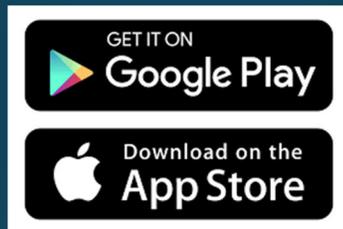Sandata Mobile Connect
Electronic Visit Verification

Respite providers and inclusion facilitators through UCP punch in and out from their personal smart phone, tablet, or iPad each time a shift is worked through an app called Sandata Mobile Connect.

The mobile app uses Electronic Visit Verification (EVV) which is a federal requirement for certain billing codes. EVV is designed to electronically record the date, time, GPS location and service provided at the beginning and end of each shift worked. EVV does not track your location throughout your shift or when the app is not in use. It only captures your location at punch in and at punch out.

The following pages contain step by step instructions on how to use the app, how to record work hours, and shares important payroll information.

Because everyone's skills and comfort level with electronics and technology is different, please do not hesitate to reach out at any time and with any questions. We are more than happy to offer guidance as often as needed.

To download Sandata Mobile Connect®, you can find it in either the Google Play Store or Apple's App Store, depending on your mobile device. Simply tap on the application store icon on your device, and then search for "Sandata Mobile Connect." Once you find it (see logo above), you can download the application.

If you are unfamiliar with downloading apps to your phone, you can use the links below for Google and Apple's official instructions on how to download and install applications for Android and iOS devices.

• Android Users: [Google Play Store](#)

• iOS Users: [Apple App Store](#)

Please note:

1. The first time you tap on Sandata Mobile Connect, a pop-up display will ask "Allow Sandata Mobile Connect to access your location?" Sandata Mobile Connect requires location for visit verification. Tap **Allow While Using App.**

2. Another message will display asking "Sandata Mobile Connect Would Like to Use Bluetooth. Sandata Mobile Connect requires Bluetooth for security purposes". Tap **OK.**

Logging into SMC

1. Tap the Sandata Mobile Connect icon to launch the application.


2. Enter your username and password.
   - Your username is your email address. You will receive a temporary password sent to your email address to log in for the first time. This email also includes links to download SMC from the Google Play store or the Apple App store. Once you have logged in, you will be able to change the password to one of your choice.

     NOTE: Check the spam folder if the password email does not appear in your email inbox.

3. Tap **Sign In**.
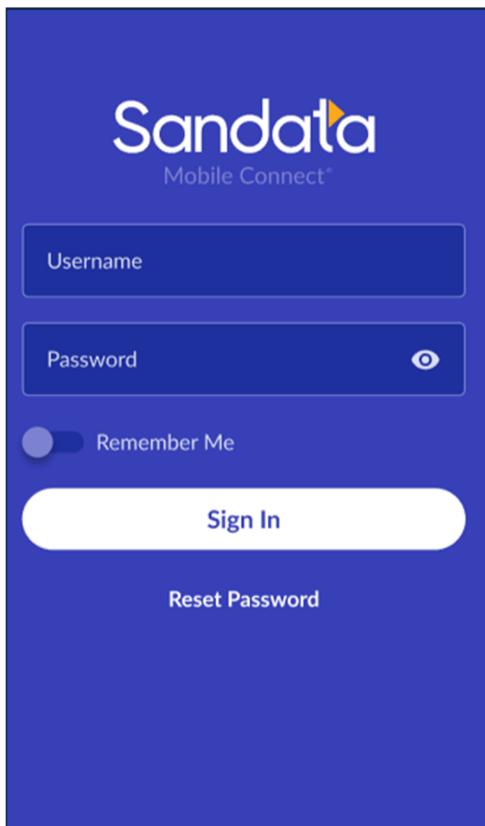
4. Enter or select your agency. If you work for more than one agency, select the agency from the drop-down menu. (UCP's agency number is 3-8028)

5. Tap **Sign In**.

Face or Fingerprint Log In

Users can now access SMC using face or fingerprint identification stored on their mobile device. Apple users can log-in using Face ID. Android users can log-in use their device's fingerprint scanner.

Once you have logged in for the first time using your password, you can then enable face or fingerprint log-in on the Settings screen.

When logging in using face or fingerprint, the normal password rules are still followed for password reset and expiration. When a user's password is no longer valid and they log-in using their face or fingerprint, then they are immediately prompted to reset their password. Face or fingerprint log-in can be disabled on the Settings screen.

