

How to Record Visits Successfully

The Sandata Mobile Connect (SMC) application is ODM's preferred method of visit capture. Follow the steps on the next slides to successfully log visits in the SMC application.

How to Download the Sandata Mobile Connect Application

You can download the SMC application on your personal device by visiting the Google Play Store or Apple Store.

Google Play Store

Click the link to download:

play.google.com/store/apps/details/Sandata_Mobile_Connect?hl=en_IN&id=com.sandata.smc.prod&pli=1&utm_medium=email&utm_source=govdelivery



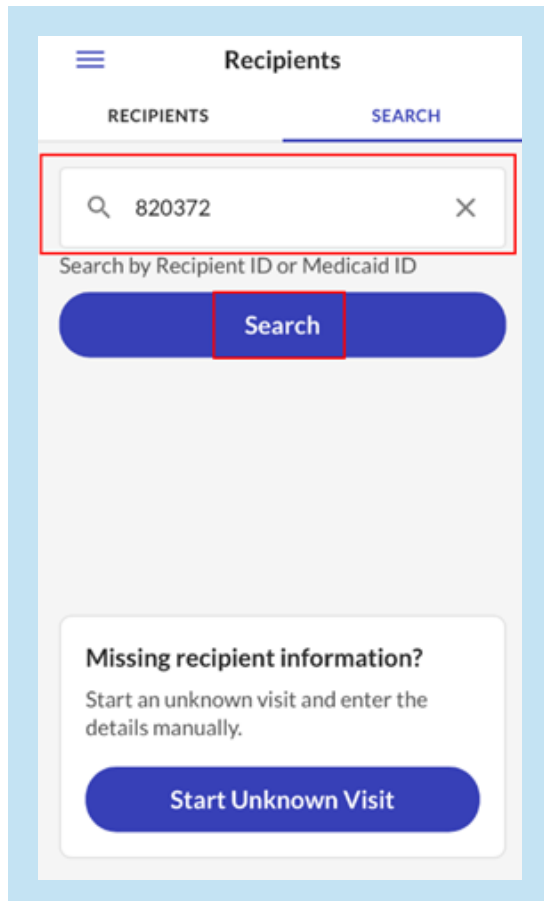
Apple Store

Click the link to download:

apps.apple.com/us/app/sandata-mobile-connect/id6451209985?utm_medium=email&utm_source=govdelivery

Starting a Visit: Step 1

After logging in to the SMC application on your phone or state-provided device, click in the **Search** field and enter the 12-digit Medicaid ID or 6-digit Recipient ID of the Recipient. Click the **Search** button.

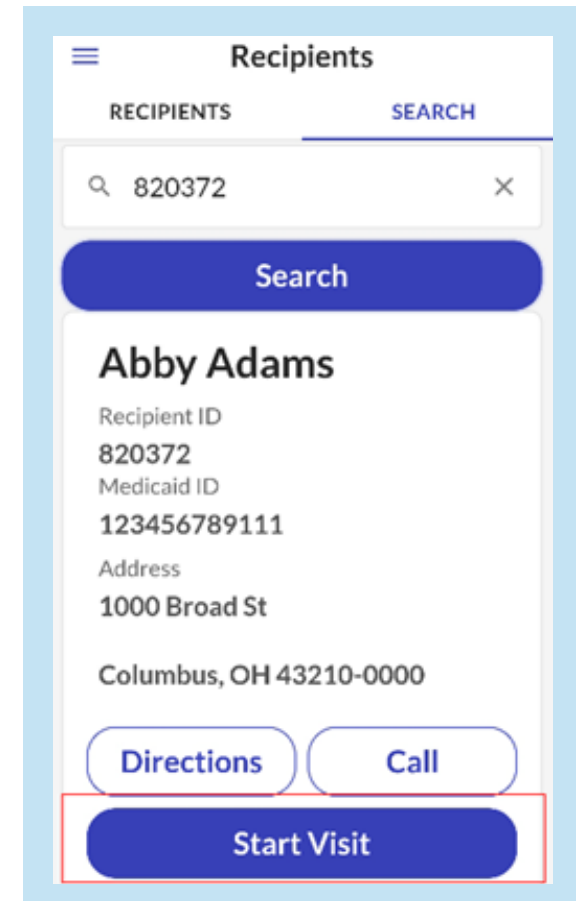


The screenshot shows the 'Recipients' screen with a search bar containing '820372' and a 'Search' button. A red box highlights the search bar, and another red box highlights the 'Search' button. Below the search bar, it says 'Search by Recipient ID or Medicaid ID'. At the bottom, there is a section titled 'Missing recipient information?' with a 'Start Unknown Visit' button.

If a matching Recipient record is found, the record will display with several options. Click **Start Visit**.

