

Reference Guide

Mobile Visit Verification (MVV)

Company ID# 2-91496

SANTRAX ID	CLIENT ID

Setting Up Sandata Mobile Connect (SMC)

When first starting the application, you may receive a popup asking for permission to use your current location. Select either “Only While Using the App” or “Always Allow.” We recommend connecting to Wi-Fi (if available) when you set up the app so your information saves. *Please Note: All future app use can be done without Wi-Fi.*

1. Enter iLIFE’s provider agency number: 2-91496 into the Company ID field.

2. Enter the username.

This is your email address that you submitted to iLIFE when registering for EVV services.

3. Enter the password.

The temporary password is the same password that was received from Sandata via email.

A prompt will then appear to select security questions and answers in case you lose your password and need to reset it.

4. Select the desired security questions and enter the answers.

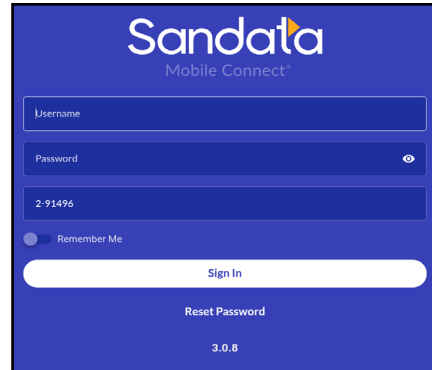
After answering the security questions, the next prompt will ask you to create a new password.

5. Enter a password in the box and confirm the password by entering it again below.

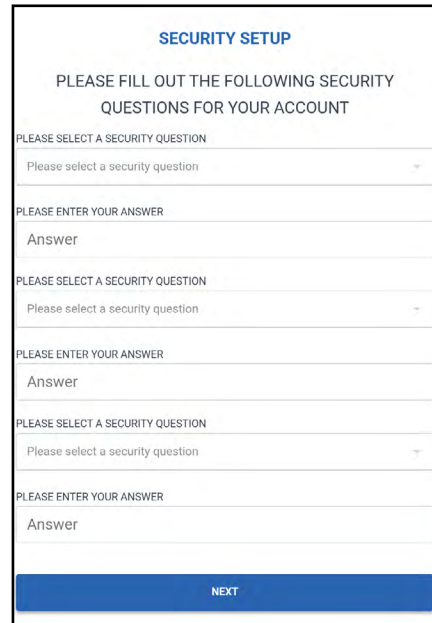
The password has to be twelve characters long and has to include one upper case letter, one lower case letter, one number, and one special symbol*.

- *For example: an exclamation mark (!), an at symbol (@), a pound sign (#), a dollar sign (\$), an ampersand (&), an asterisk (*), or an underscore (_).

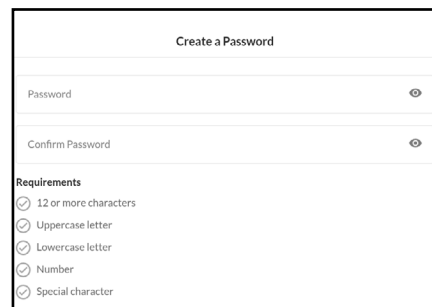
6. Log in using the new password.



The image shows the Sandata Mobile Connect login screen. It features a blue header with the Sandata logo and 'Mobile Connect' text. Below the header are input fields for 'Username', 'Password', and '2-91496' (the company ID). There is a 'Remember Me' checkbox and a 'Sign In' button. A 'Reset Password' link is also visible, along with the version number '3.0.8' at the bottom.



The image shows the Security Setup screen. It has a blue header with 'SECURITY SETUP' text. Below the header is the instruction 'PLEASE FILL OUT THE FOLLOWING SECURITY QUESTIONS FOR YOUR ACCOUNT'. There are three sections, each with a 'PLEASE SELECT A SECURITY QUESTION' dropdown menu and a 'PLEASE ENTER YOUR ANSWER' text input field. A 'NEXT' button is at the bottom.

