Switch Service Option

Keep your finger ready! Here's what you'll tap next:

- When you switch services, you'll be asked to choose Home or Community for the service you ended.
- Select the location of the visit where the service was ended.
- Click Continue.
- Then select the new service type (in our example, the bottom service will be selected) and Start Visit.

Switch Service Option
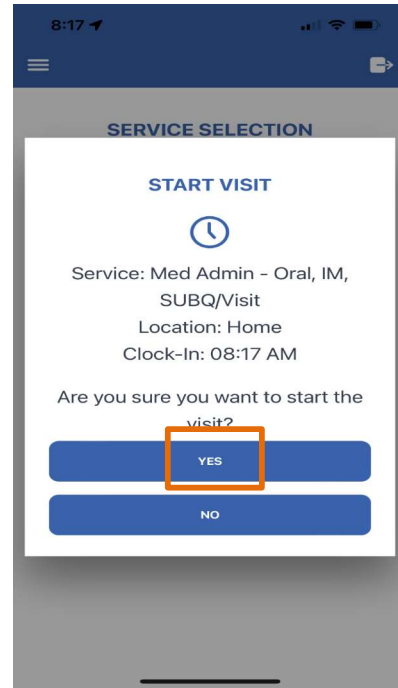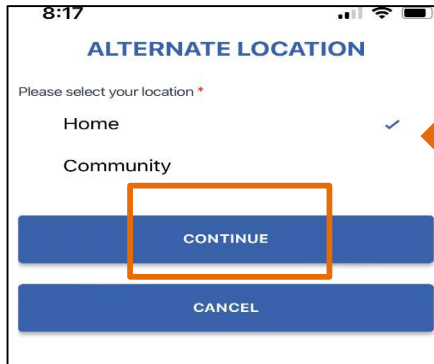
As usual, you'll be asked to select the location of the visit where the second service is starting. Then select Yes to Start Visit.

Switch Service Option
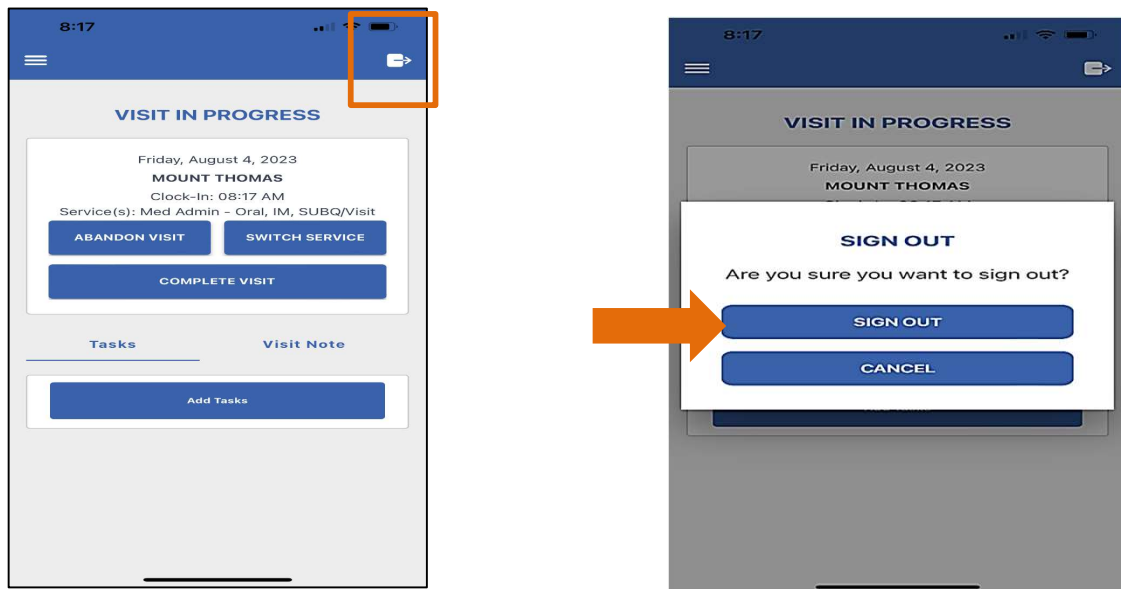
Success! The Visit in Progress screen displays! As usual, you can log out of the app while providing services. Tap on the door icon on the top right and tap Sign Out.

