



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

Fact Sheet - September 2023

Purpose

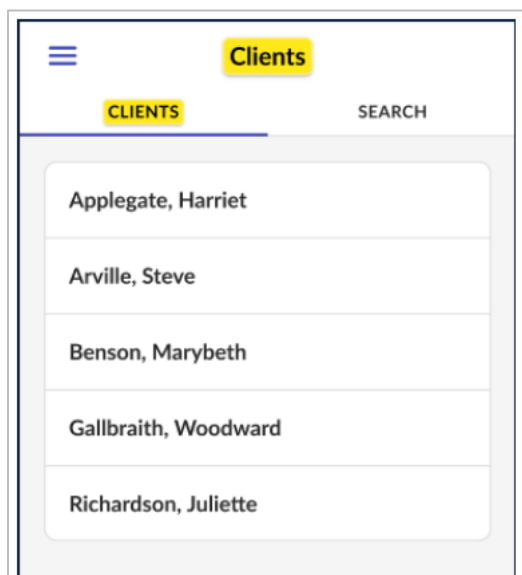
This guide is for caregivers using the Sandata Mobile Connect Version 2.0 (SMC 2.0) mobile application to record a visit with the Mobile Visit Verification (MVV) methodology. SMC 2.0 is used by provider agencies utilizing the State EVV Solution. Caregivers should make sure that they are using the correct SMC application with a blue logo (as shown in the inset image in this paragraph). Caregivers must work with their provider agencies to assure they are active in the EVV system and able to log in and record visits.

MVV allows a caregiver to record a visit by clocking in and out at the time of service. MVV is the primary and preferred method of recording visits.

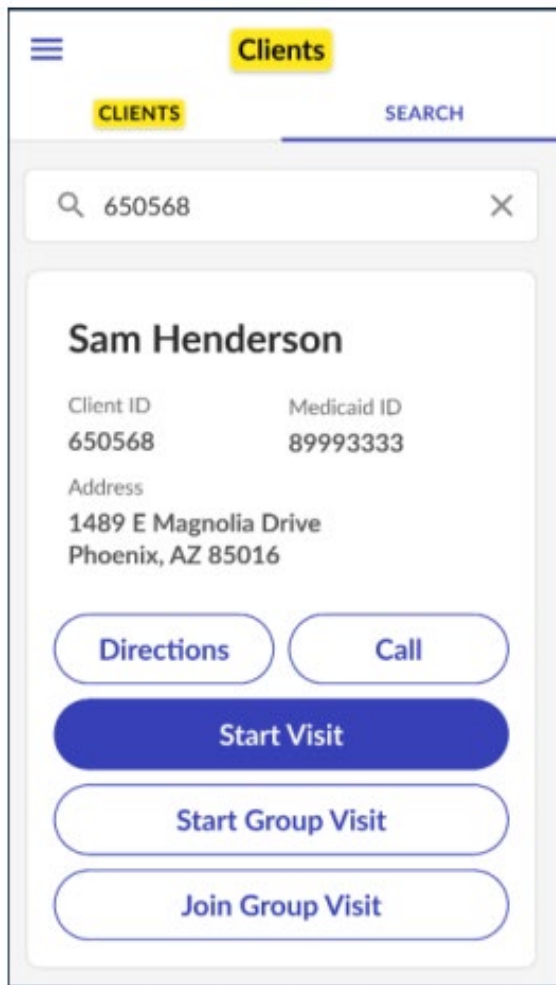
Starting a Visit (Clients Tab)

When the caregiver arrives to provide care to the client, they will log in to the SMC 2.0 app, then:

