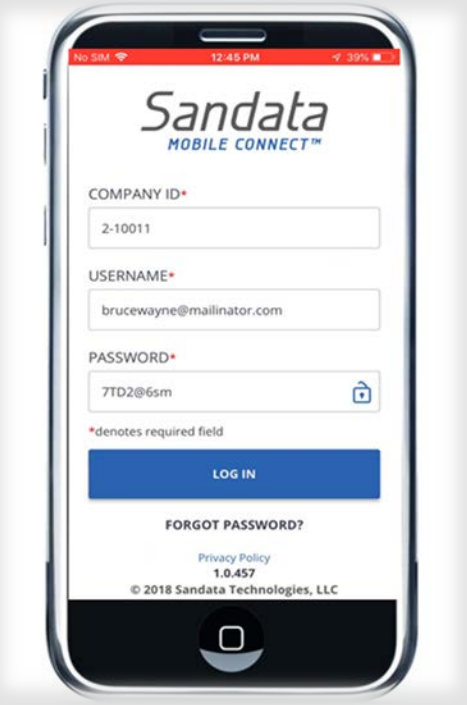
SANDATA MOBILE CONNECT

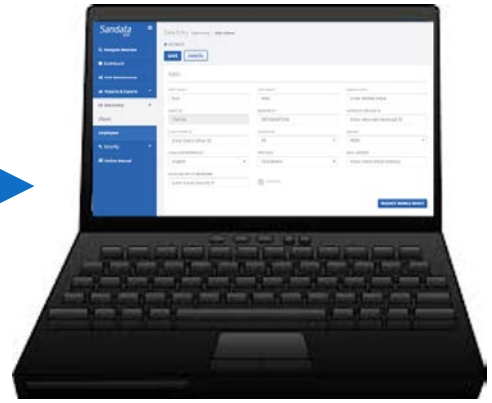
SMC

Sandata Mobile Connect (SMC)

for Clients



What We Will Cover



Overview:

- Overview
- The Roles in EVV
- How it Works

Employee:

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

Client & Employee:

- How to Verify a Visit

What is the Sandata Mobile Connect app?

Known as S.M.C.

- The Sandata Mobile Connect app is a computer program that runs on a mobile device such as a smartphone or tablet.
- The employee can download the mobile app to their smartphone or tablet and use it to record details about the services they provided during a visit.
- If the employee does not have a mobile device, they can use the telephone, known as the Telephonic Visit Verification (TVV) method.

Objective

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

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

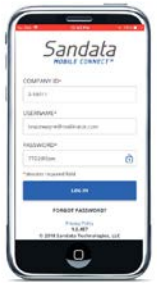
The Roles of EVV

- **Employee =**The Employee providing care
  - Clocks in and out using either the client's phone or Sandata's Mobile Connect app.
- **Client** = The person receiving care
  - Will use the EVV website to edit and approve visits.
- **Designee** = A client's representative
  - A person designated to handle the client's responsibilities when they are unable to do so.
- **Fiscal Intermediary** = ARIS Solutions

How it Works

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

- SMC uses either Wi-Fi or data to transmit information of the visit.
- SMC does NOT store any information on the employee's phone.
- A visit can be started and/or ended by using the app and/or the telephone method in combination.



- EVV is a web based system, nothing to install on your computer.
- Clients can view, edit and make changes to visits so they can be verified for payment.

Installing the SMC app

- The employee will be given the **Sandata Mobile Connect app Guide** with more in-depth details on how to use SMC.

- The employee will have access to take the online **Sandata Mobile Connect app** course to learn how to install, setup and use the app for visits.

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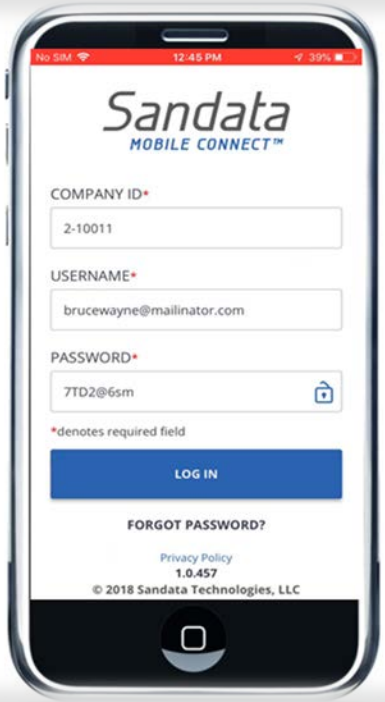
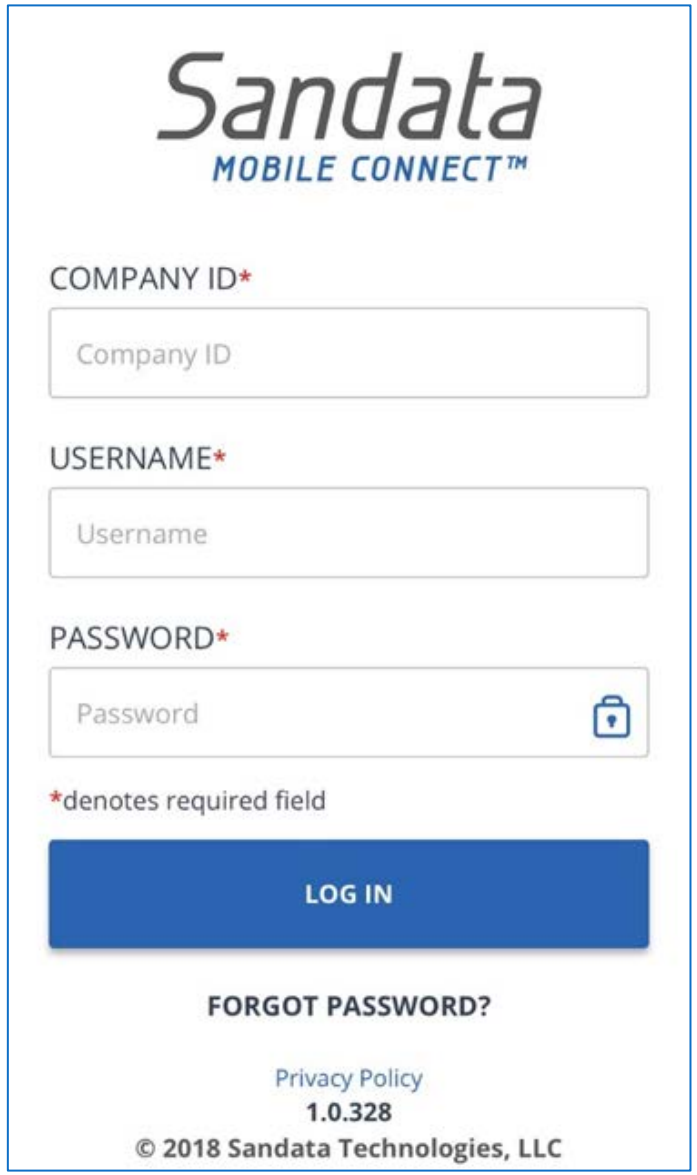
Logging in & Starting a Visit