Note: If the ID entered does not match any Recipient, a “no results found” message displays.

The direct care worker can still call in and out by starting an unknown visit.



The screenshot shows the search results for 'Abby Adams'. It displays the Recipient ID (820372), Medicaid ID (123456789111), and Address (1000 Broad St, Columbus, OH 43210-0000). There are buttons for 'Directions', 'Call', and 'Start Visit'. A red box highlights the 'Start Visit' button.

Starting a Visit: Step 2

Indicate the Service being provided using the drop-down list—then click **Continue**.

On the next screen, indicate where the services begin, either Home or Community—then click **Continue**.

Note: The service drop-down list is based upon the Recipient record. If all payers and programs display, it means the Recipient record does not have a defined service.

Select a Service

☐ Passport - PCA (T1019)

☐ HPC

☒ Occupational Therapies (G0152)

Continue

Select a Location

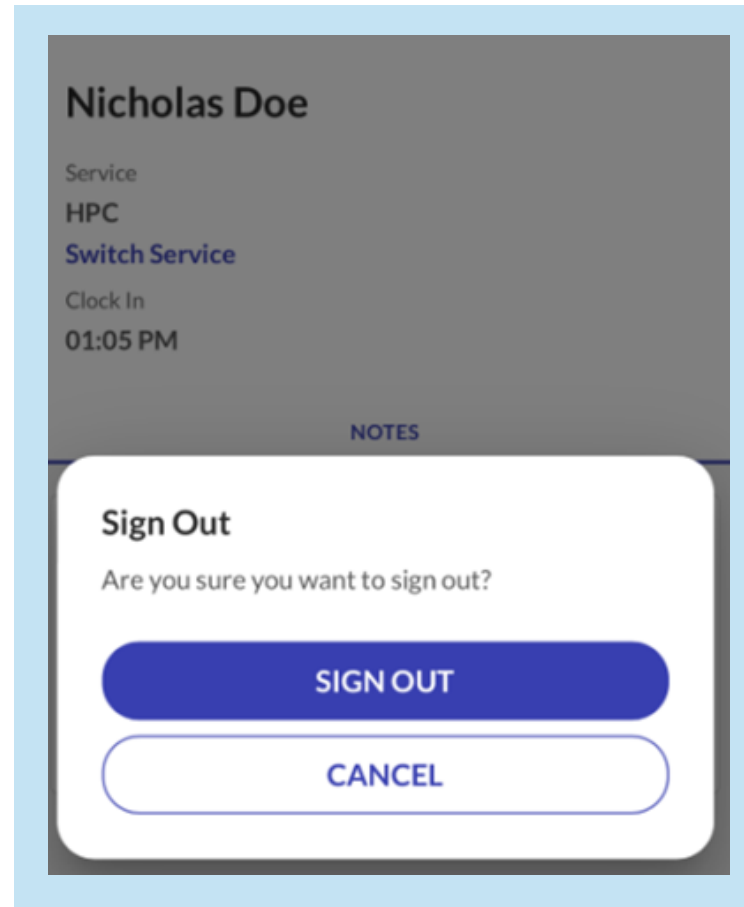
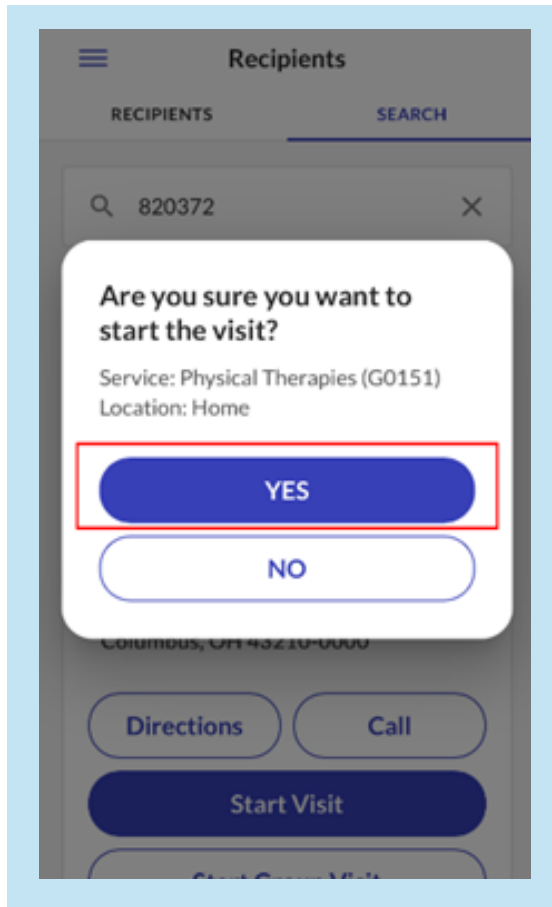
☒ Home