1. Go to the **Clients** tab on the Clients screen.
2. Tap a client from the list.



3. Tap Start Visit.



Clients

CLIENTS **SEARCH**

Q 650568 X

Sam Henderson

Client ID 650568 Medicaid ID 89993333

Address
1489 E Magnolia Drive
Phoenix, AZ 85016

Directions **Call**

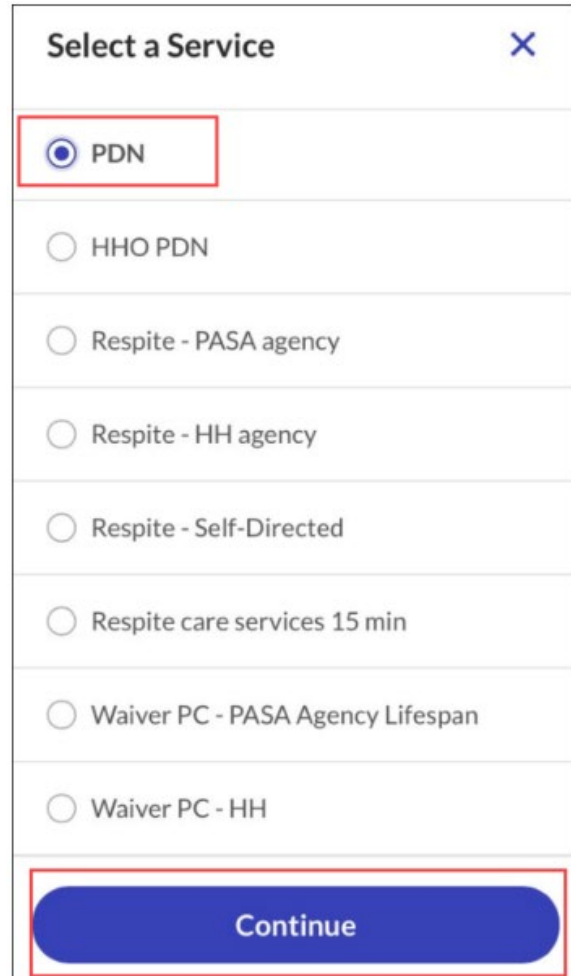
Start Visit

Start Group Visit

Join Group Visit

4. Select a Service.

5. Tap Continue.



Select a Service X

☒ PDN

☐ HHO PDN

☐ Respite - PASA agency

☐ Respite - HH agency

☐ Respite - Self-Directed

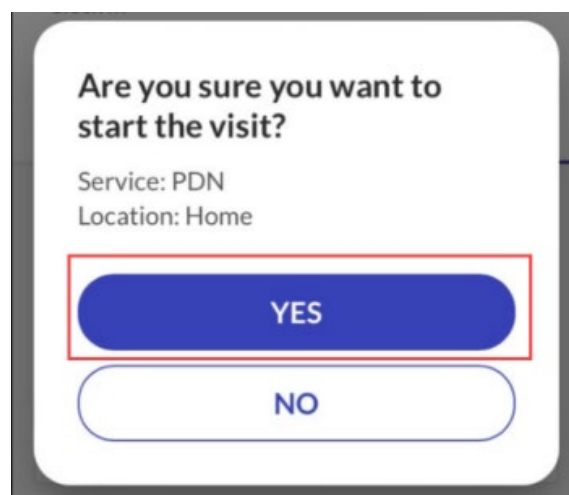
☐ Respite care services 15 min

☐ Waiver PC - PASA Agency Lifespan

☐ Waiver PC - HH

Continue

6. Tap Yes to start the visit.



Are you sure you want to start the visit?

Service: PDN
Location: Home

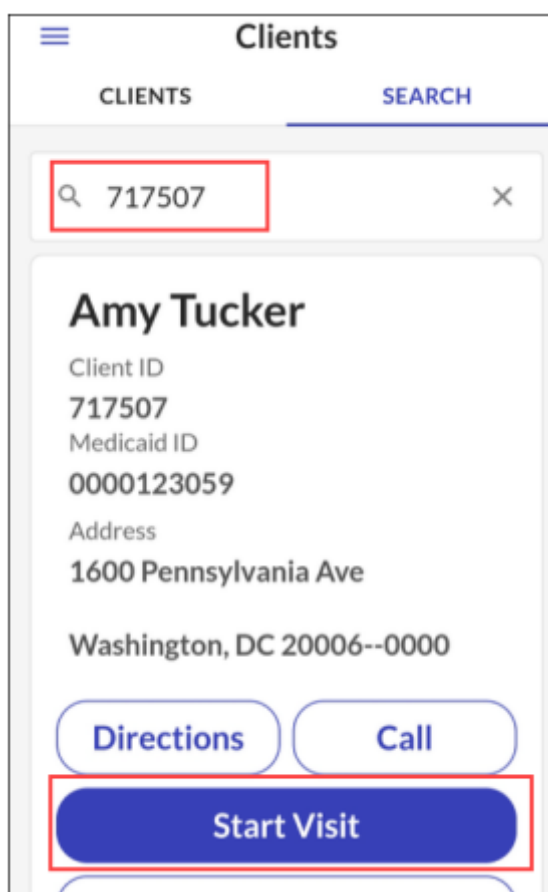
YES

NO

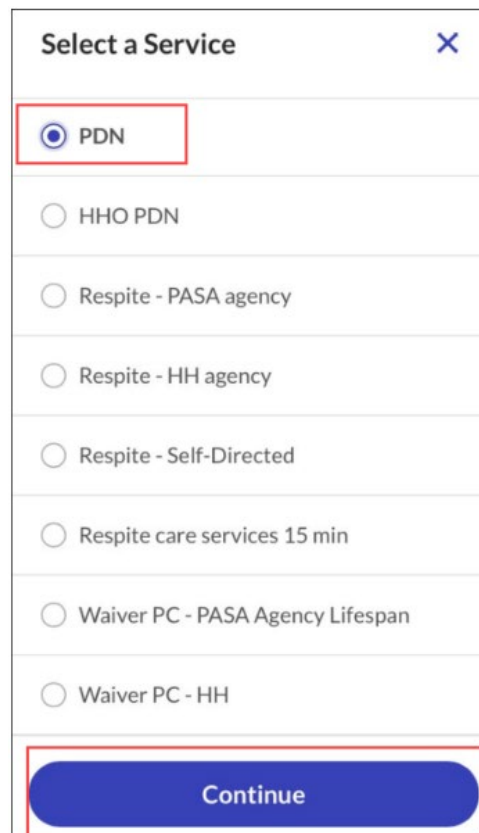
Starting a Visit from the Search Client Tab (Known Client)

When the caregiver arrives to provide care to the client, they will log in to the SMC 2.0 app, then:

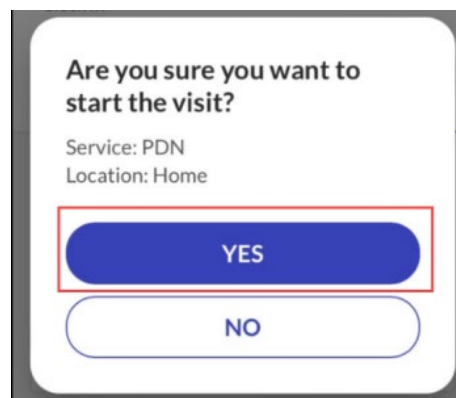
1. Go to the **Search** tab on the Clients screen.
2. Tap the Enter Client Identifier field, enter search criteria. Client identifiers include Medicaid ID, Client ID, or Customer Number.
3. Tap **Start Visit**.