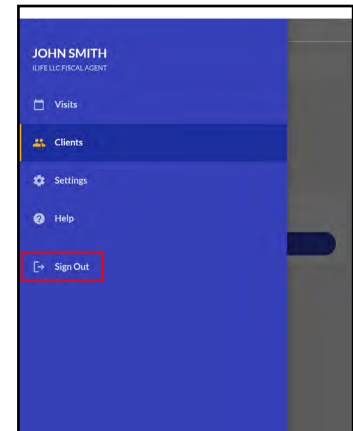
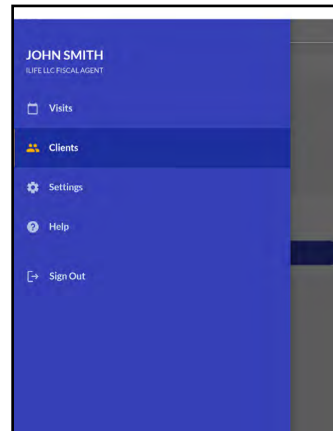
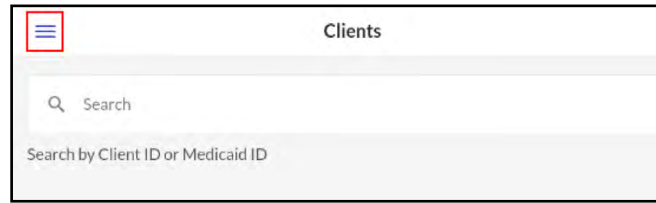


The image shows the 'Create a Password' screen. It has a blue header with 'Create a Password' text. Below the header are two input fields: 'Password' and 'Confirm Password'. There is a 'Requirements' section with a list of criteria: '12 or more characters', 'Uppercase letter', 'Lowercase letter', 'Number', and 'Special character'. Each criterion has a checkmark icon next to it.

Navigation

Next we will review the options you will see via the navigation menu.

- To get started, tap on the menu icon to expand the menu.
- From there you will see: Visits, Clients, Settings, and Help.
- Visits shows the previous seven days of visits and services provided.
- Clients allows you to search for clients using their Sandata ID number.
- Settings allows you to change your preferred language and password.
- And Help will open a help guide for Sandata Mobile Connect.
- Additionally, you can click the Sign Out icon to log out.



Starting a Visit

We will now take a look at the process to start a new visit.

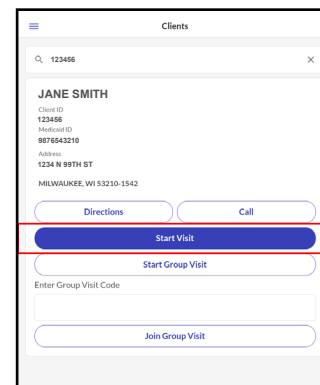
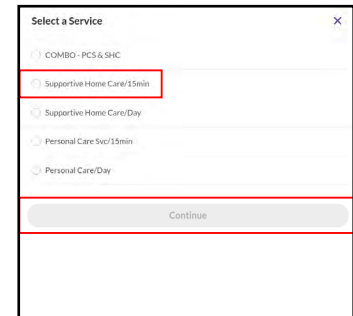
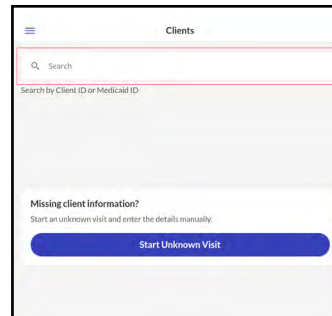
- 1. Log in to Sandata Mobile Connect.**
- 2. Expand the menu and tap on Clients.**
- 3. Enter the client's Sandata Client ID into the field and tap Search Client.**

If no results are found, first double check that you have the correct ID number and then try entering it again.

If your search was successful, the client's name, address, and ID number will show on the screen.

- 4. Tap on the Start Visit button.**

If the employee does not know the Client ID, or has another issue where they are unable to select Start Visit, tap the Unknown Visit button. A detailed explanation on Unknown Visits is mentioned later on in this guide.