You can switch services as often as needed and end the entire visit as usual.

Group Visit Option

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Group Visit Option

A group visit allows a single employee to provide services in a group setting to multiple clients without having to check in and check out for each:

- Enter the first client's information as usual.
- Tap **Start Group Visit**.
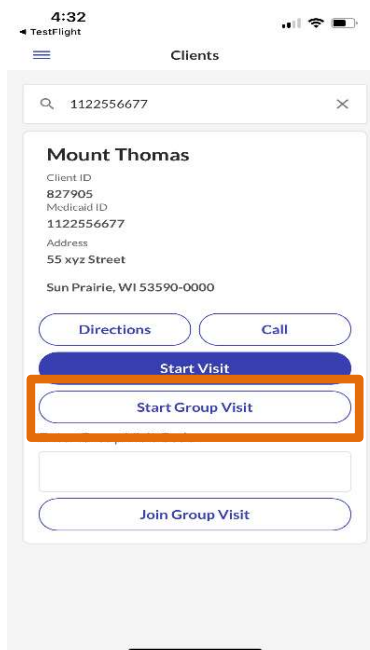
Your provider will tell you if you're able to use a group visit. If you are providing services to multiple clients in a single visit in the same location, and they have the same program payer and provider, you can Start a Group Visit.

Start just as you would any other visit: log in and enter the first client's information. This screen is where you would select Start Group Visit.

This gives you a visit foundation on which to add more clients.

Note the final option on the screen, Join Group Visit, shown here with the orange X is not used in Wisconsin to capture EVV visits.

Group Visit Option

- Select Service type and tap **Continue.**
- Select a Location and tap **Continue.**
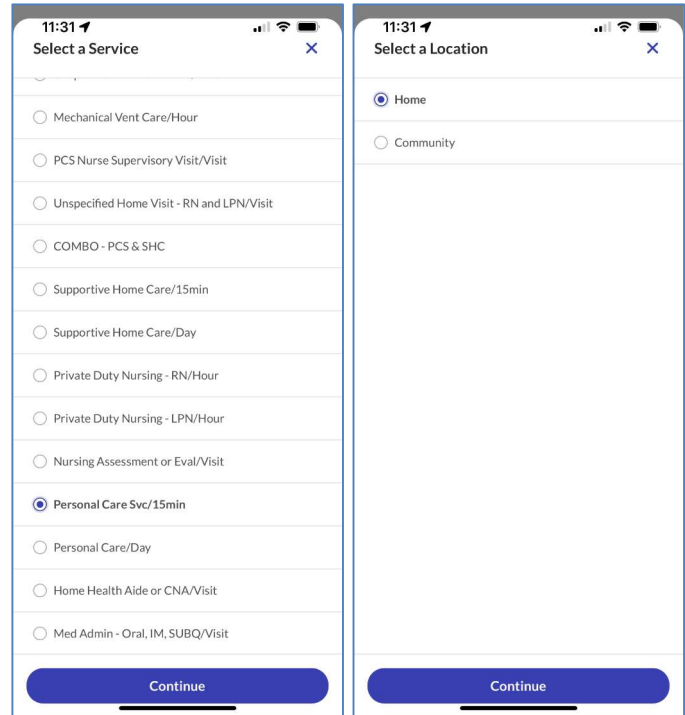
After starting the Group Visit, you'll be asked to Select a Service.
Select the service type and tap **Continue**.

Then you'll need to select a location, Home or Community, and tap **Continue**.