4. Select a Service.
5. Tap **Continue**.



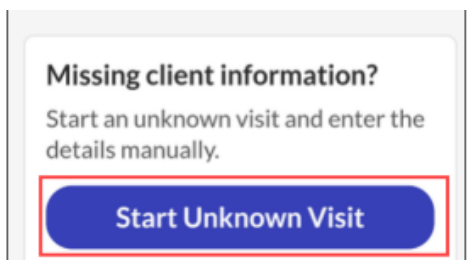
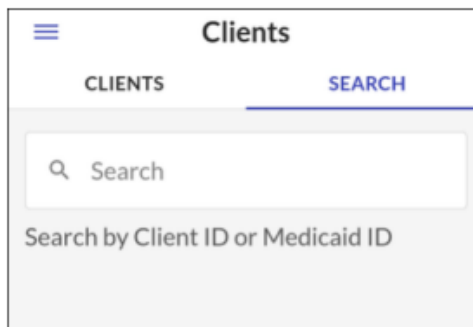
6. Tap **Yes** to start the visit.



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

When the caregiver arrives to provide care to the client, they will log in to the SMC 2.0 app, then:

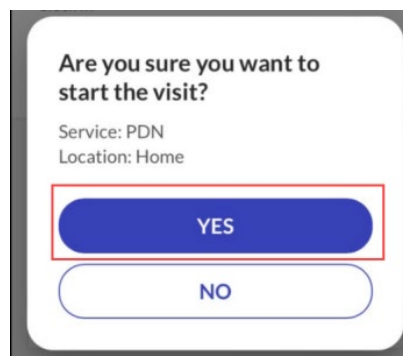
1. Go to the **Search** tab on the Clients screen.
2. Tap **Start Unknown Visit**.



3. Complete the required fields.
4. Tap **Start Visit**.
Tapping Start Visit starts a standard visit with an unknown client. Tap Start Group Visit to start a group visit with an unknown client or enter a group visit number and 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.

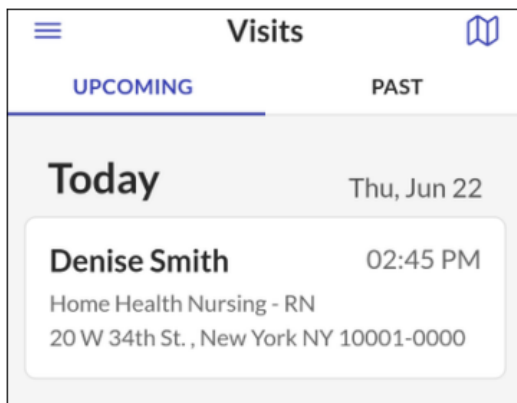
The screenshot shows the 'Start Unknown Visit' form. At the top is the title 'Start Unknown Visit' with a close button (X). Below the title is the instruction 'Please enter the client's name to continue.' There are four input fields: 'First Name', 'Last Name', 'Medicaid ID (optional)', and 'Client ID (optional)'. Below the input fields are three buttons: 'Start Visit', 'Start Group Visit', and 'Join Group Visit'. The 'Start Visit' button is highlighted with a red border.

5. Select a Service.
6. Tap **Continue**.
7. Tap **Yes** to start the visit.

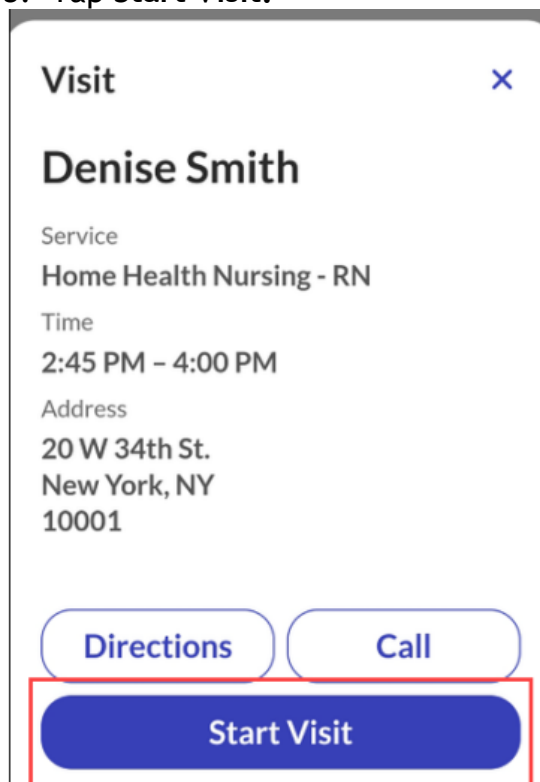


Starting a Visit (Scheduled)

1. Go to the **Upcoming** tab on the Visits screen.
2. Tap a visit from the list of available visits on the Upcoming Tab.
4. Select a Service.
5. Tap **Continue**.
6. Tap **Yes** to start the visit.