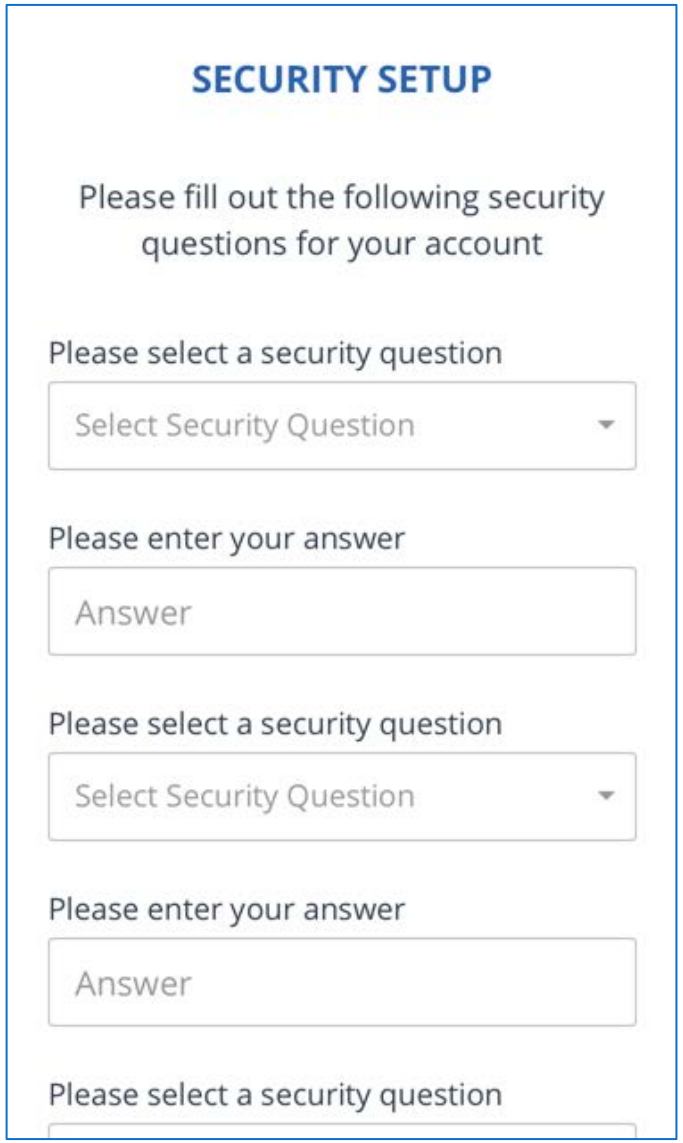


The employee will enter the following required information when logging into SMC.

- **COMPANY ID**
  - Client will provide this to the employee.
- **USERNAME**
  - The employee's email address.
- **PASSWORD**
  - The temporary password the employee received in their email after they completed their training.

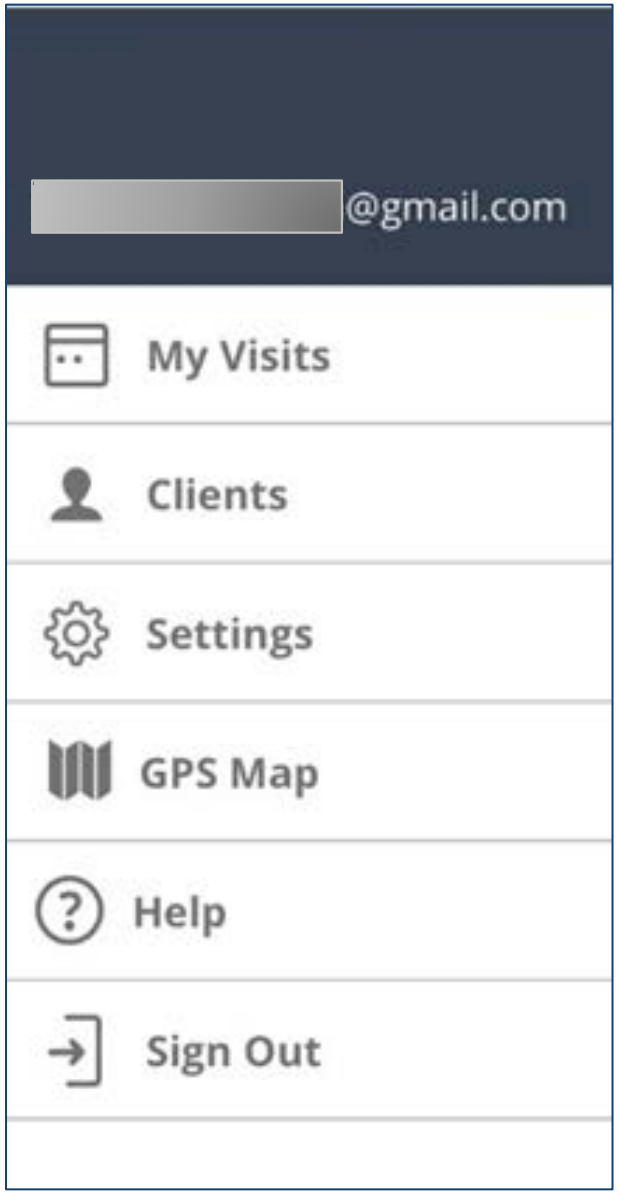


When the employee logs in for the first time to the SMC app, they will be prompted to setup their security questions and answers.



SMC MENU View

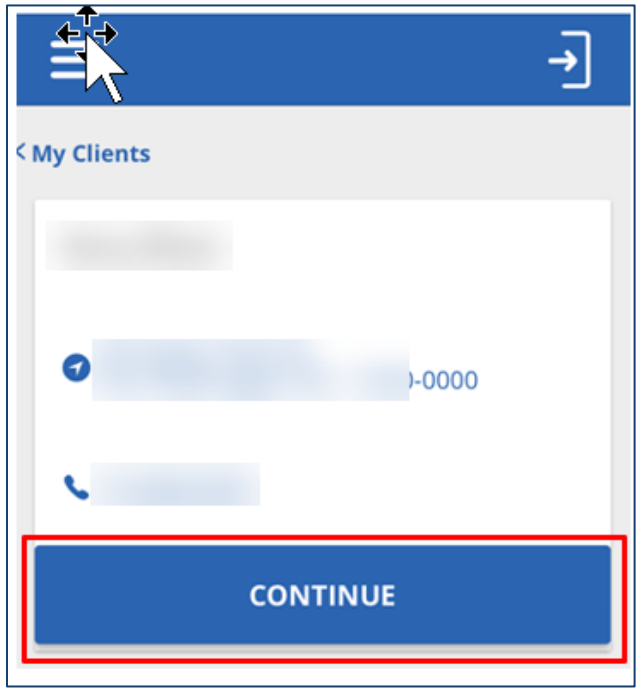
- **My Visits**
  - Displays visits
- **Clients**
  - Displays the screen
- **Settings**
  - Displays the **Settings** screen
- **GPS Map**
  - Displays a map with a pin at their current location
- **Help**
  - Displays the **Help** screen
- **Sign Out**
  - Logs out of the mobile app and displays the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



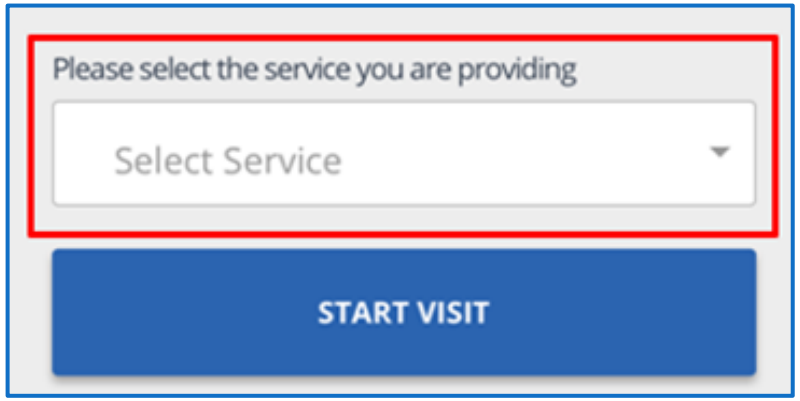
An employee will start a visit from the "**My Clients"** screen in SMC.

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

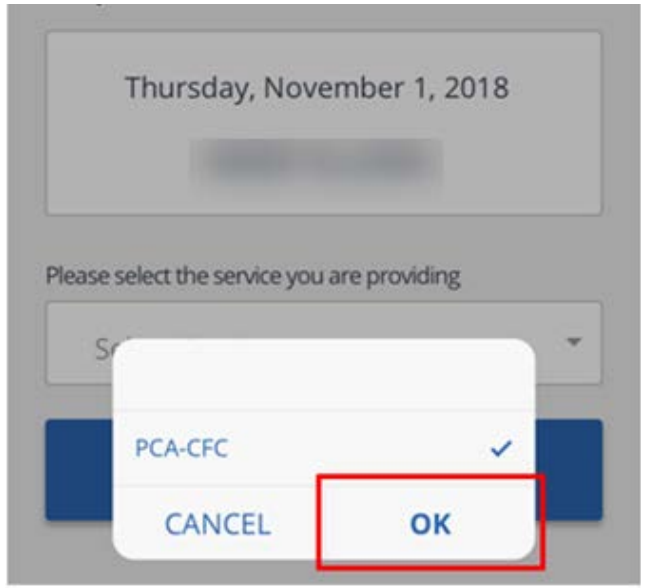
- Then tap **CONTINUE**



- They will tap **Select Service** and tap a service from the list.