Group Visit Option

- Tap **Yes** to start the group visit.
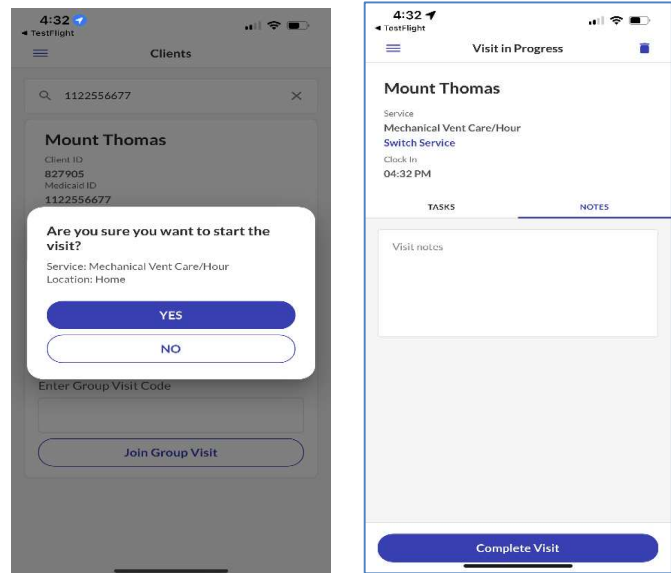
Next, you'll tap Yes to start a group visit.

Then you see the familiar screen on the right, showing the first client is entered.

Group Visit Option

- Using the menu, go to Visits.
- Select the Upcoming tab.
- Tap the Visit in Progress.
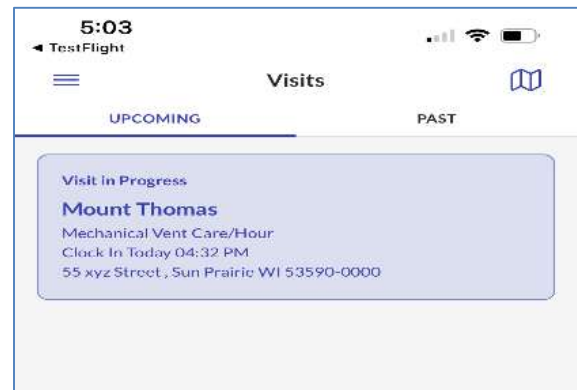
To continue, you need to use that foundation as your base:
- In the menu, go to Visits.
- Select Upcoming tab. You'll see that foundation visit you first set up.
- Tap on that visit in progress to open it up.

Group Visit Option

- Select **Add Client**.
- Type in the next client's Medicaid ID.
- Select **Start Group Visit**.
- Select the client's service code and location, as usual.
- Repeat for other clients.
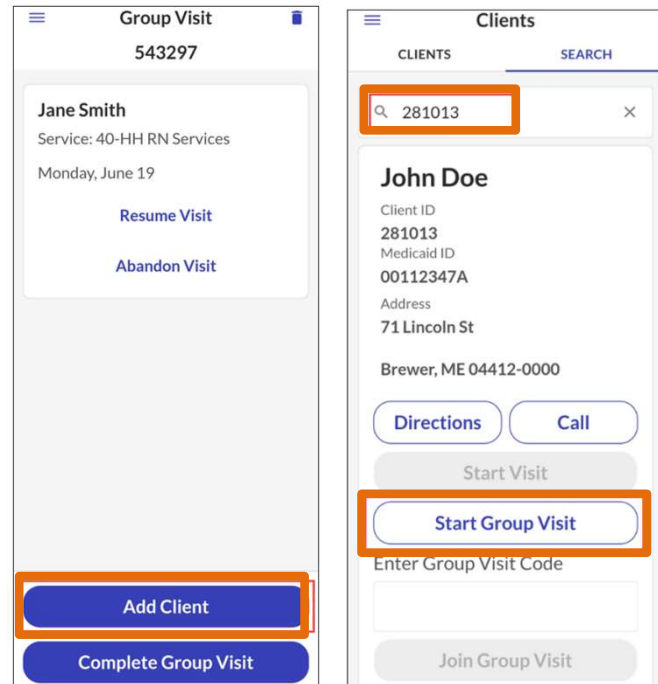
From there, you can add clients one at a time:
- Select Add Client.
- Type in the next client's Medicaid ID, as usual.
- Select Start Group Visit.