5. Select which service is being provided for that day and click START VISIT.

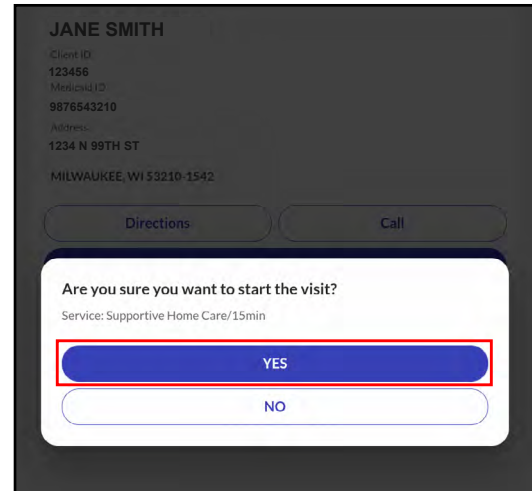
The service codes you can choose from will depend on your program and your client’s needs. The image on the right is a quick overview of EVV service codes.

Service List	
Service Code	Selection Display for Mobile on Drop-Down Menu
T1019	Personal Care Svc/15min
T1020	Personal Care/Day
S5125	Supportive Home Care/15min
S5126	Supportive Home Care/Day
COMBO	COMBO—PCS & SHC

Please Note:

- COMBO (Combo- PCS & SHC) service is only available on or after January 1st, 2021, for the IRIS program, and only if both services are being provided at the same time for the same client.
- The COMBO service is not available for Family Care programs.
- T1020 does not apply for the IRIS program.

Next, a prompt will appear asking you to confirm the correct check-in time and service before you begin.



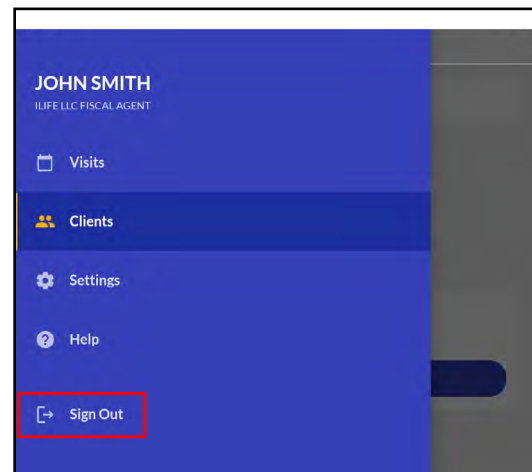
6. Select the service location (Home or Community) *Note: This is for information purposes only. There is no limit to the service location for EVV reasons in the IRIS or Family Care programs.*



7. Verify that the information is correct and tap the YES button.

8. After the previous steps have been completed, log out of the application using the menu in the upper left-hand corner and select “Sign Out.”

For security purposes, if you don’t log out manually you will be logged out after five minutes of inactivity.



Completing a Visit

We will now look at the process to complete a visit.

1. Log in to Sandata Mobile Connect.

2. Expand the menu and tap on Visits.

3. Tap on the Visit In Progress.

“Visit In Progress” will appear with two options to complete the visit. The second option is the garbage can icon in the upper right corner, which will cancel the visit.

Please Note: Tapping the garbage can icon should only be used if the employee forgot to complete the visit at the correct time.

If you choose to cancel the visit by tapping the garbage can icon, make sure to write down the date, time, and services performed for the visit so you can notify iLIFE the visit has been cancelled and corrections will be needed.

4. Tap the Complete Visit button to complete the visit.

5. Select the service location (Home or Community)

Note: This is for information purposes only. There is no limit to the service location for EVV reasons in the IRIS or Family Care programs.

