



Electronic Visit Verification (EVV) Caregiver Guide - Mobile Application Setup

Fact Sheet - September 2023

Purpose

This guide is for caregivers using the Sandata Mobile Connect Version 2.0 (SMC 2.0) mobile application, used by provider agencies utilizing the State EVV Solution.

Mobile Visit Verification (MVV) allows an employee to begin and end a visit without requiring the use of the Telephonic Visit Verification (TVV). MVV is the primary and preferred method of calling in and out for client visits.

Information: An employee can start a visit using SMC 2.0 and complete the visit using TVV and vice versa, if required. EVV modalities can be interchanged.

Administrative Set Up by the Provider Agency and Credentialing

SMC 2.0 user credentials for employees are generated when the employee is created as an Employee in Sandata EVV.

When an agency provider creates an employee, the following information must be specified in the employee profile in order for SMC 2.0 to create login credentials.

- First and Last name
- Valid email address
- Social Security Number
- Check the **MVV User** checkbox in the *Employment* section

When these values are captured and the employee record is saved, Sandata EVV generates a temporary SMC 2.0 password and emails it to the employee at the email address entered.

Downloading SMC 2.0 - Transition Guide for Reference

Download Sandata Mobile Connect 2.0 (SMC 2.0) from the Google Play store or Apple's App store, depending on the user's mobile 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.



First Time Log-In

First time log-in: Users not using an email address to log-in must use the login credentials provided by the agency.

Sandata Electronic Visit Verification users: Use the email address from your employee profile or the employee’s Santrax ID, depending on configuration.

First time log-in using an email address: Users logging 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 2.0 from the Google Play store or the Apple App store.

Note(s):

- Check the spam folder if the password email doesn’t appear in the email account’s inbox.
- Admin unlock: If you try to log in too many times without success, your account will be locked. You must call your agency’s administrator to unlock your account.
- In-app unlock: If you try to log in too many times without success, your account will be locked. When the in-app unlock feature is turned on, it will automatically take you to the reset password screen after your account is locked.