The screens we're already familiar with, to add the service and location (home or community), will be displayed next.

You can keep going back to this Visit in the menu to add as many clients as needed. New clients can be added at any time during the visit.

Group Visit Option

Ending the Group Visit can be done one client at a time or as a whole group:

- Tap on the visit.
- Select **Resume Visit** for one client at a time or **Complete Group Visit** for all clients.
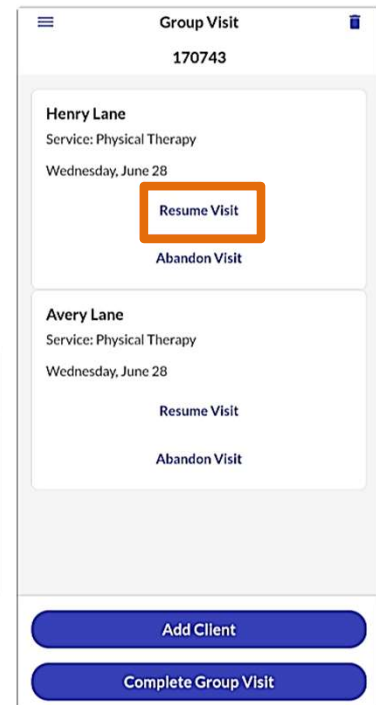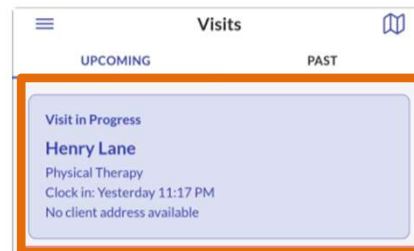
Ending a group visit can happen one-by-one or all at once. It starts out just as you would expect:

From the menu, select Visits, and the Upcoming tab. Tap on the visit. Each client will be displayed.

To end the visit one client at a time:
- Resume Visit means you'll resume gathering the end data for this client.
- Abandon visit cancels that visit for the client. You'll need to let your provider agency administrator know, so they can make corrections in the Sandata Portal.

To end all the clients' visits at the same time, select Complete Group Visit at the bottom of the screen.

Either way, you can expect the same familiar screens as ending any other visit.

Tasks and Notes Option

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Some providers are using EVV to collect record of care information. On the Worker ID card, the provider can list if tasks and notes are required in EVV or not.

If this is something you need to do, it is a few brief screens at the end of the visit. Let's take a look.

If your provider is not requiring it, you don't need to worry about these options.

Tasks and Notes Option

When ending a visit:
- Select Tasks tab.
- Tap **Add Tasks**.
- Select from the list.
- Tap **Done**.
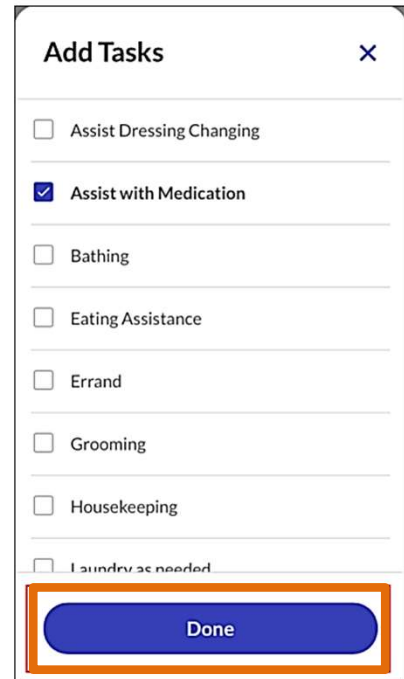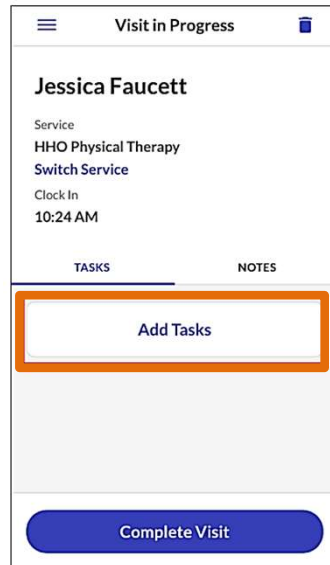
You'll recognize this screen as one of the last ones during the check-out process. You can see Visit in Progress at the top, and the option to Complete Visit at the bottom.