☐ Community

Continue

Starting a Visit: Step 3

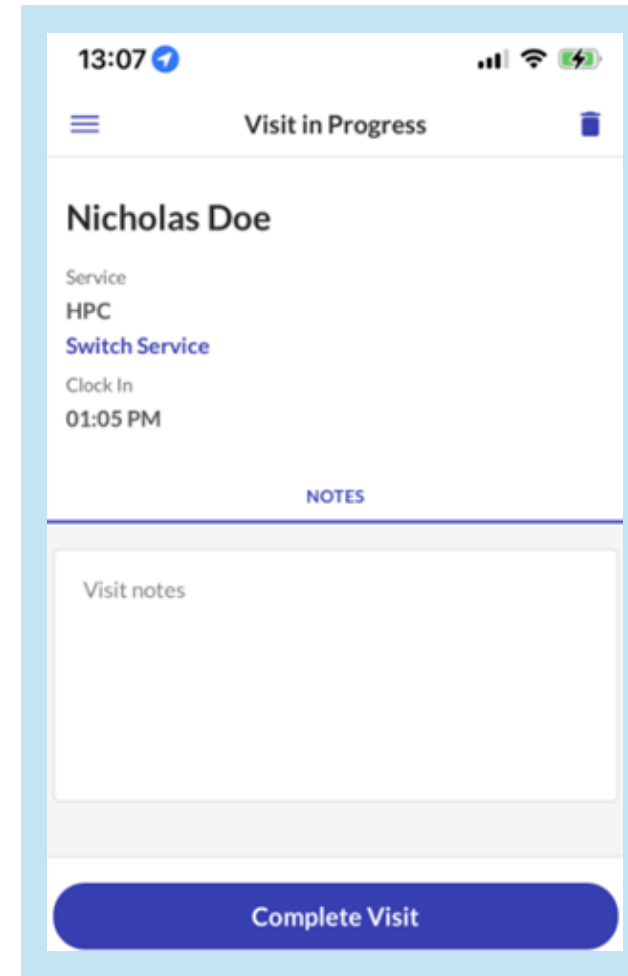
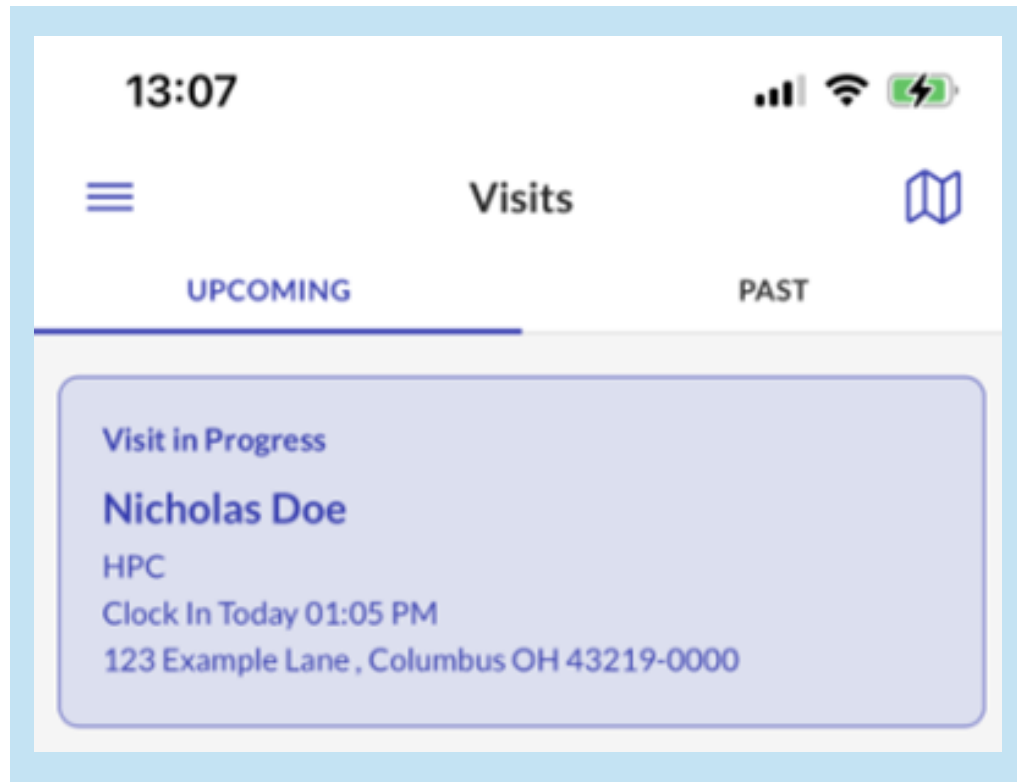
A pop-up screen appears asking the user to confirm the start of the visit. Click **Yes**. The visit is now in progress. Click **Sign Out** and proceed with providing care.