Logging into SMC 2.0

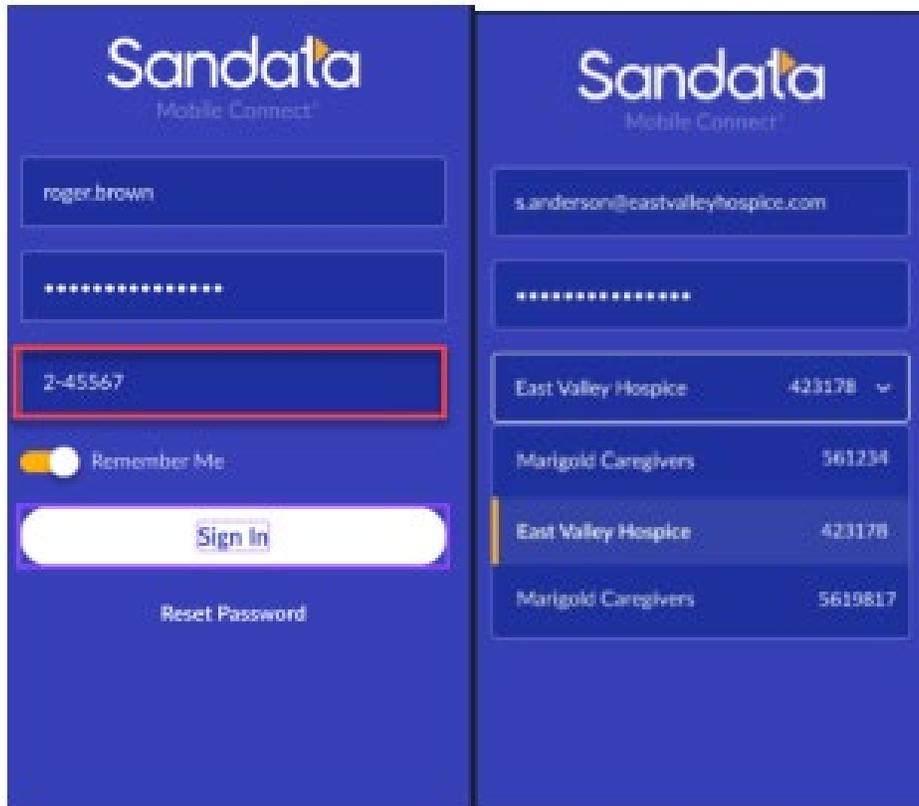


1. Tap the Sandata Mobile Connect 2.0 icon to launch the application.
2. Enter log-in credentials:
 - A. **Username** - Username credentials will change based on agency configuration.
 - i. The employee’s Santrax ID.
 - ii. The employee’s Username.
 - iii. The email address from the employee’s profile.
 - B. **Password** - Password credentials will 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 **Sign In**



4. Enter or select your agency from the drop-down, if applicable.
If you only work for one agency tapping **Sign In** will log you in without this information.
5. Tap **Sign In**.



Security Setup (Initial Log-In)

For initial log-in, if you log in with a username that is not an email address you must set up a series of security questions. Users must keep the answers to these questions, as they are required to complete the reset password process.

Note: The number of security questions is based on the agency/payer configuration. Each security question must have a unique answer.

1. Select and answer the security questions.
2. Tap **Continue**.
3. Enter the temporary Password.
4. Enter and re-enter a new password.

The image displays two screenshots from a mobile application setup process.

The left screenshot is titled "Security Questions". It contains the instruction: "Please create security questions for your account. We will ask for these when you need to reset your password." Below this, there are two sections for questions. "Question 1" has a dropdown menu labeled "Select a question" and an "Answer" text input field. "Question 2" also has a dropdown menu labeled "Select a question" and an "Answer" text input field. At the bottom of the screen is a grey "Continue" button.

The right screenshot is titled "Change Password" and has a close button (X) in the top right corner. It features three password input fields: "Current password", "New password", and "Confirm new password", each with an eye icon for visibility control. Below the fields is a "Requirements" section with five checked items: "12 or more characters", "Uppercase letter", "Lowercase letter", "Number", and "Special character". At the bottom, a grey "Continue" button is highlighted with a red rectangular border.

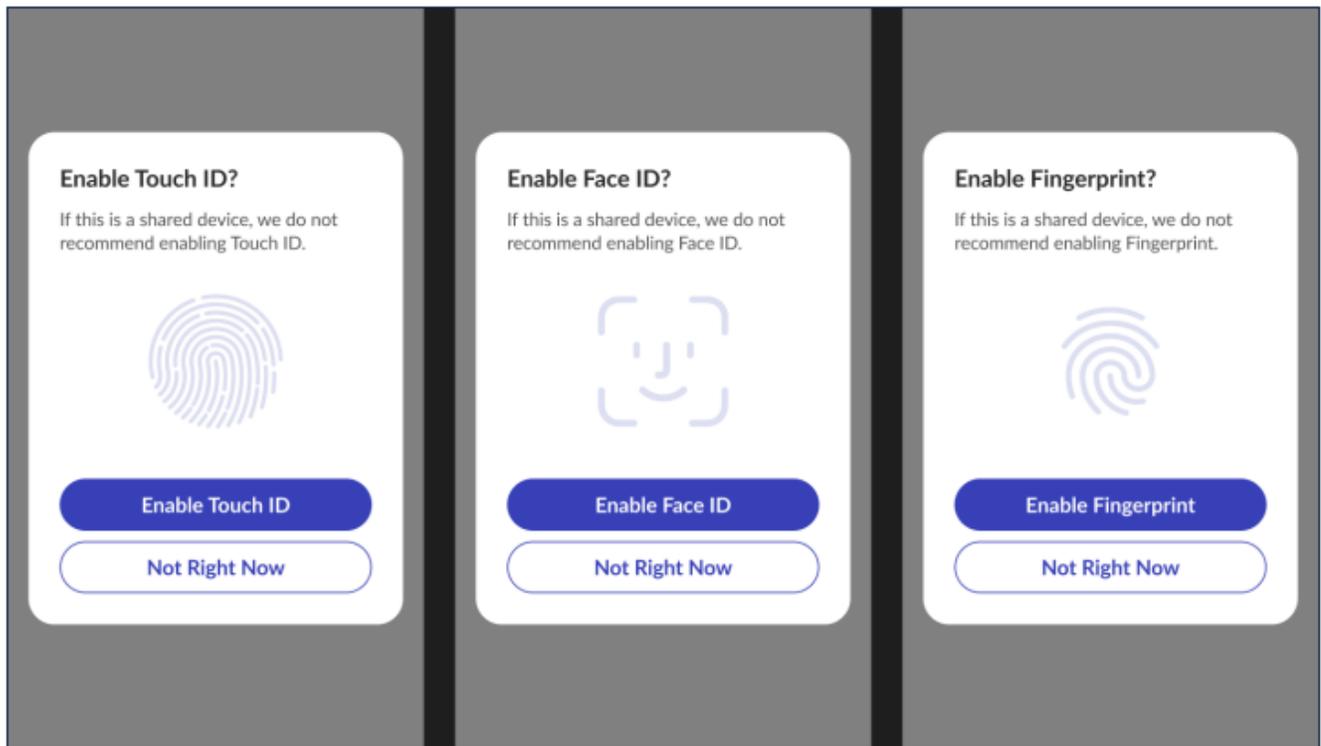
Note: To keep your account safe, you need to change your password regularly, usually every 60 days. When it's time to change your password, messages will start to appear 10 days before the expiration date to let you know how many days you have left. If you do not change your password before it expires, you must follow the steps to reset it.