On this screen, if you are required to enter tasks and notes:
- Go to the Tasks tab.
- Tap Add Tasks. That will open a list similar to the one you see on the right.
- Select all the tasks done during the visit from the list.
- Select Done.

Tasks and Notes Option

- Confirm each task by tapping its circle.
- Select Notes tab if needed.
- Add notes.
- Tap **Complete Visit**.
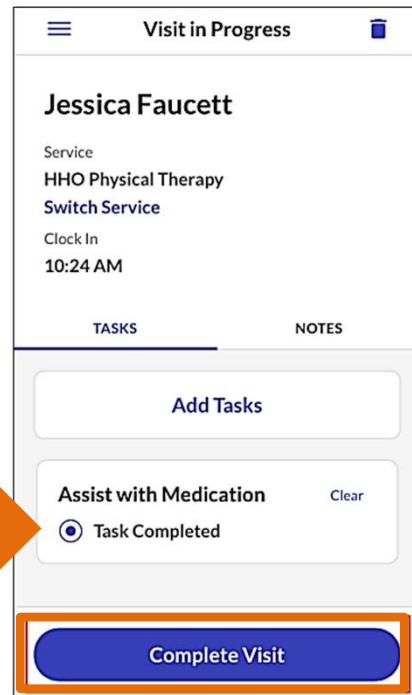
Next, you'll need to confirm each task by tapping the circle next to it. This helps prevent errors.

If you have notes to add, you can enter those next in the Notes tab.

From here, you're ready to select Complete Visit and end the visit as usual.

Client Verification Option

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This is for provider agencies who are using EVV to collect record of care information. If your agency is requiring tasks and notes are in EVV, they will also need the client to verify.

If this is something you need to do, it is a few brief screens at the end of the visit. Let's take a look.

If your agency is not requiring it, you can choose Skip buttons throughout these screens.

Client Verification Option

After the employee has entered the check out information:

- Tap **Continue**.
- Pass the device to the client.
- Choose language.
- Tap **Continue**.
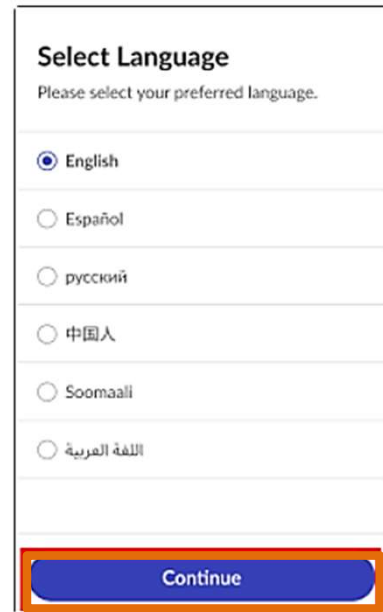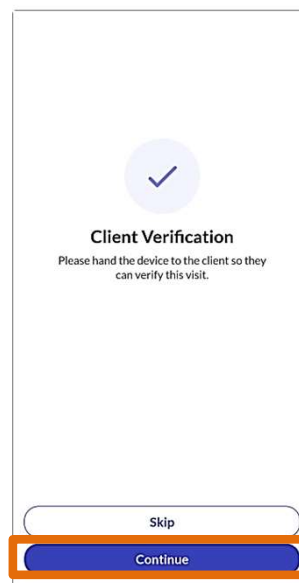
Every visit will show this screen at the end. As a reminder, if your employer does not require tasks, notes, and client verification with EVV, you can choose Skip here.