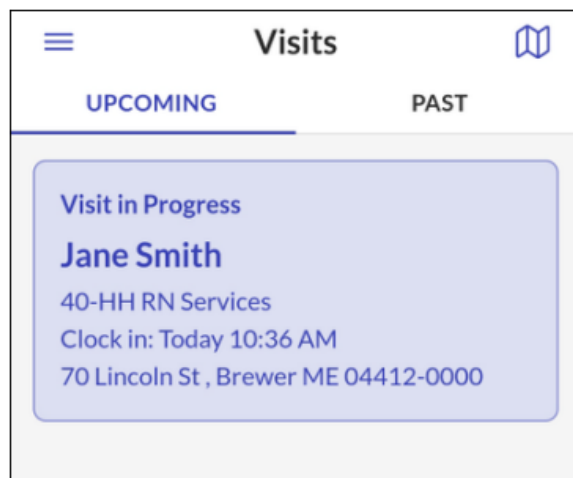


3. Tap **Start Visit**.



Completing a Visit

1. Log in to MVV. Got to the **Upcoming** tab on the Visits screen.
2. Tap on the Visit in progress.



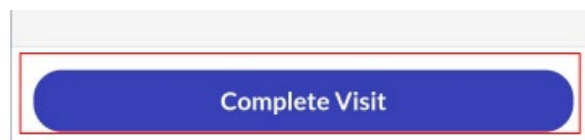
3. Complete any additional visit functionality.

Visit Notes

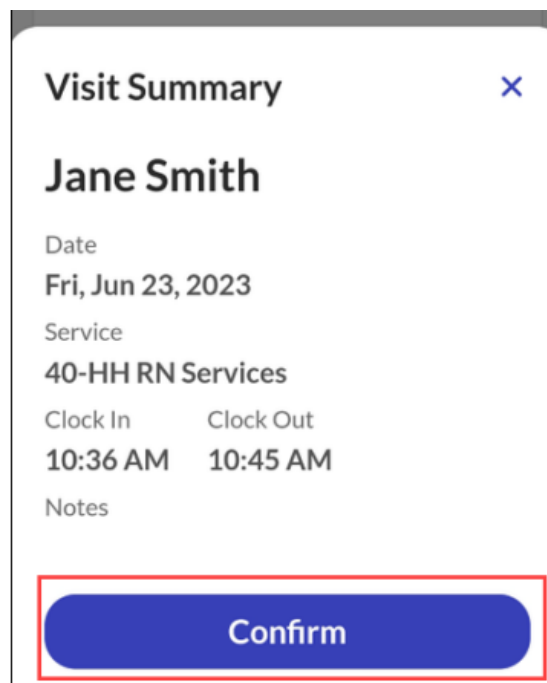
Please be aware that notes will never be required; any text in this field is not recorded nor transmitted with the EVV record. This Visit Note field should not be used to satisfy documentation requirements. This Visit Note field

should not be used to capture any clinical data.

4. Tap Complete Visit.



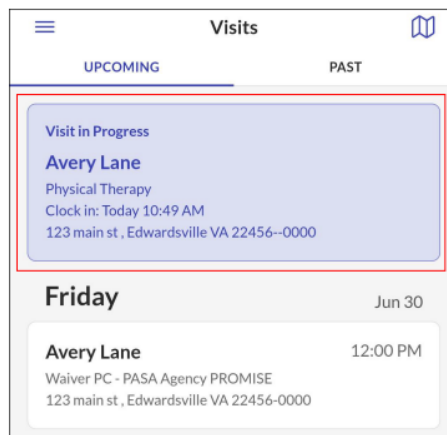
5. Tap Confirm.



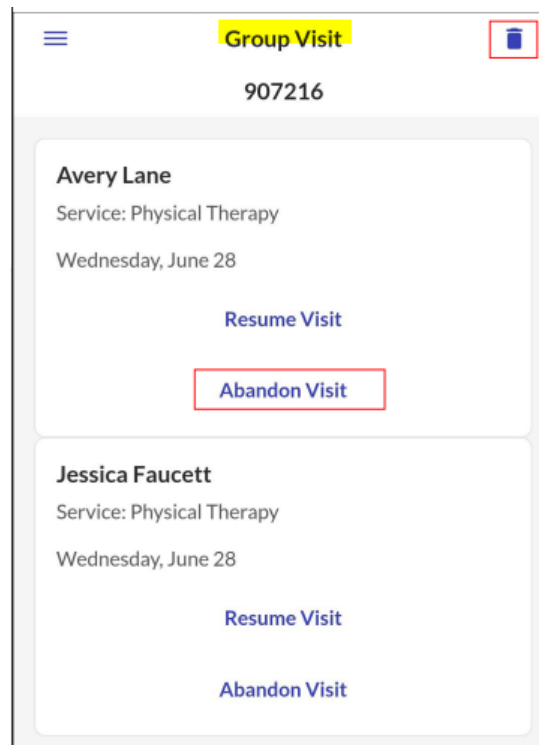
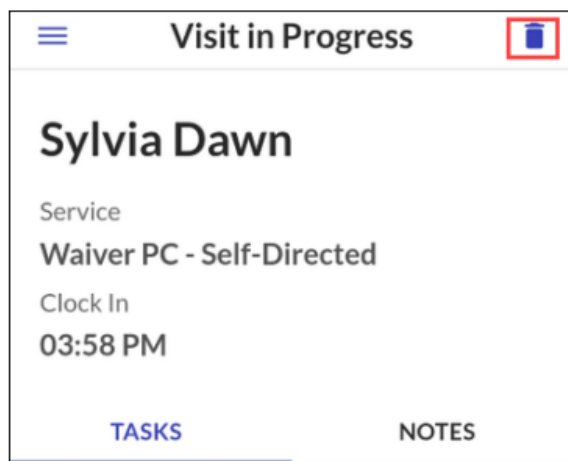
Abandoning a Visit

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.