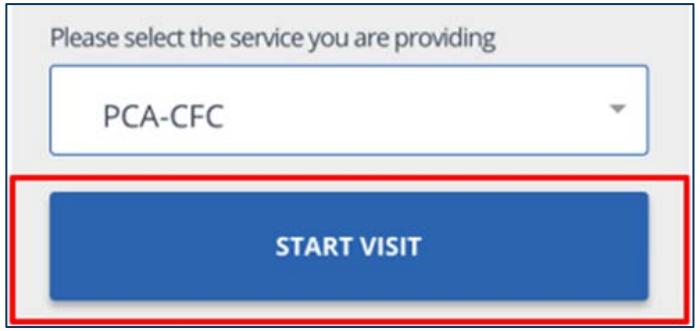


- There may only be one service to select.

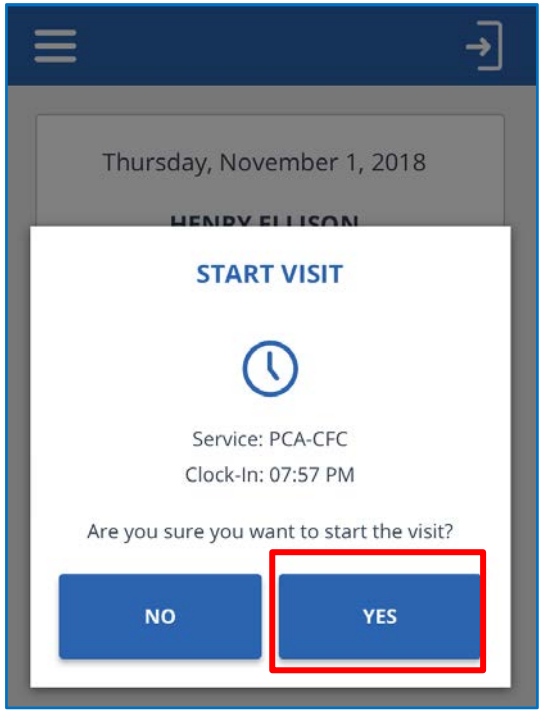


- Then they will tap **OK.**

- The employee taps **START VISIT.**



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



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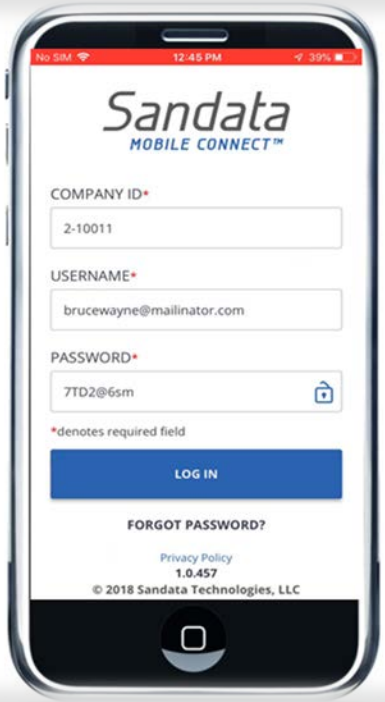
DEMO VIDEO

* Logging in
* Starting a Visit



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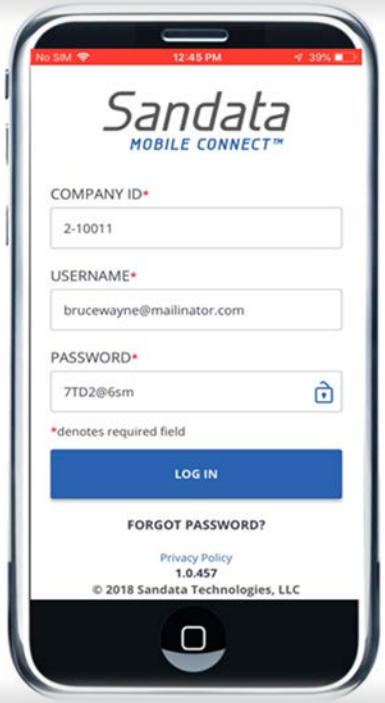
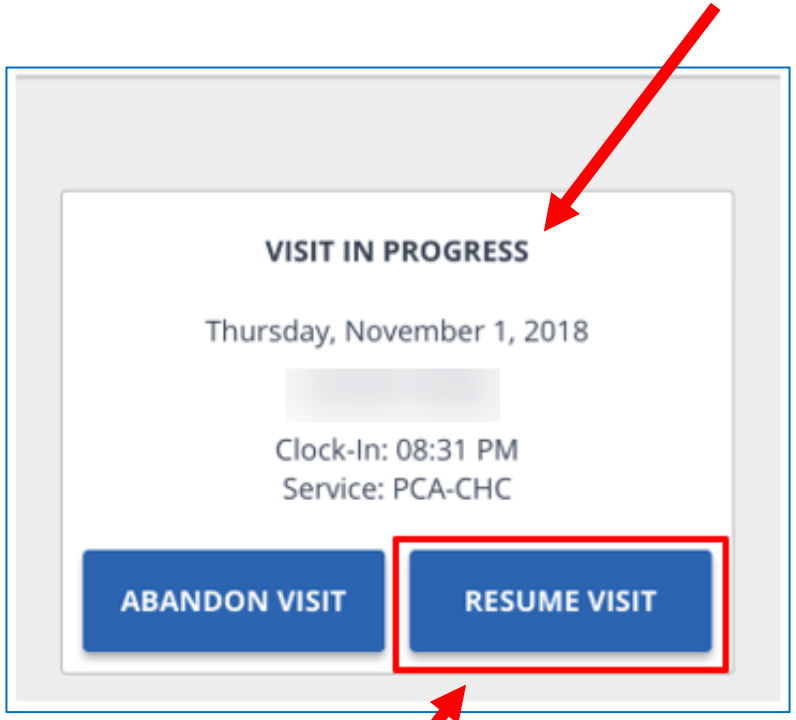
Ending a Visit



Ending a Visit

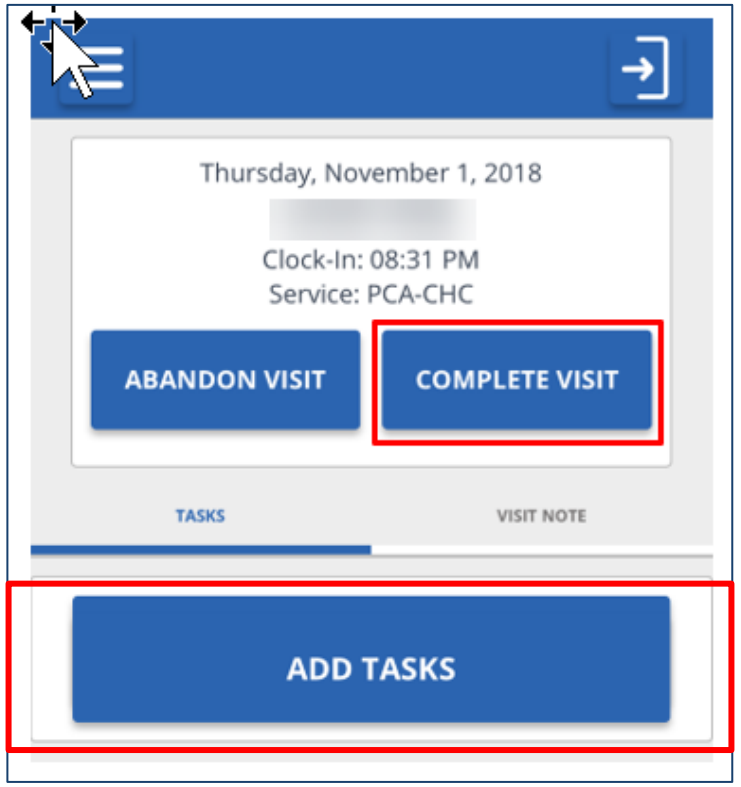
- The employee logs back into the SMC app.
- The visit will display as **VISIT IN PROGRESS.**