6. Skip adding tasks because this is not required for IRIS and Family Care programs.

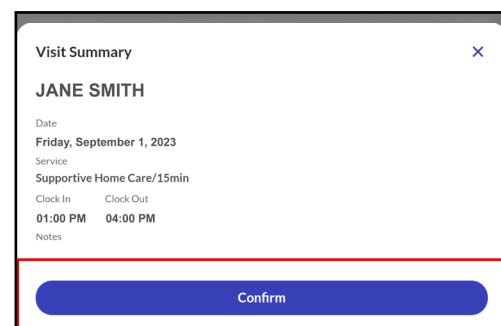
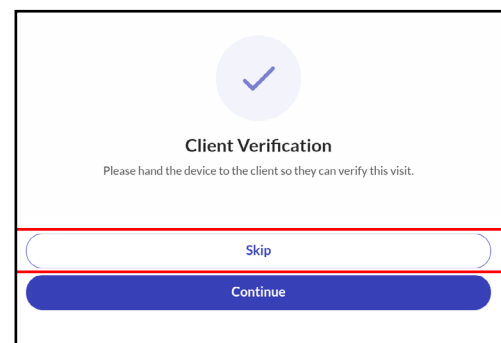
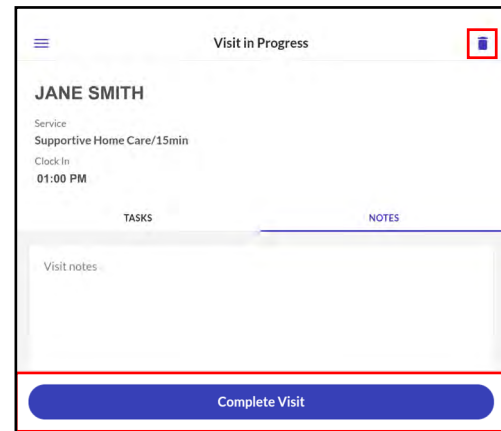
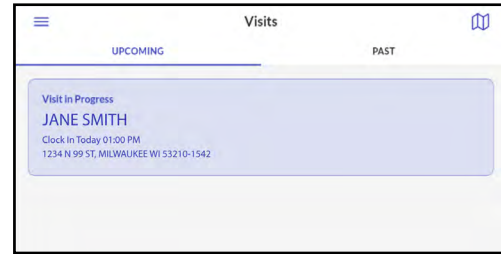
Optional: You have the ability to record a visit note, though it is not required. To do so, tap on Visit Note to leave a note about the visit for that day. The note will appear in the Visit Summary.

Please Note: You must report any medical concerns to the appropriate contacts. The note section is not a substitution for reporting urgent information.

7. Lastly, you will want to confirm the Visit Summary information and tap the Confirm button.

Client Verification

Skip client verification because this is not required for IRIS and Family Care programs.



Starting an Unknown Visit

Next we will take a look at what steps you need to take to submit an unknown visit.

An Unknown Visit can be selected if one of the following applies:

- The employee does not know the Client ID.
- The client's Medicaid eligibility is not on file.
- Sandata has not received the proper authorization.
- If the employee does not have access to Wi-fi or cell service.

If any of these apply, take the following steps:

1. Log in to Sandata Mobile Connect.

2. Tap Start Unknown Visit.

3. Enter the client's first and last name.

Please note: This information is required to move forward. The Medicaid ID number can be entered if it is known, but it is not required.

4. Next, tap Start Visit.

5. Select which service is being provided from the drop-down menu and tap Start Visit.

A prompt will appear asking you to confirm that check-in time and service is correct before you begin.

6. Select the service location (Home or Community) *Note: This is for information purposes only. There is no limit to the service location for EVV reasons in the IRIS or Family Care programs.*

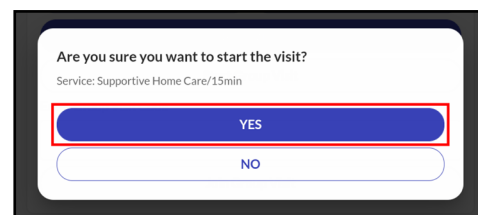
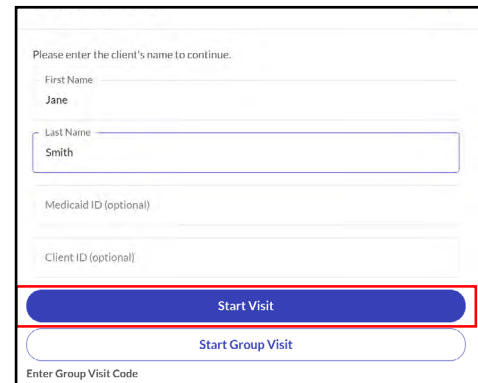
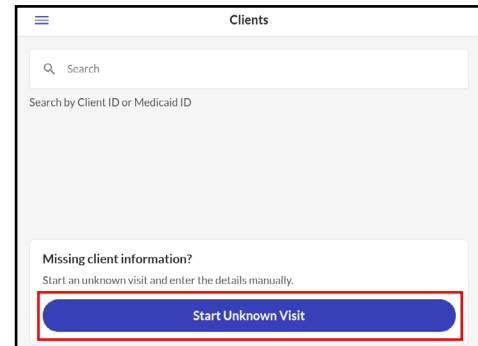
7. Verify that the information is correct and tap the YES button.