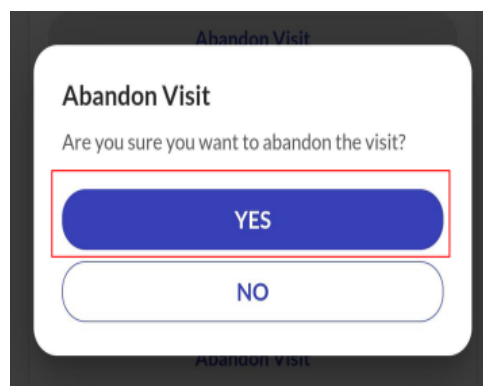
1. Click the Visit in Progress on the **Upcoming** tab.



2. Tap the **Trash Can** in the top right corner. For Group Visits: Tap the **Trash Can** in the top right to end all in progress visits or tap Abandon Visit under the client's name, to abandon the group visit for a single client.

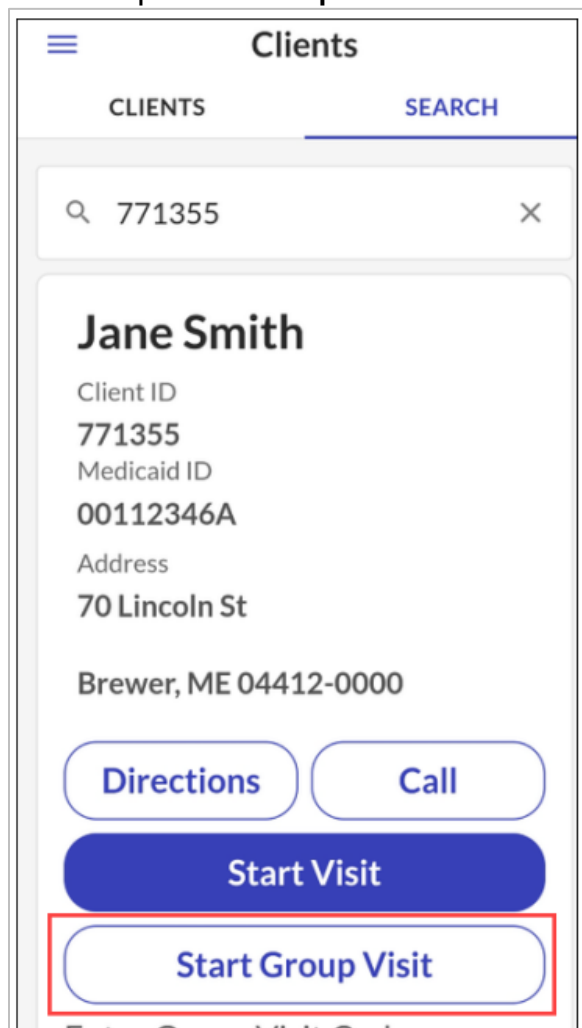


3. Tap Yes.



Starting a Group Visit

1. Search for a client.
2. Tap **Start Group Visit**.



Clients

CLIENTS SEARCH

771355

Jane Smith

Client ID
771355

Medicaid ID
00112346A

Address
70 Lincoln St

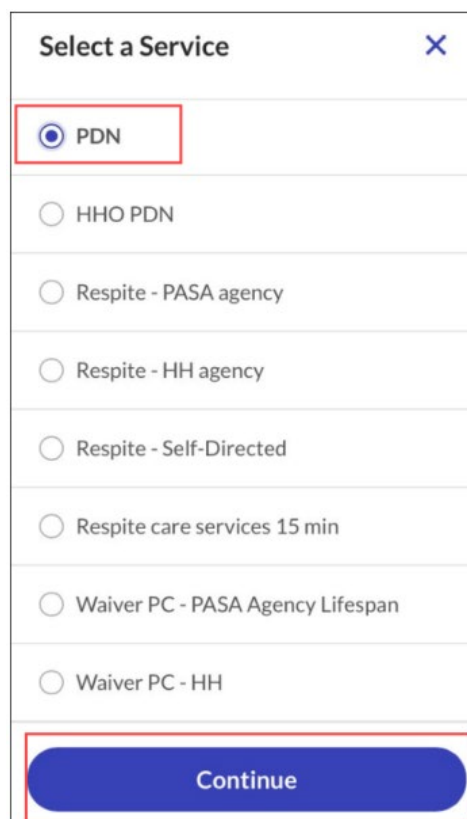
Brewer, ME 04412-0000

Directions Call

Start Visit

Start Group Visit

3. Select a service.
4. Tap **Continue**.



Select a Service

☒ PDN

☐ HHO PDN

☐ Respite - PASA agency

☐ Respite - HH agency

☐ Respite - Self-Directed

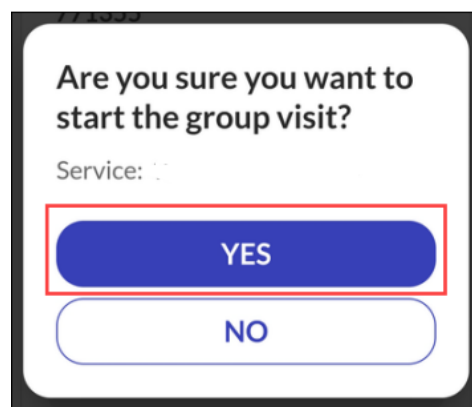
☐ Respite care services 15 min

☐ Waiver PC - PASA Agency Lifespan

☐ Waiver PC - HH

Continue

5. Tap **Yes** to start the group visit.



Are you sure you want to start the group visit?