They will tap **RESUME VISIT**

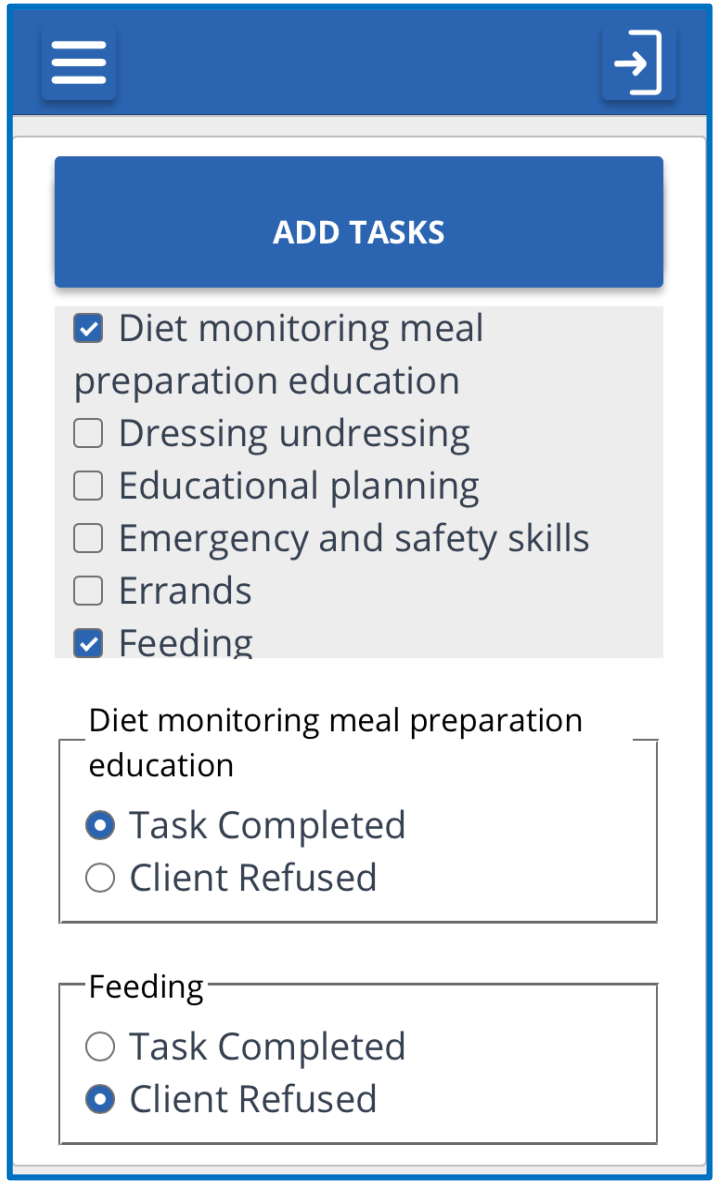
- The employee will tap **COMPLETE VISIT.**
  - The employee ***may*** be required to add at least one task.

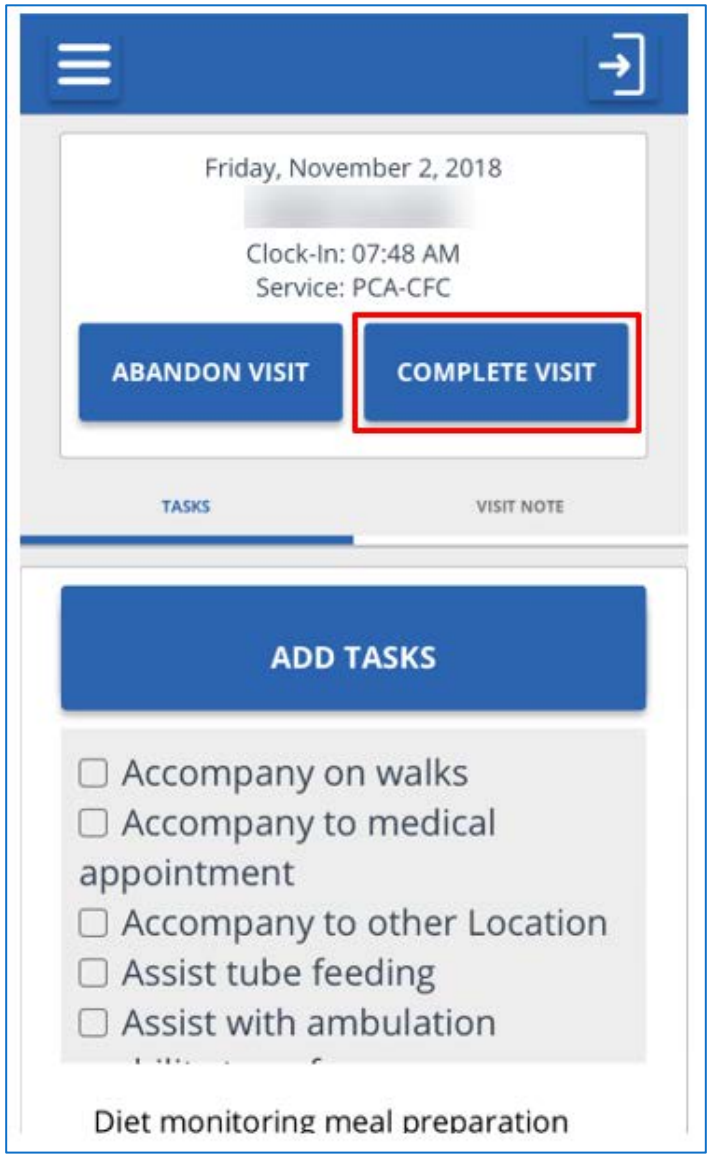
- Tap **ADD TASKS.**



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

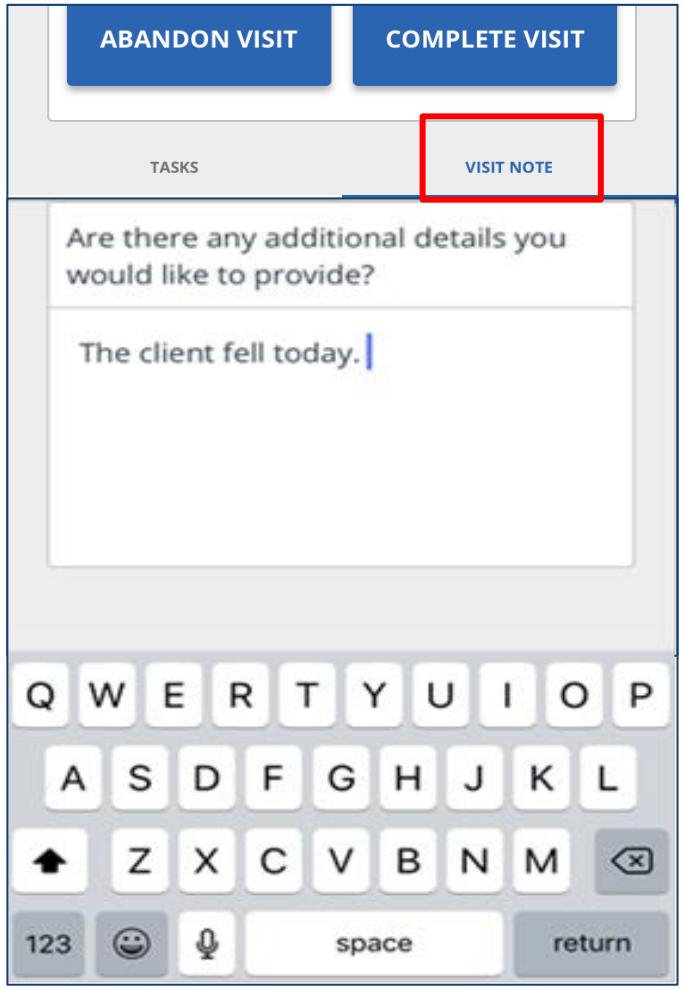
- **Task Completed** means the task(s) were completed during the visit.
- **Client Refused** means the task(s) was attempted during the visit, but the client did not want the task done.