8. Log out of the application using the menu in the upper left-hand corner and select "Sign Out."

For security purposes, if you do not log out manually, you will be logged out after five minutes of inactivity.

Please refer to previous section for information on how to complete the visit.

Please note: Starting SMC in offline mode will follow the same steps as starting an unknown visit. You will see a gray banner at the top of the screen when in offline mode.



Starting a Group Visit

We will now take a look at the process to start a new group visit.

- 1. Log in to Sandata Mobile Connect.**
- 2. Enter the client's Sandata Client ID into the field and tap Search Client.**
- 3. Verify that the client's information is correct and tap Start Group Visit.**

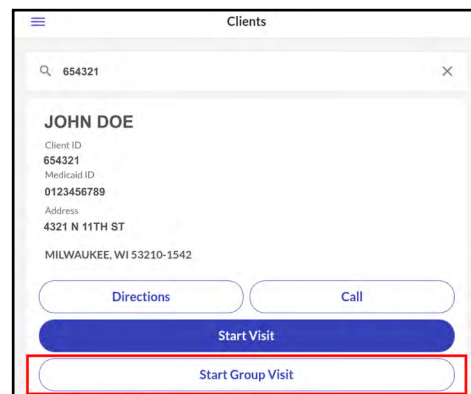
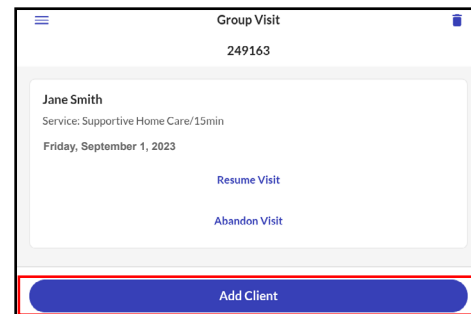
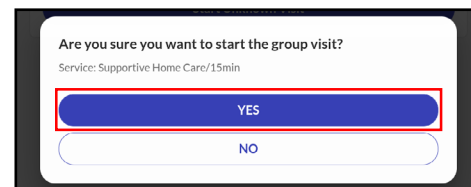
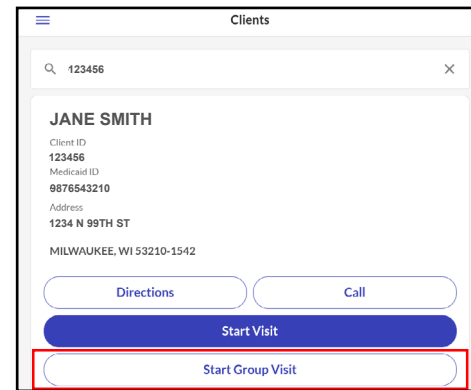
If the client is not found or if the client ID is not known, tap Start Unknown Visit and enter the client's first and last name.

Please Note: This information is required to move forward. The Medicaid ID number can be entered if it is known, but it is not required.
- 4. Tap Start Group Visit.**
- 5. Select which service is being provided from the drop-down menu.**
- 6. Select the service location (Home or Community)**

Note: This is for information purposes only. There is no limit to the service location for EVV reasons in the IRIS or Family Care programs.
- 7. Verify that the information is correct and tap the YES button.**

A code will appear at the top of the screen indicating that the session is a group visit.
- 8. To add multiple clients, tap Add Client to enter their information and repeat steps 5 - 7 for each additional client as needed.**
- 9. After the previous steps have been completed, log out of the application using the menu in the upper left-hand corner and select "Sign Out."**

For security purposes, if you don't log out manually, you will be logged out after five minutes of inactivity.



Completing Group Visits

There are a few ways to complete a group visit. The employee can complete the visit for one individual at a time or all at the same time.

1. Log in to Sandata Mobile Connect.
2. Tap Visits from the menu in the upper left of the screen.
3. Tap the visit that is in progress.



Complete All Group Visits At Once

1. To complete all group visits at once, tap Complete Group Visit.

Next you will be asked to confirm that all clients finished their visit at the same time.