Service: PDN

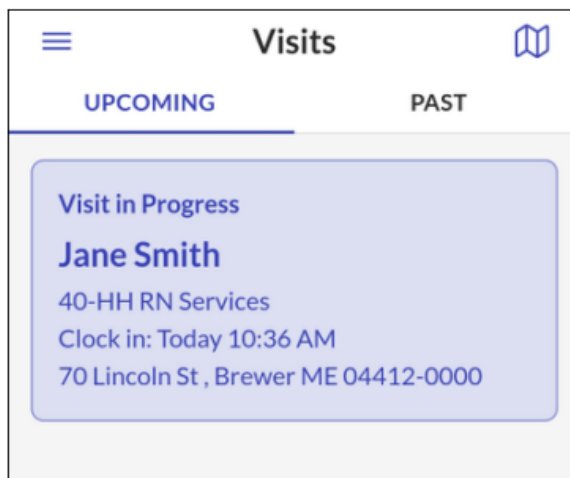
YES

NO

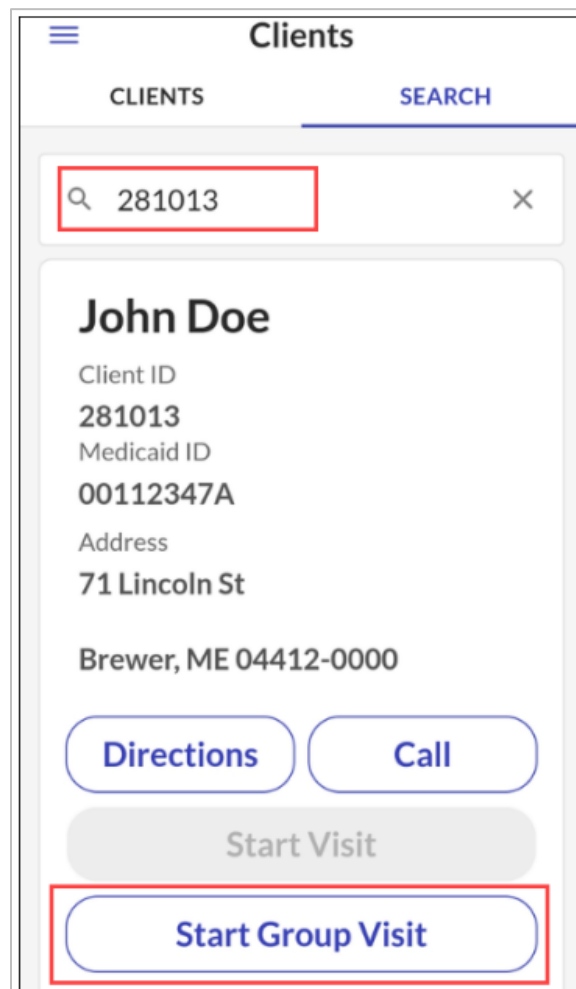
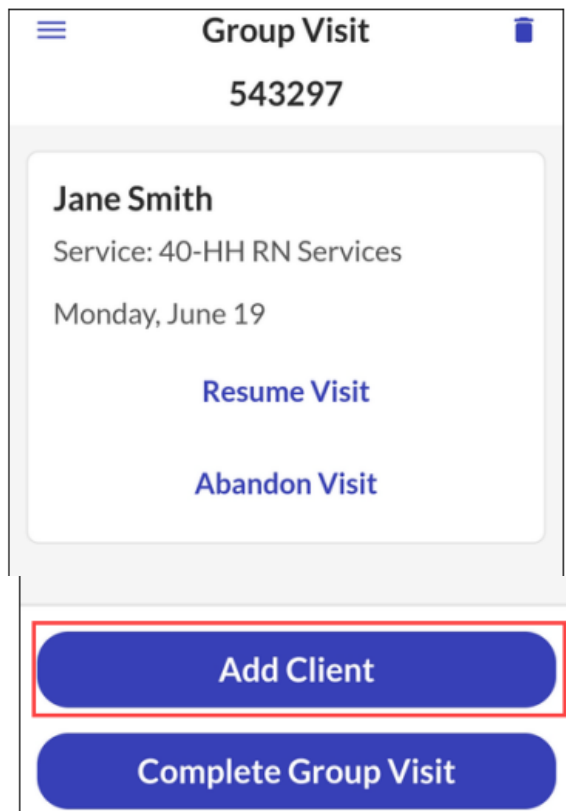
Adding Client to a Group Visit

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

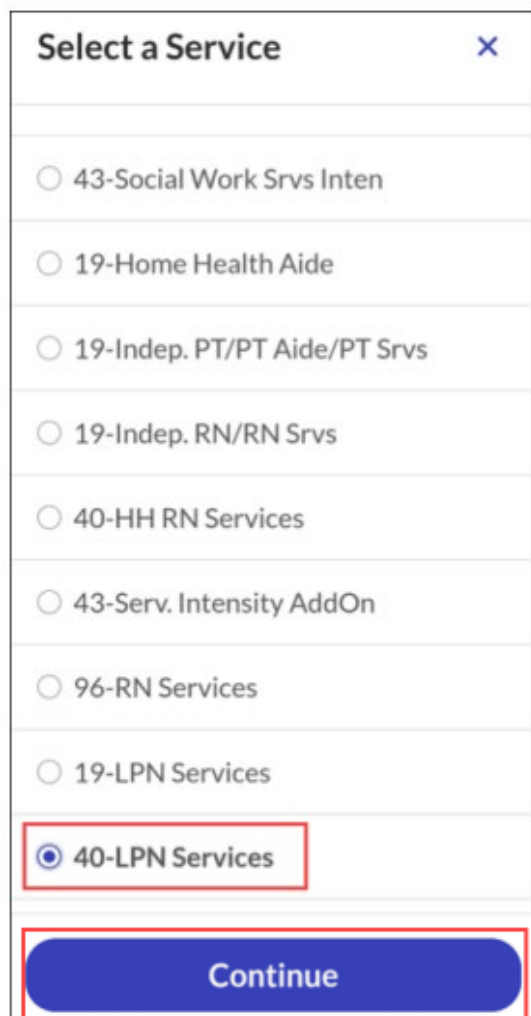
1. Go to the **Upcoming** tab on the Visits screen.
2. Tap on the Visit in progress.
4. Search for a client or start an unknown visit.
5. Click **Start Group Visit**.