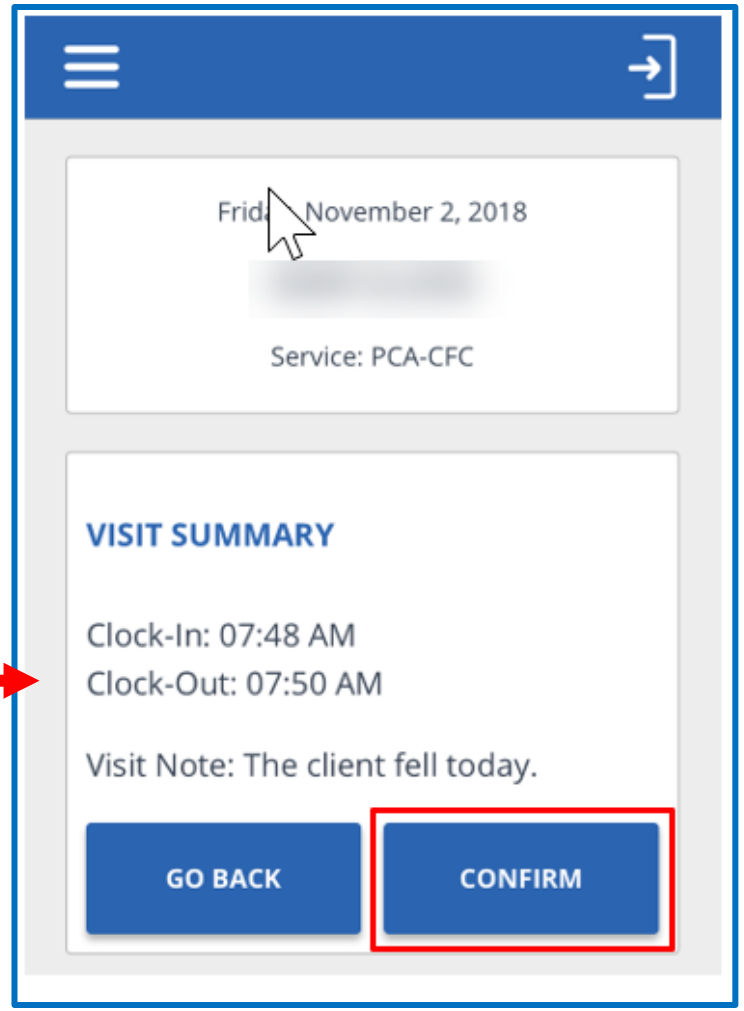


- They will tap **COMPLETE VISIT** when done.

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



- The employee should review the information.



- Then tap **CONFIRM.**

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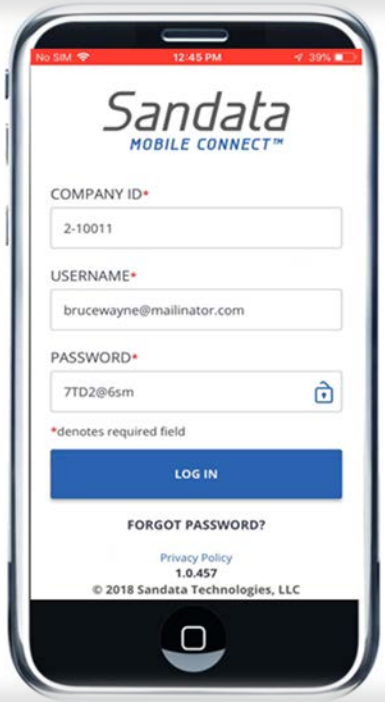
DEMO VIDEO

* Ending a Visit



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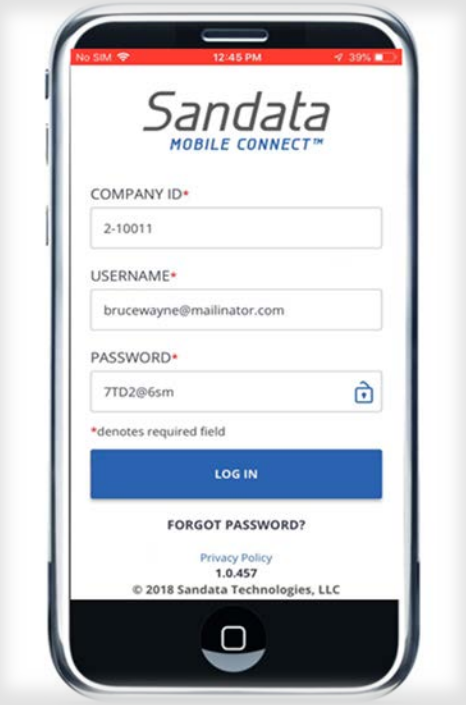
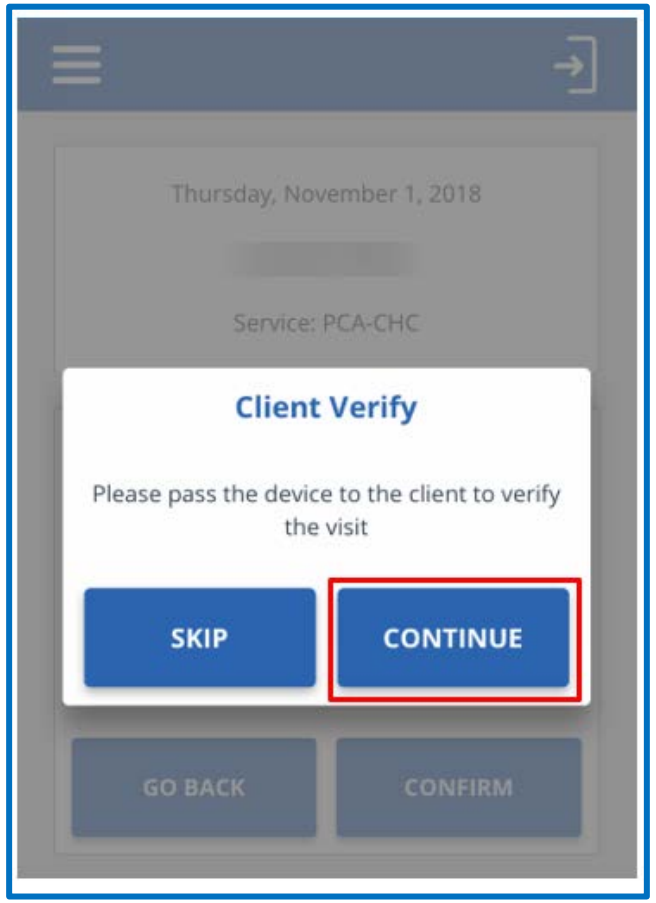
Client Verification

*Audio

*Signature

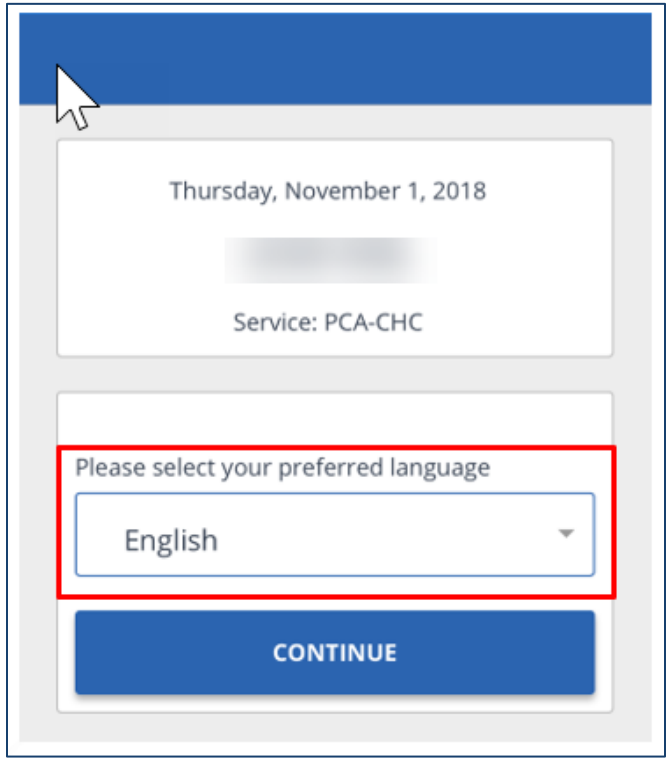


The employee will tap **CONTINUE** and pass the mobile device to the client to verify the visit.