Note: SMC will continue to log hours worked while the user is signed out.

Completing a Visit: Step 1

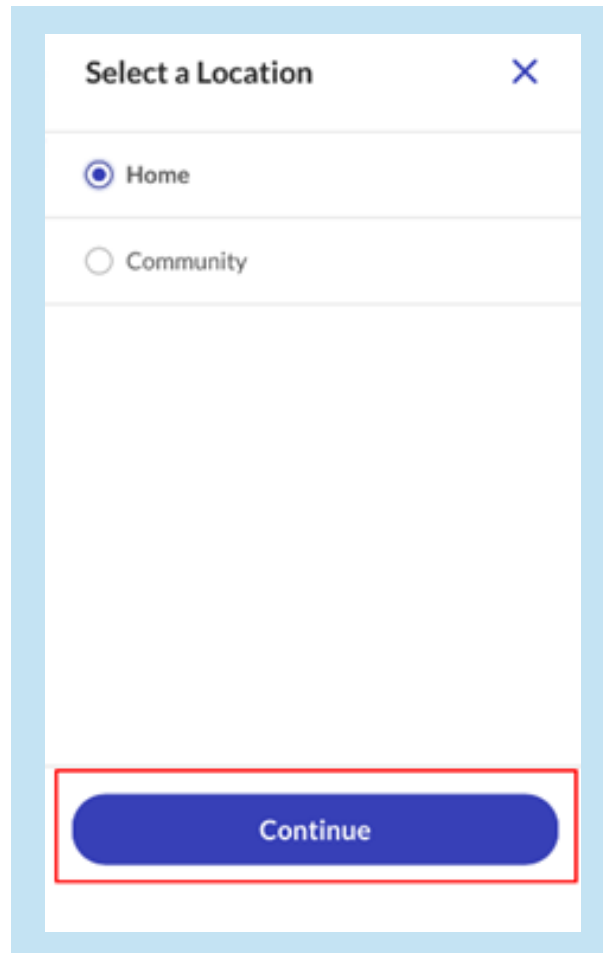
After logging in to the SMC application, the in-progress visit will display on the home screen. Click the **Visit in Progress**. The Visit Note screen displays. Enter notes if applicable, then click **Complete Visit**.



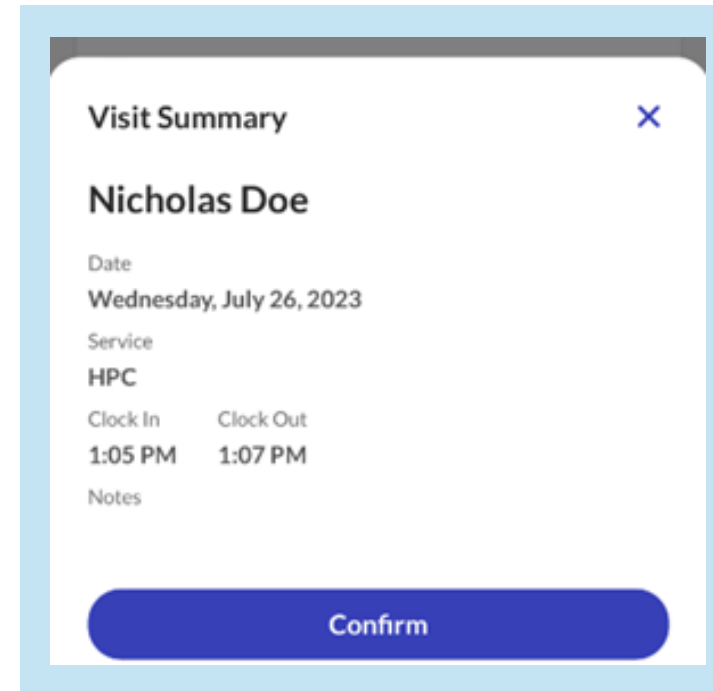
Completing a Visit: Step 2

Indicate where the services ends, either **Home** or **Community**—then click **Continue**.

The Visit Summary screen displays. Once you click **Confirm**, the visit is successfully submitted.



The 'Select a Location' screen features a title bar with a close button (X). Below the title, there are two radio button options: 'Home' (selected) and 'Community'. At the bottom of the screen, a blue 'Continue' button is highlighted with a red rectangular border.



The 'Visit Summary' screen features a title bar with a close button (X). The main content area displays the following information: the name 'Nicholas Doe', the date 'Wednesday, July 26, 2023', and the service 'HPC'. Below this, there is a table with two columns: 'Clock In' and 'Clock Out'. The 'Clock In' value is '1:05 PM' and the 'Clock Out' value is '1:07 PM'. At the bottom of the screen, there is a blue 'Confirm' button.