3. Tap **Add Client**.



6. Select a Service.
7. Tap **Continue**.

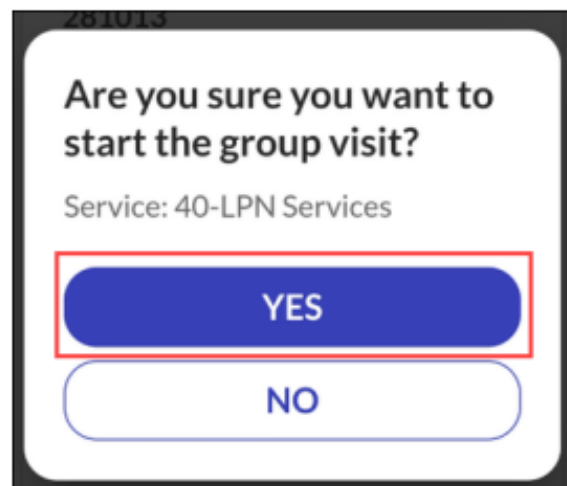


Select a Service ✕

- ☐ 43-Social Work Srvs Inten
- ☐ 19-Home Health Aide
- ☐ 19-Indep. PT/PT Aide/PT Srvs
- ☐ 19-Indep. RN/RN Srvs
- ☐ 40-HH RN Services
- ☐ 43-Serv. Intensity AddOn
- ☐ 96-RN Services
- ☐ 19-LPN Services
- ☒ 40-LPN Services

Continue

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



281013

Are you sure you want to start the group visit?

Service: 40-LPN Services

YES

NO

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.

1. Search for a client or start an unknown visit.
2. Enter a Group Visit code.
3. Tap Join Group Visit.
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

CLIENTS SEARCH

Q 0000123065 X

Barry Valentin

Client ID
834620

Medicaid ID
0000123065

Address
200 Washington Ave

ST Louis, MO 63102--0000

Directions Call

Start Visit

Start Group Visit

Enter Group Visit Code

128142

Join Group Visit

4. Select a Service.

5. Tap Continue.

Select a Service X

☐ DEFH Occupational Therapy

☐ Speech Therapy

☐ ACDE Speech Therapy

☐ HHO Speech Therapy

☐ DEFH Speech Therapy

☒ **Home Health Aide**

Continue

6. Tap Yes to start the visit.

Are you sure you want to start the group visit?

Service: Home Health Aide

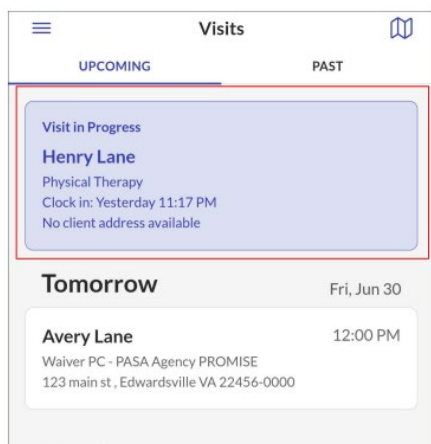
YES

NO

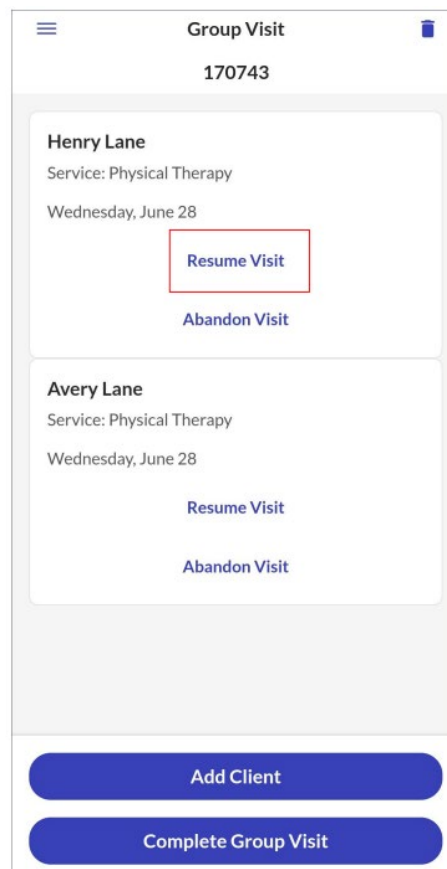
Completing a Group Visit (Single Client)