2. Select the service location (Home or Community)

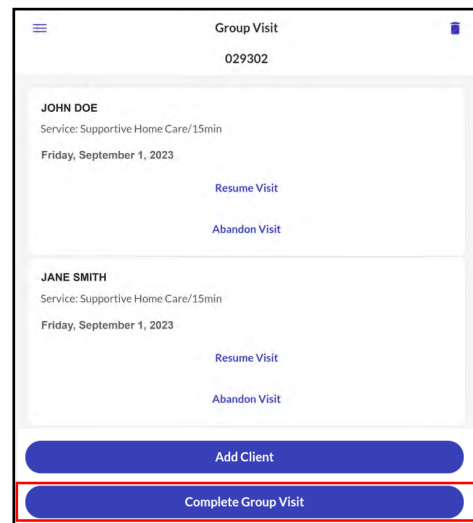
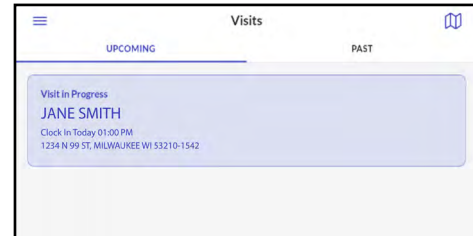
Note: This is for information purposes only. There is no limit to the service location for EVV reasons in the IRIS or Family Care programs.

3. You can then tap Confirm for those individuals and Skip adding tasks because this is not required for IRIS and Family Care programs.

The visit is now complete. You can log out and close the application.

4. After the previous steps have been completed, log out of the application using the menu in the upper left-hand corner and select "Sign Out."

For security purposes, if you don't log out manually, you will be logged out after five minutes of inactivity.



Completing Group Visits Individually

1. To complete group visits individually, tap the Resume Visit button for the client that has completed their visit.

2. Select the service location (Home or Community)

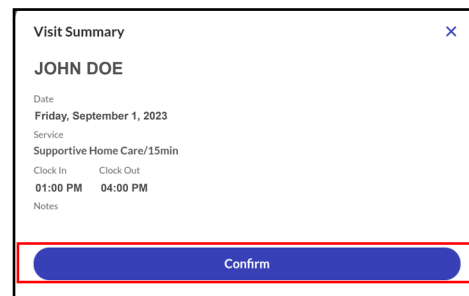
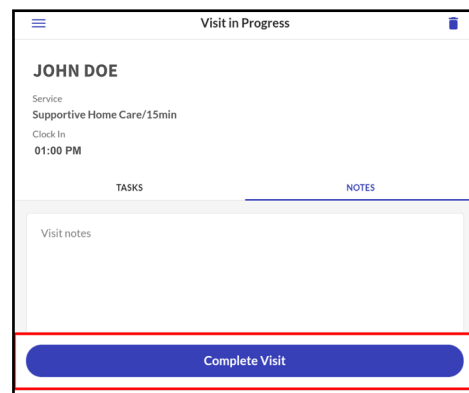
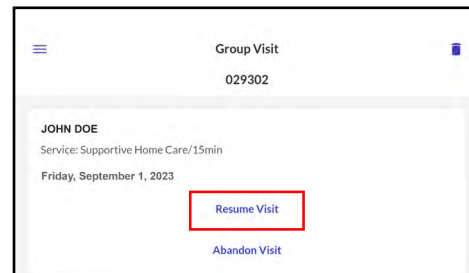
Note: This is for information purposes only. There is no limit to the service location for EVV reasons in the IRIS or Family Care programs.

3. You can then tap Confirm for that individual and Skip adding tasks because this is not required for IRIS and Family Care programs.

The visit is now complete for that client and the process can be repeated for the other client when that specific visit is finished.

4. After the last client visit has been completed, log out of the application using the menu in the upper left-hand corner and select “Sign Out.”

For security purposes, if you don't log out manually, you will be logged out after 5 minutes of inactivity.



Customer Service Information

IRIS

Phone: 888-800-5599

Email: IRIS.EVV@iLIFE.org

Family Care

Phone: 888-490-3966

Email: FC.EVV@iLIFE.org

iLIFE EVV Information & Training Material

<https://ilife.org/evv/evv-information-and-training/>