Tap **Settings** on the Navigation Menu.
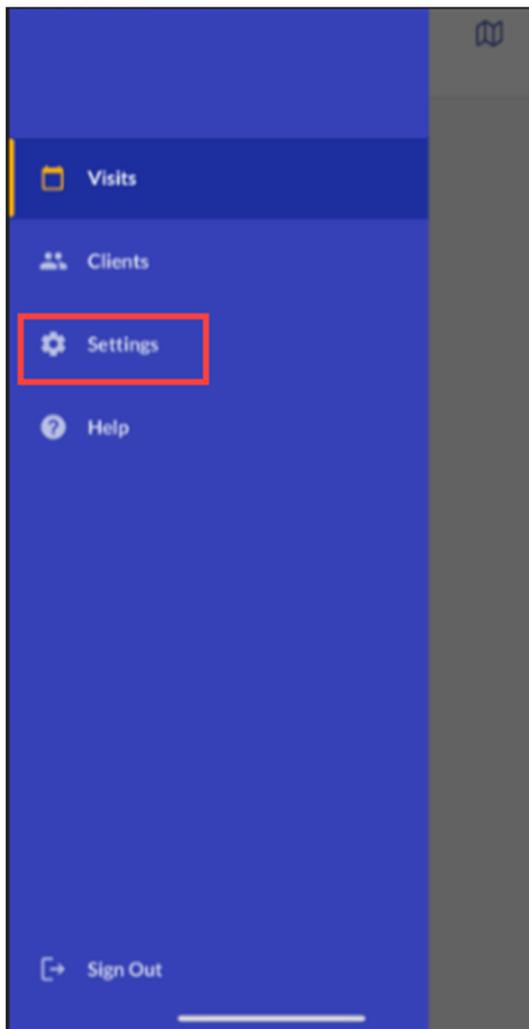
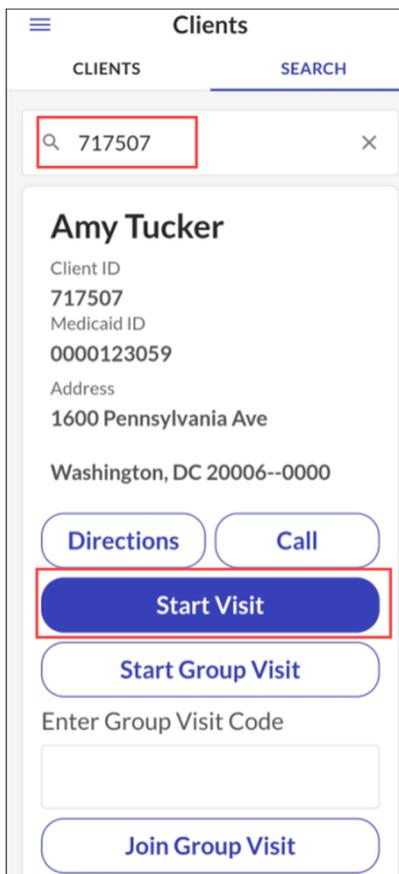Tap **Touch ID/Face ID** on the device.
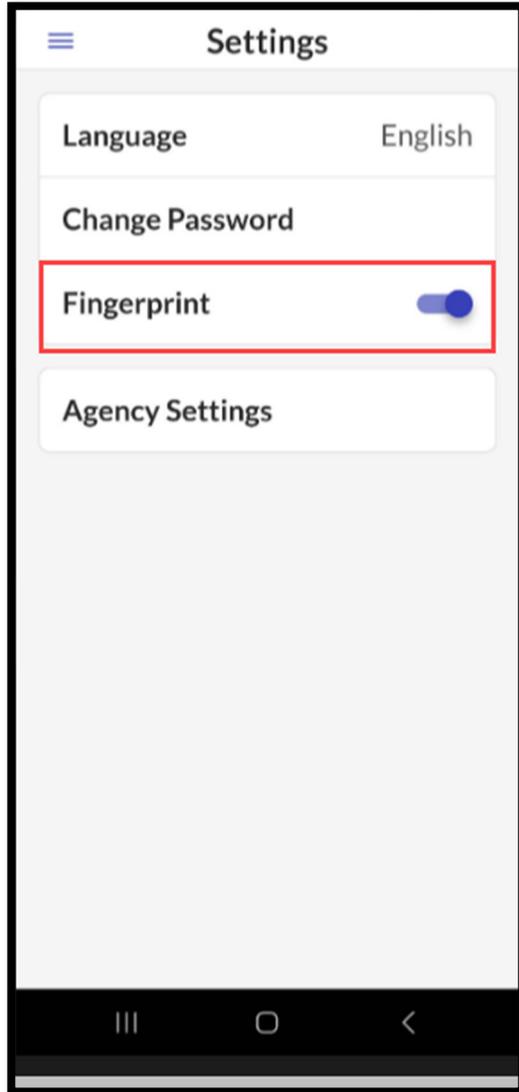
Starting a Visit

1. Enter the Client Identifier Number and tap **SEARCH.**

   Client Identifier Numbers will be provided to you when you are matched with a new client and can be found on updated Respite Care Plans or on the Youth Resources Profile for future reference.