If you are required to gather tasks, notes, and client verification using EVV:
- Select Continue.
- Pass the device to the client for them to enter their information, beginning with the language they prefer.
- Tap Continue.

Client Verification Option

- Tap **Confirm** or **Deny** for each item.
- Tap **Continue**.
- Choose Signature or Voice Recording.
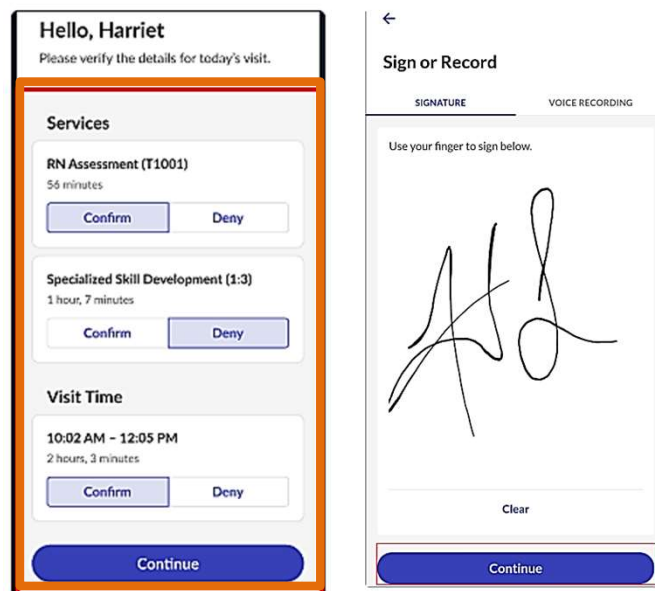
For each item listed, the client should tap Confirm or Deny, and then tap Continue.

This will bring up the next screen. A client may use their signature to verify (shown here), or on the next slide—

Client Verification Option

- **For voice recording, follow onscreen prompts.**
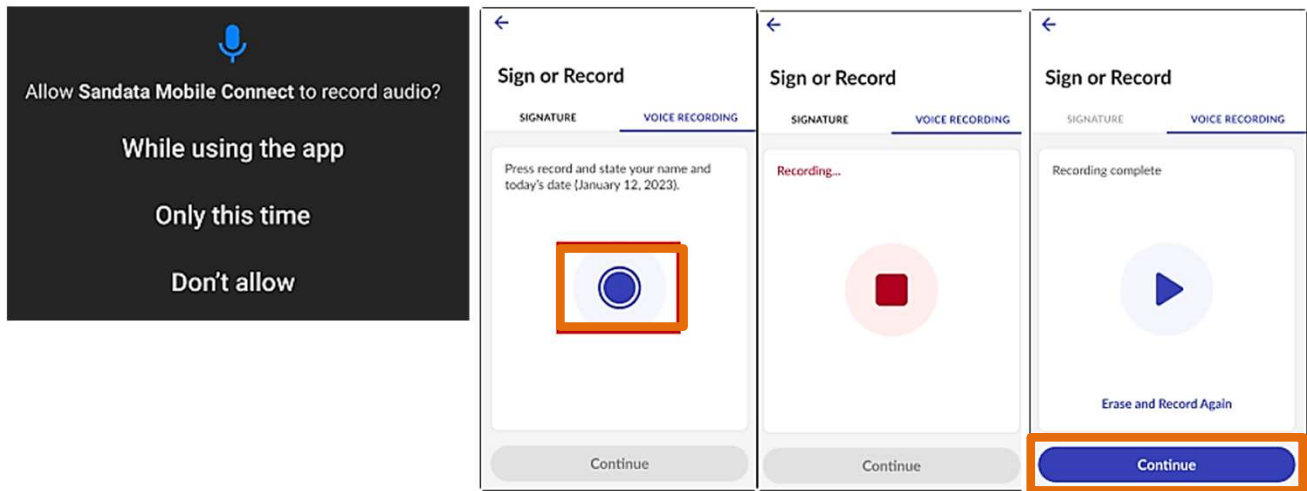
—use a voice recording of their name and date as verification.