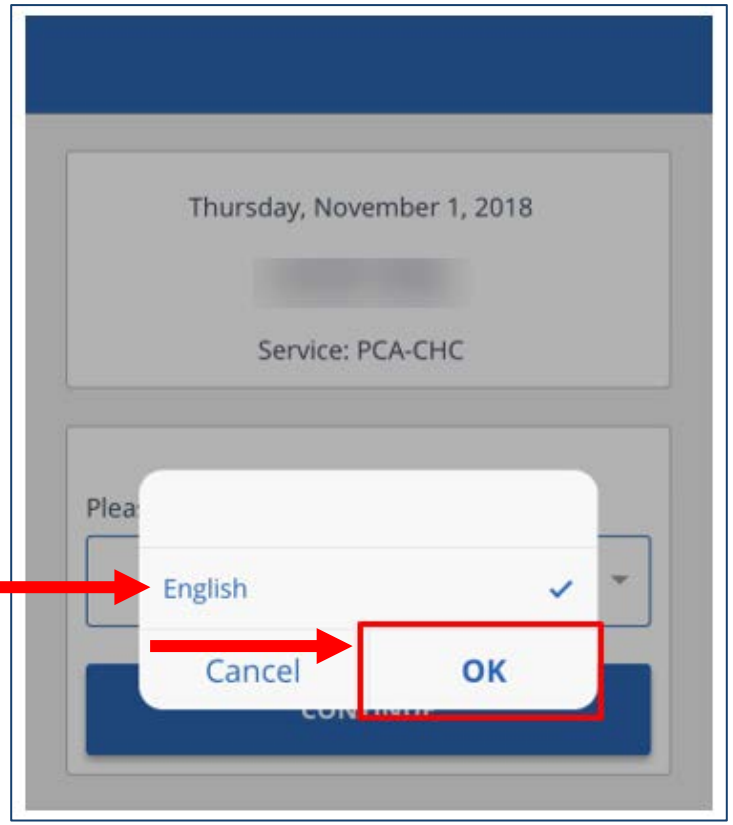


- The client will need to select their preferred language by tapping the Language field and selecting their preferred language.

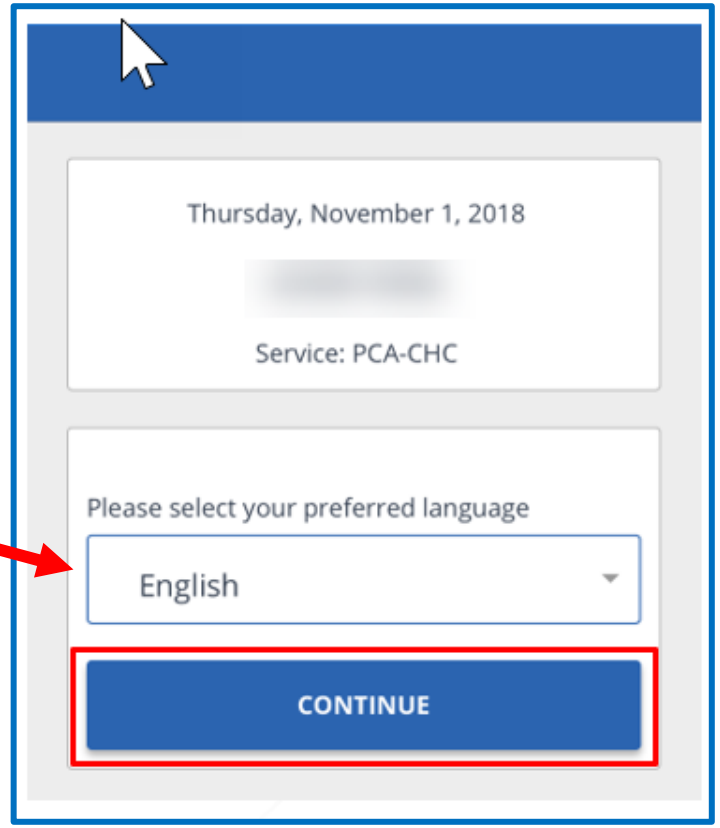
**** English may be the only language in the list***



- The client will tap once on the preferred language, then tap **OK.**



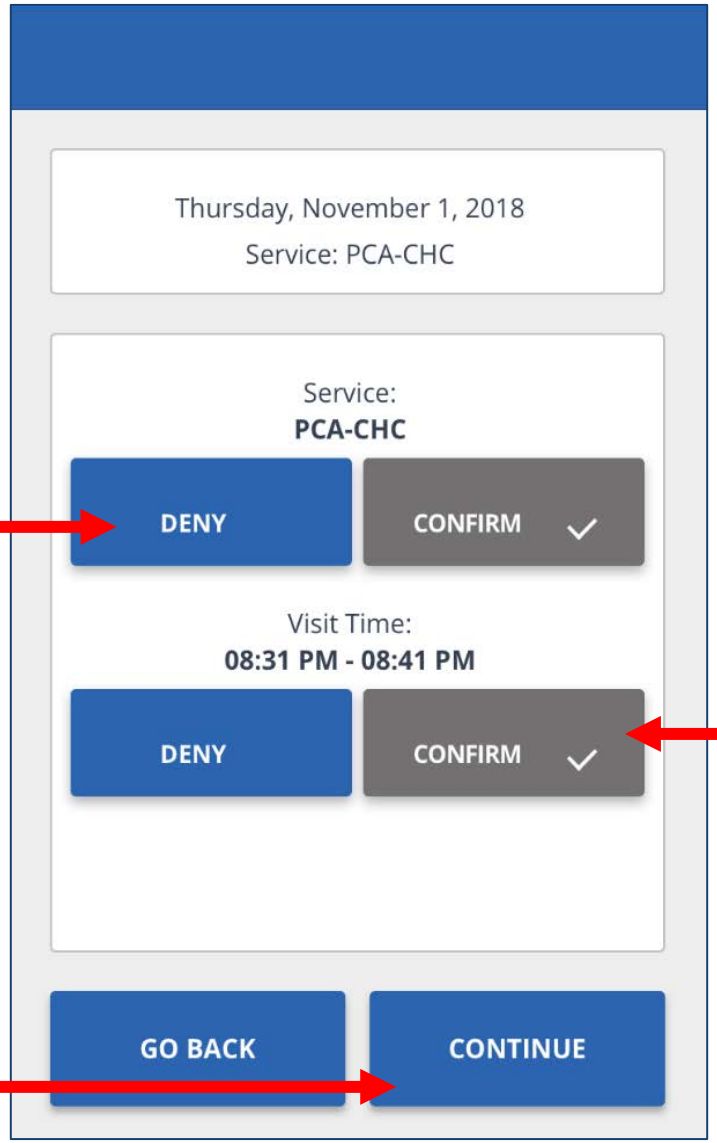
Selected language



Tap **CONTINUE**

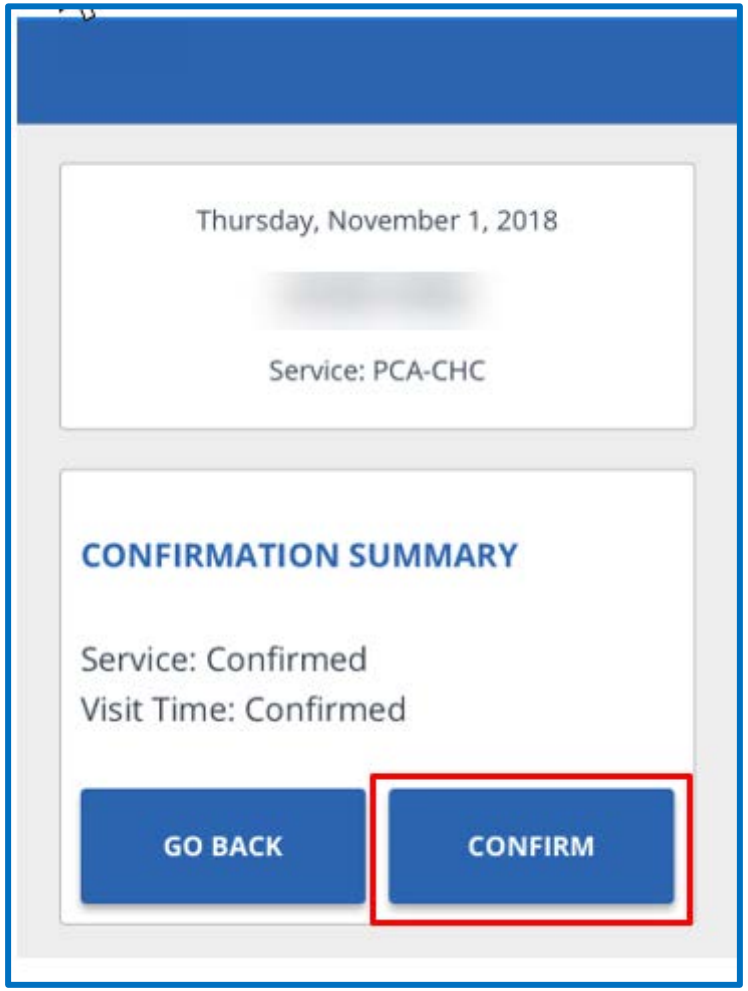
The client must tap either **CONFIRM** or **DENY** to approve or reject **Services** and **Visit Time.**