2. The client's information will display on the screen.

3. Tap **START VISIT.**

Note: If you are providing care for multiple clients at the same time, please select the first client (A) you pick up or whomever arrives first. If both clients (A and B) start under your care at the same time, select either client but you can only select one. You will document the additional client(s) later.

If client A is dropped off or picked up before care with client B ends, you should punch out and then start a new shift for Client B (only). See Completing a Visit for more information.

4. Select a Service.

5. Tap **CONTINUE**.

Which service should you select?

- Many clients will only have one option to select.

- If your client has multiple services to choose from select carefully.

    When working as an Inclusion Facilitator in a child care program, or with a teen during the school year after school, you should select "Personal Support".

    When working as an Inclusion Facilitator with the teen summer program, you should select "Camp Odyssey".

    When working as a Respite Provider with just one client, you should select "Respite". If you are working with two respite clients at the same time, you would select "Paired Respite". When working with three respite clients, you would select "Shared Respite".

    Some employees may work with the same client in multiple roles. Your shifts in Sandata should reflect the service you are providing at the time. If you are unsure, please reach out to your Service Coordinator for clarification.
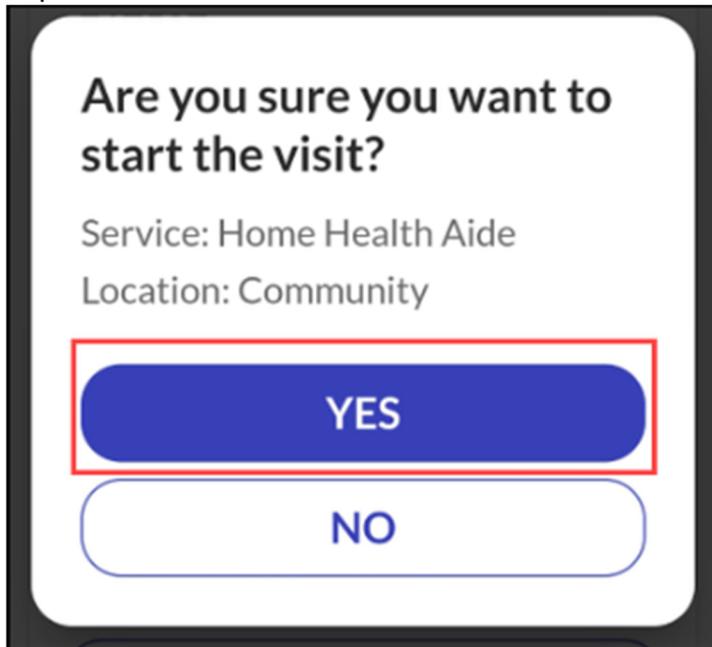
6. Select a Location.

7. Tap **CONTINUE**.

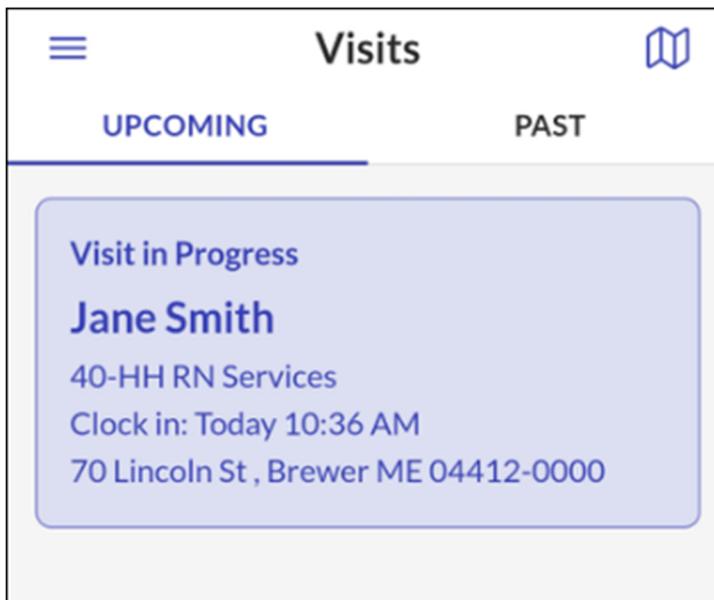| Select a Location	✕
○ Home	
⦿ Community	

Continue

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

Completing a Visit

1. Log into the SMC mobile app.
2. In the upper left corner, click on the menu, and then click on visits.
3. Your current shift will display on the "Upcoming" tab.
4. Tap on the visit in progress.