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

1. Got to the Upcoming tab on the Visits screen.
2. Tap on the Visit in Progress.

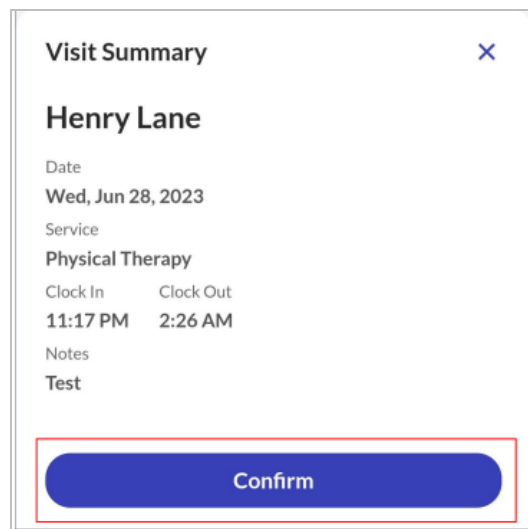


3. Tap Resume Visit.



4. Tap Complete Visit.

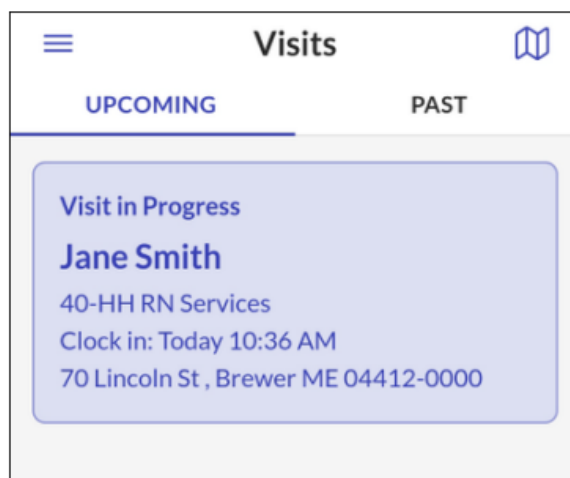
5. Tap Confirm.



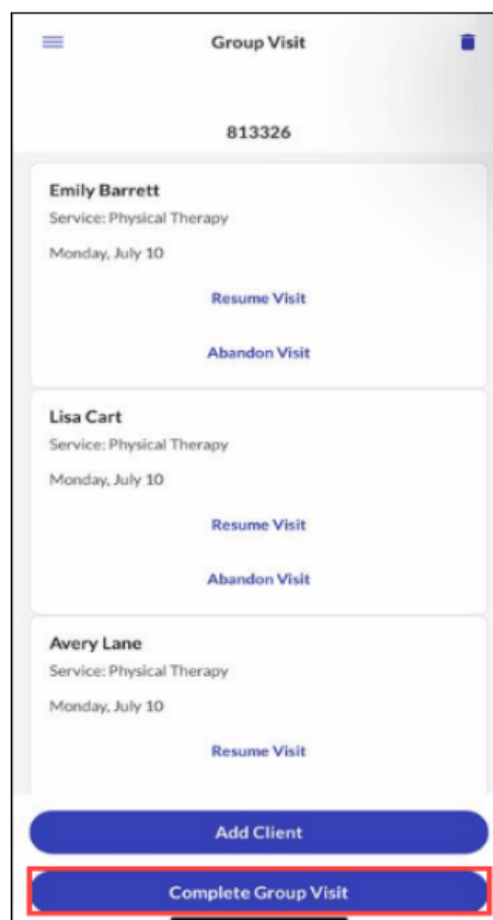
Completing a Group Visit (All Clients)

You can complete a group visit for all client in the group at once, but the group visit will remain active until all employees have completed all visits for clients in the group.

1. Go to the **Upcoming** tab on the Visits screen.
2. Tap on the Visit in Progress.

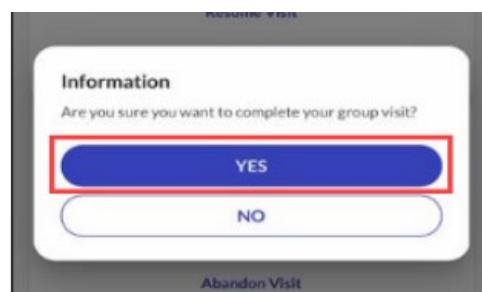


3. Tap **Complete Group Visit**.



4. Tap **Yes**.

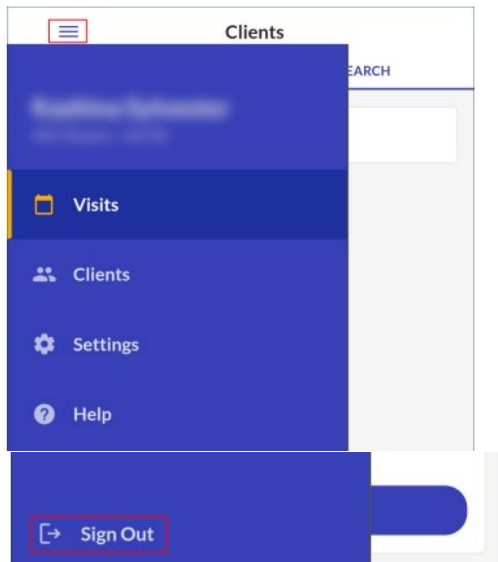
The group visit is completed.



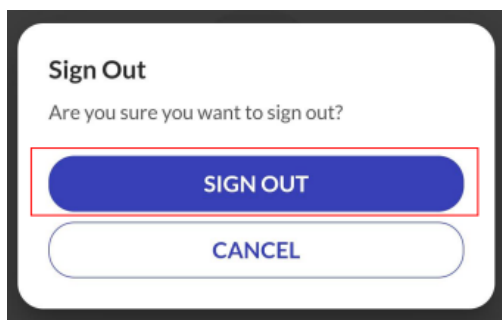
Sign Out of Sandata Mobile Connect

Note: If you leave the app for any reason, such as taking a phone call, the app will automatically log you out.

1. Tap Sign Out on the navigation menu.



2. Tap Sign Out to log out of the application.



Direct questions to your Provider Agency or the Sandata Help Desk

Phone: (855) 871-8780

Email: cocustomer@sandata.com