Face or Fingerprint/Touch Log In

To log in using your face or fingerprint, you need to first set it up on your phone. If this step is not offered during your first log in can be enabled later from the System Setting screen. Depending on the kind of phone you have, you can log in by scanning your face (only on iPhones) or by scanning your fingerprint (on iPhones or Android phones).

1. Tap Enable Touch ID, Enable Face ID, or Enable Fingerprint.

If you tap **Not Right Now** touch and face ID can be enabled later from the System Setting screen.

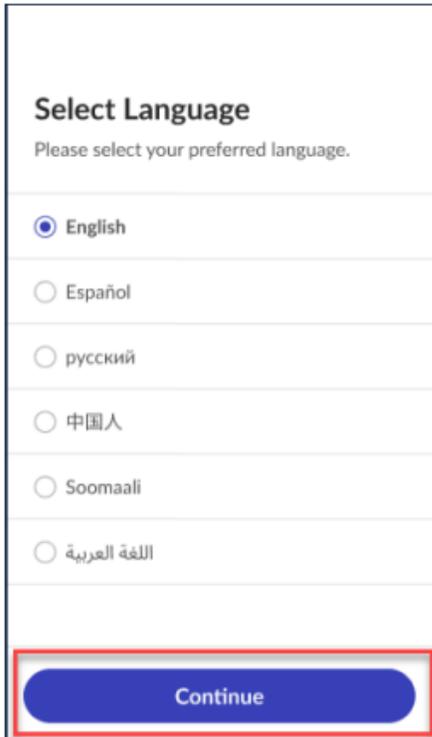


Confirm Language Preference

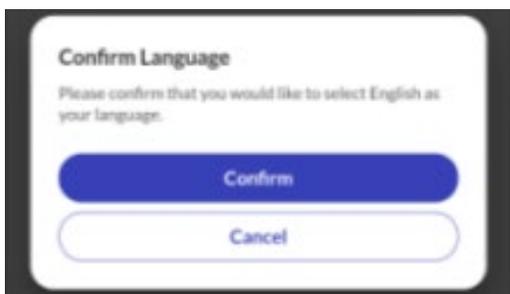
SMC 2.0 is available in multiple languages. Users can select which language they want the text in the app to be shown in. Languages available for the program include:

- English
- Spanish
- Russian
- Mandarin Chinese
- Somali
- Egyptian Arabic

1. Navigate to Settings.
2. Tap Language.
3. Tap your preferred language.
4. Tap **Continue**.



5. Tap **Confirm** to save your preferred language.



After confirming the language preference on the device, the *Home* screen displays.

Information: The preferred language must be selected the first time the employee logs in to a new device.

Direct questions to your Provider Agency or the Sandata Help Desk

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