- To start the voice recording, tap the blue circle.
- To end the voice recording, tap the red square.
- Tap Continue when done.

Remember, **if** your agency requires this information, you can use the voice or the signature option. If your agency doesn't require client verification, this part is skipped.

Client Verification Option

- Tap **Done**.
- Pass the phone back to the employee.

Thank You

Your visit is complete. Please hand the device back to your caregiver.

Done
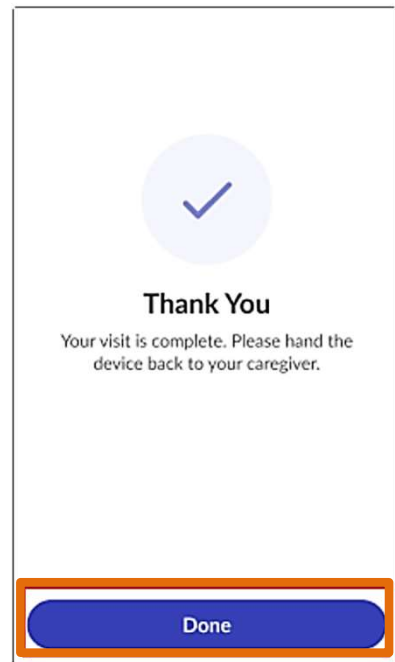
Those few steps are all it takes. Again, if your provider does not require client verification, you don't need to use these screens.

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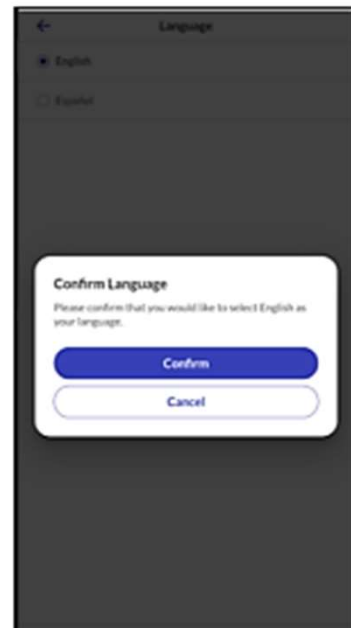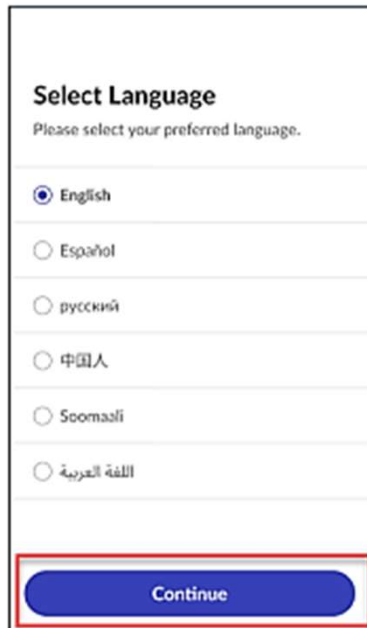
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Thank You

Please share your feedback
about today's session in a brief survey.

WISCONSIN DEPARTMENT
of HEALTH SERVICES

SMC App

- ## Select Language

You may want to set up a language other than English. To get there, will first be asked to select your preferred language from a list.

Then it's time to set up your new password and tap Submit. You will be taken back to the login screen.

Languages available: English, Egyptian Arabic, Burmese, Mandarin Chinese, French, Hindi, Hmong, Laotian, Nepali, Russian, Serbian, Somali, Spanish, Swahili, Vietnamese