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



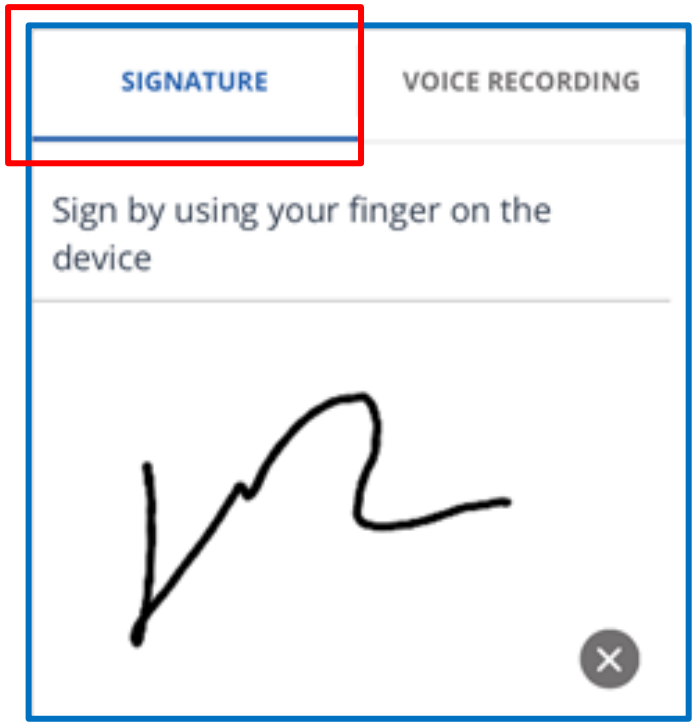
If employer taps **CONFIRM**, it means they agree the visit start and end times and service(s) were performed.

- Tap **CONTINUE**


Thursday, November 1, 2018
Service: PCA-CHC
CONFIRMATION SUMMARY
Service: Confirmed
Visit Time: Confirmed
GO BACK
CONFIRM

- Tap **CONFIRM**

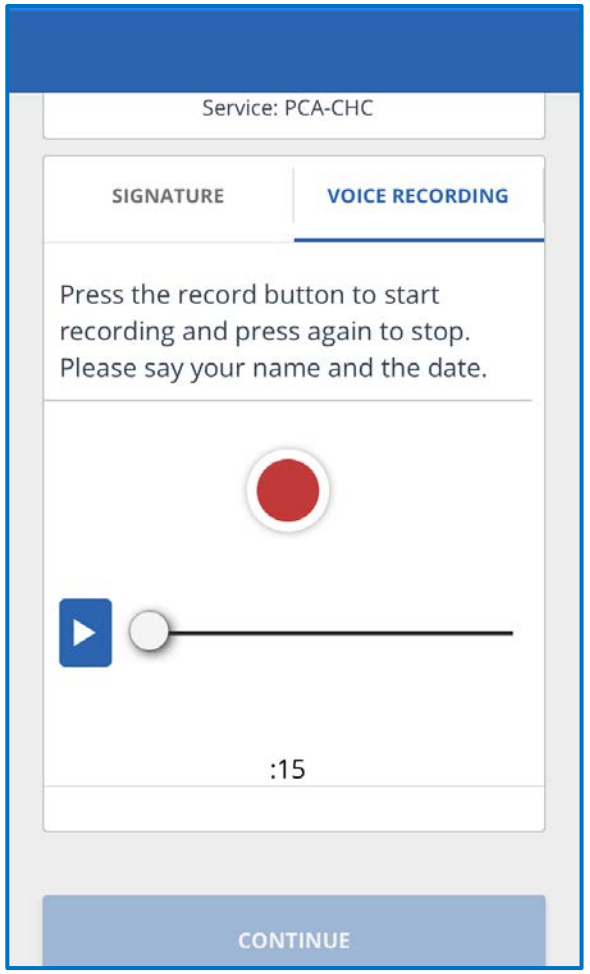
- The client will tap either **SIGNATURE** or **VOICE RECORDING.**
- If the employee taps **SIGNATURE**, they will sign the device using a finger and tap **CONTINUE.**



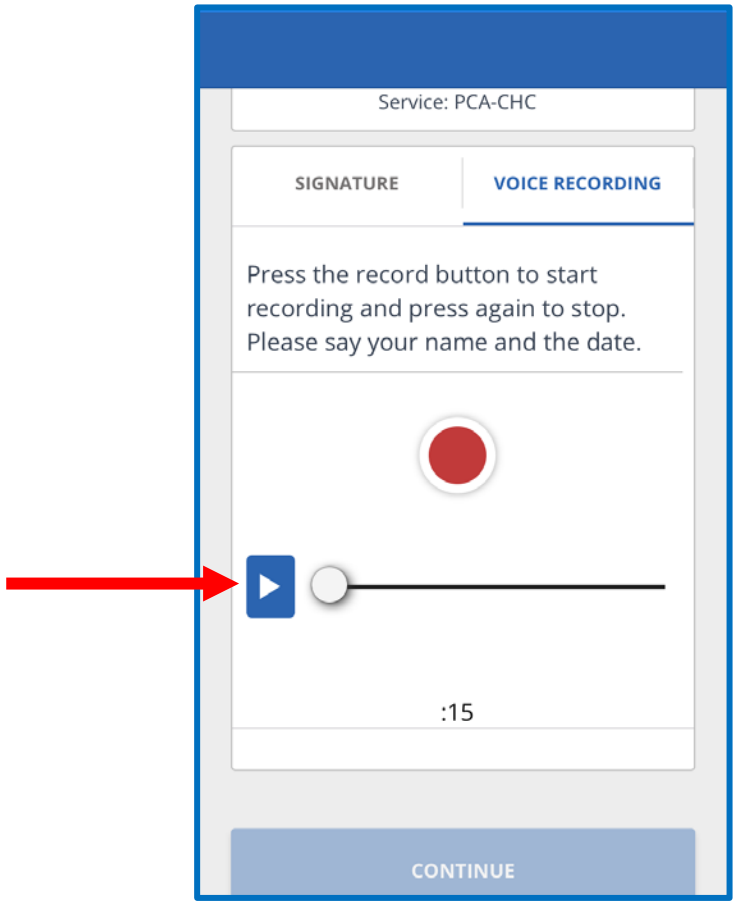
Tap ⊗ to clear the signature field and sign again.