5. Did you do any of the following during your shift?

    Care in Your Home - Did you provide care in your home at any time during your shift?
    ✓   Tap TASKS and select **In-Home Support Services.**

    Expense
    ✓   Tap TASKS and select **Expense.**
    ✓   Tap VISIT NOTE and include the place of business.
    ✓   Submit copy or picture of the receipt to respite@ucpdane.org ensuring your name, client's name, reimbursement amount, and date are clear. Legible receipts are required for reimbursement. (You will receive a response verifying your email was received!

    Medication Administration
    ✓   Tap TASKS and select **Medication Administration.**
    ✓   Email medication log(s) to respite@ucpdane.org. (You will receive a response verifying your email was received!)

    Mileage Reimbursement
    ✓   Tap VISIT NOTE and provide # of miles and route information.
        •   Example: "7 - Ramona's to Garner Park to Ramona's".)

    Multiple Clients - Did you care for more than one client served by UCP?
    ✓   Tap VISIT NOTE to indicate the name of the second client and shift information.
        •   Example: "2nd client R. Rodriguez, 8:15-10:45"
        •   Note: You may need to clock in and out as you transition during your shift from one client to two clients. Seek guidance from your Service Coordinator as needed.

    Sibling Care:
    ✓   Tap VISIT NOTE and provide number of sibling and hours of care.
        •   Example: "3 Siblings 8:30a -10:30a / 2 Siblings 10:30a -11:15a" or "1 Sibling – entire time"

    Overnight Care:
    ✓   If your shift is 24 hours or longer, you must punch out and back in before your shift reaches the 24 hour mark. Your shift will time out at 24 hours if you do not do this.
    ✓   If your shift is 24 hours or longer, tap VISIT NOTE and record your sleep time (the hours that you, the provider, slept during the shift.)

6. Leave a VISIT NOTE to communicate other important shift information directly to UCP's payroll department. You can also email payroll at respite@ucpdane.org. Client specific questions or sending information such as Training Verification Forms should be emailed directly to your overseeing Service Coordinator for the client you care for.

7. Tap COMPLETE VISIT

8. Select a Location.

9. Tap **CONTINUE**.

A Summary of your visit will display. Tap **CONFIRM.**
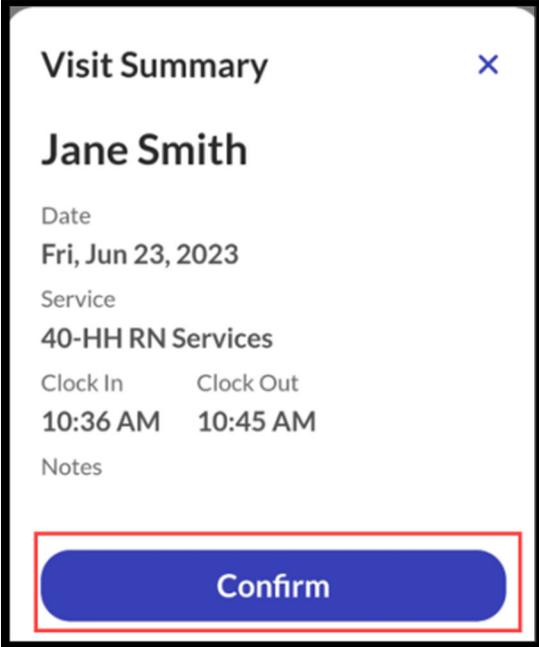
Visit Summary ✕