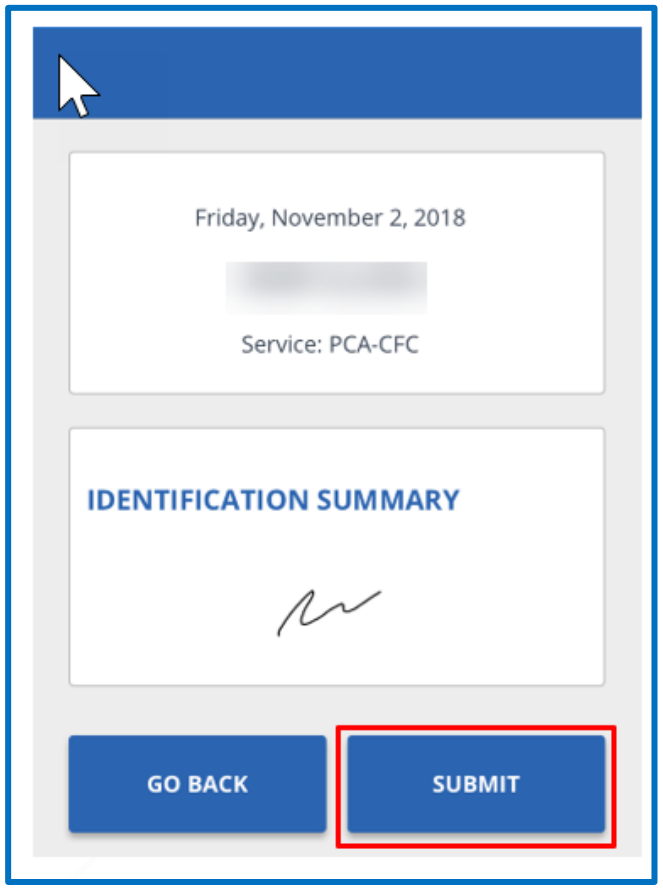
- If the client taps the **VOICE RECORDING**, tap the Record icon.

- Tap the Record icon again to stop the recording.

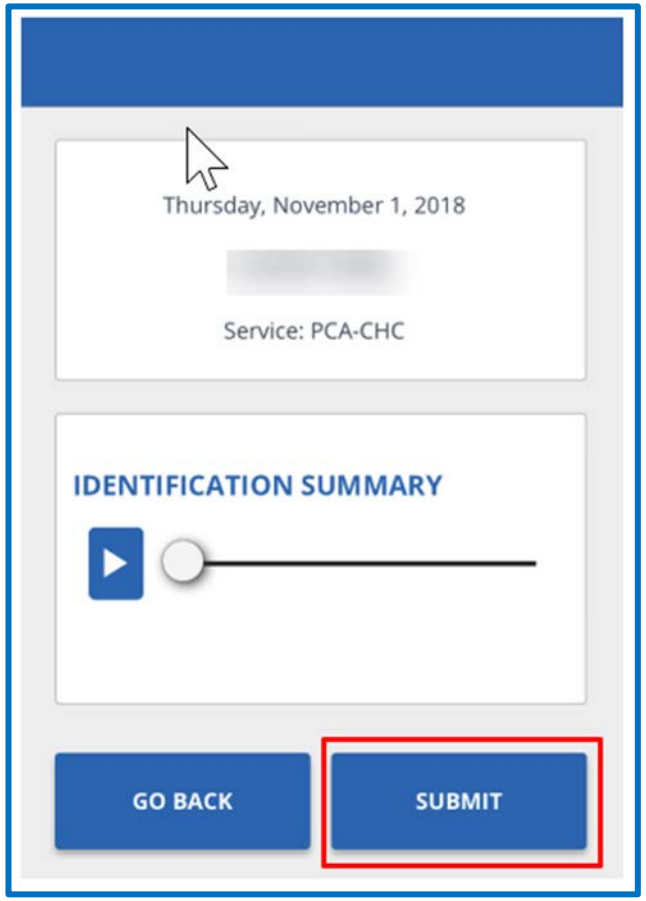


- Voice recordings can be a maximum of 15 seconds.
- Tap the Play icon to play the recorded audio.

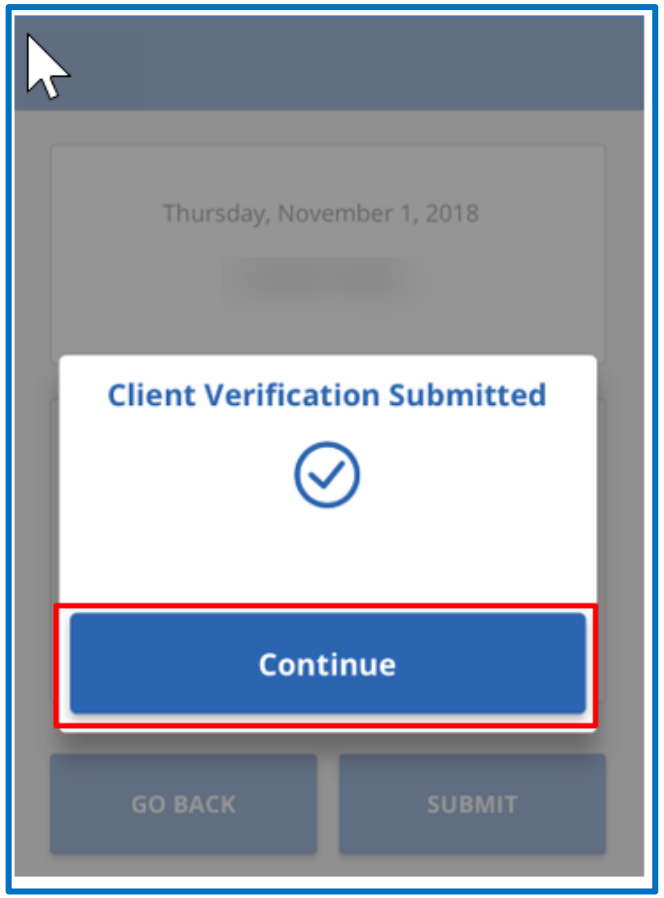




- Tap **SUBMIT** (Signature Confirmation)



- Tap **SUBMIT** (Voice Confirmation)



- Tap **CONTINUE**

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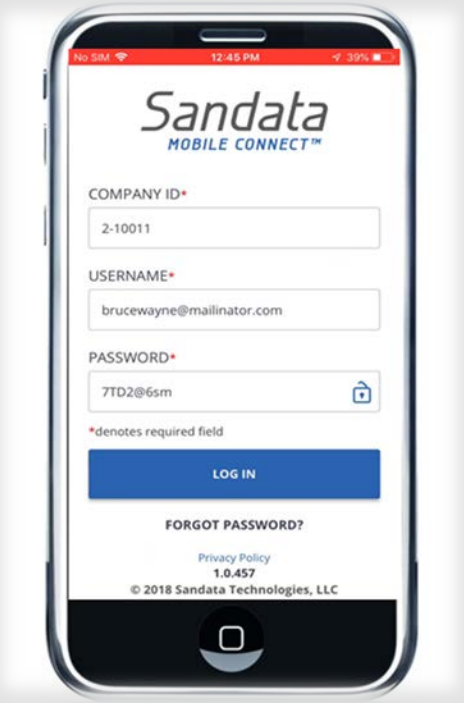
DEMO VIDEO

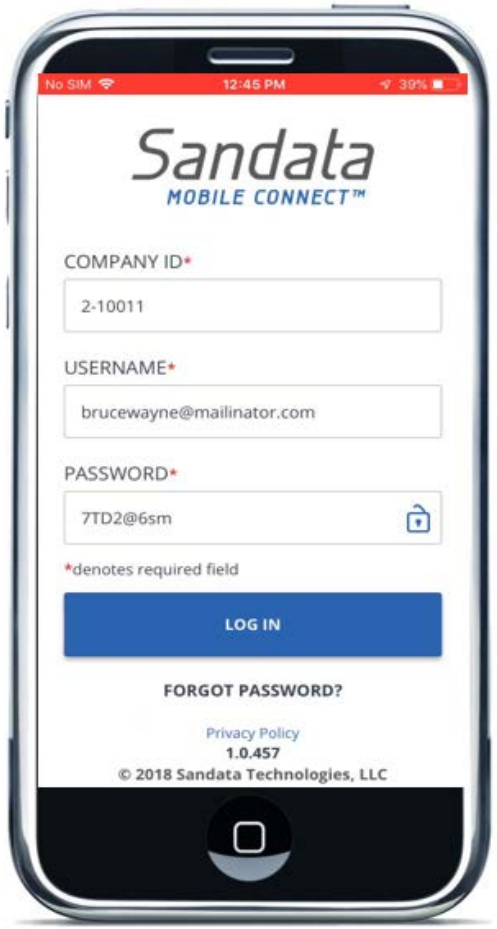
* Client Verification



Questions

- Questions regarding the Sandata EVV system or for updates to mailing addresses, phone number, or email addresses contact:

- **ARIS Solutions** by Phone:
- **(800) 798-1658** - Press #2 for EVV
- Email at **EVV@arissolutions.org**

Thank You

Electronic Visit Verification by Sandata Technologies