Jane Smith

Date
Fri, Jun 23, 2023

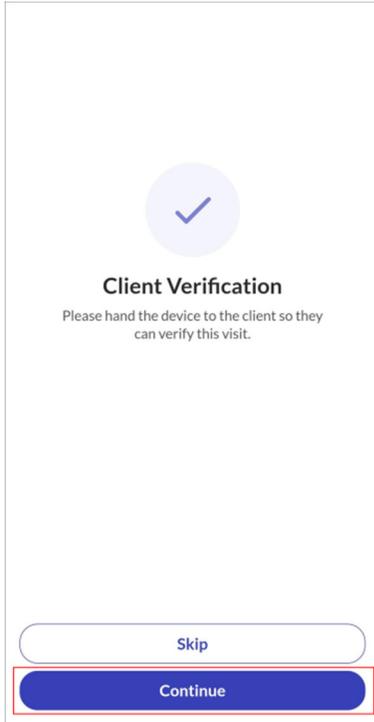Service
40-HH RN Services

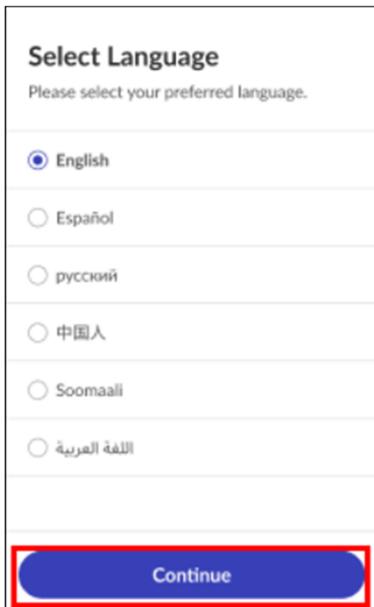Clock In   Clock Out
10:36 AM   10:45 AM

Notes

Confirm

Verify Your Shift

1. Pass your device to the parent/guardian to verify the visit! Guide them to tap **CONTINUE.**
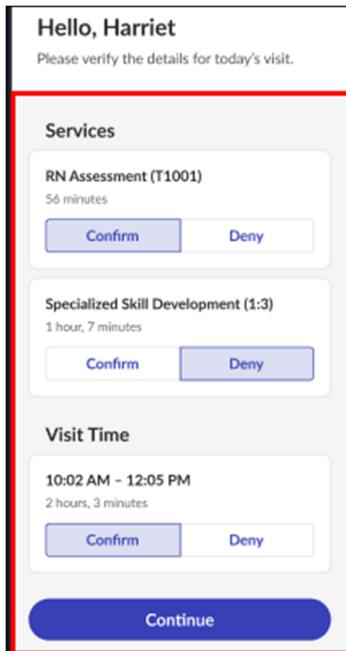

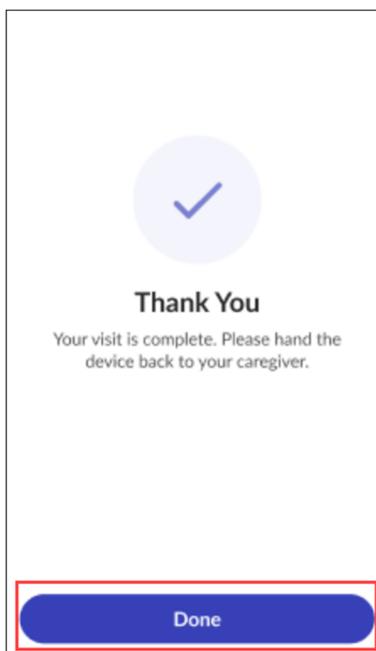2. Select a language from the list.

3. Tap **CONTINUE**.

4. Tap **CONFIRM** or **DENY** to approve or reject the **Service(s)** and **Visit Time**.

5. Tap **CONTINUE**.

6. Tap either **SIGNATURE** or VOICE RECORDING and follow the prompts for the client to verify the visit.

7. Tap **DONE**.

What should you do if you forget to punch in for a shift?

If it is during or at the end of your respite shift, punch in as soon as you realize. If it is at the end of your shift, you will need to wait 1 minute between punching in and punching out. Leave a Visit Note to inform payroll of your actual start time.

What should you do if you forget to punch out at the end of a shift?

As soon as you realize, email respite@ucpdane.org to notify us of the missing punch. We will make the correction for you.

What should you do if you forget to bring your client's Client Identifier, which is needed to punch in for your shift?

We recommend saving these numbers (along with client initials, NEVER full names) in a note's app on your phone. This way, the numbers will always be handy when you need them. If you do not have access to the numbers at the beginning of your shift, you can check the Respite Care Plan in the family's UCP Respite Binder. If you cannot find the number, please email respite@ucpdane.org to notify us that you were unable to punch in or out for your shift. We will confirm you have the missing Client Identifier for future reference and will make the correction for you.

What should you do if you have poor phone reception and/or are not connected to WIFI?

You will need to be "online" to punch in at the beginning of each shift. If you have connectivity issues, please email respite@ucpdane.org so we can assist. If it is a persistent issue, we will problem-solve alternate solutions with you and the family that you support.

Once you have punched in, you do not need to be online to punch out from your shift. The app will save your information and it will be transmitted the next time your phone goes online.