

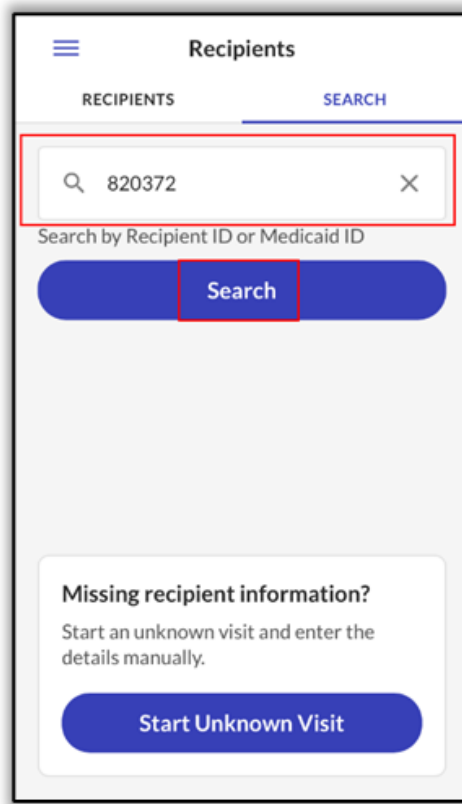
## Creating and Editing EVV Visits

### Starting an Unscheduled Sandata Mobile Connect Visit

1. Log in to Sandata Mobile Connect app.
2. Tap in the **SEARCH** field and enter the 12-digit Medicaid ID or EVV system-generated 6-digit Recipient ID of the Recipient.

NOTE: If the Medicaid ID entered is not found, the provider can still call in and out by starting an unknown visit.

3. Tap the **SEARCH** button. (If the ID entered does not match any Recipient, a "No results found" message displays).



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

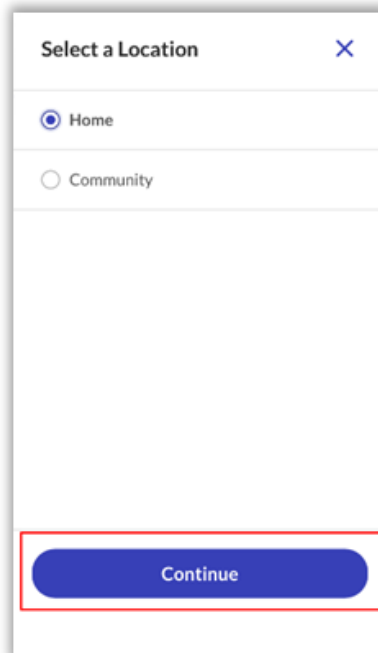
The screenshot shows a mobile application interface titled "Recipients". At the top, there are two tabs: "RECIPIENTS" and "SEARCH". Below the tabs is a search bar containing the text "820372". A blue "Search" button is positioned below the search bar. The search results display the name "Abby Adams" in bold. Below the name, the following information is listed: "Recipient ID 820372", "Medicaid ID 123456789111", "Address 1000 Broad St", and "Columbus, OH 43210-0000". At the bottom of the card, there are three buttons: "Directions", "Call", and "Start Visit". The "Start Visit" button is highlighted with a red rectangular box.

5. Select the Service from the drop-down list, then tap **Continue**.

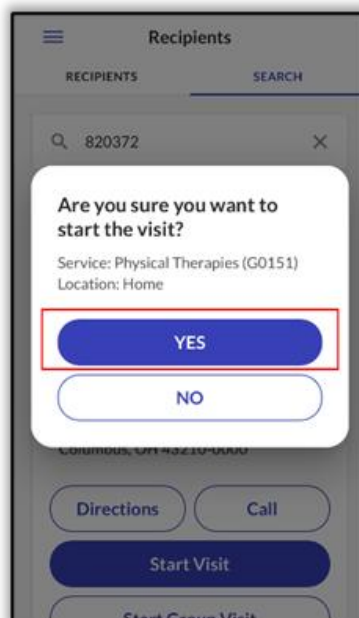
The screenshot shows a "Select a Service" dialog box with a close button (X) in the top right corner. The dialog contains a list of services with radio buttons next to them: "Passport - PCA (T1019)", "HPC", and "Occupational Therapies (G0152)". The "Occupational Therapies (G0152)" option is selected, indicated by a filled blue radio button. Below the list, there is a blue "Continue" button.

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.

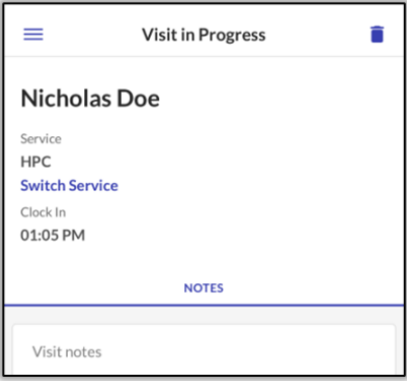
6. Select the location where services begin. Tap Home or Community and then tap Continue.



7. A pop-up screen appears asking the user to confirm the start of the visit. Tap **YES**.



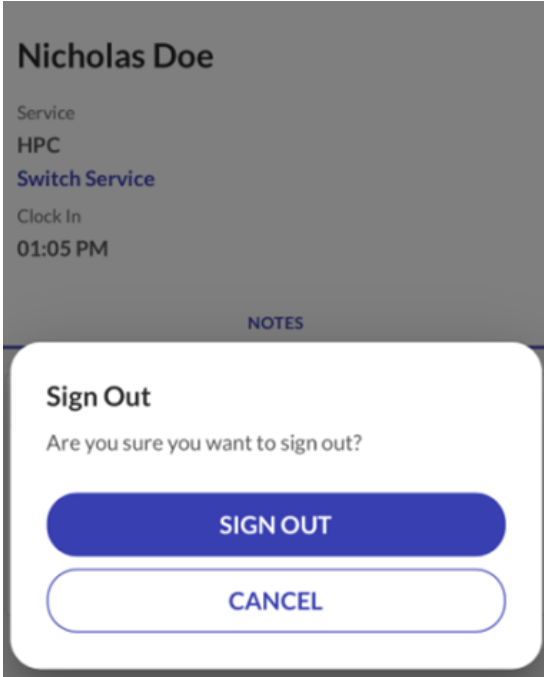
8. The visit is now in progress, and SMC will continue to log hours worked while the user is signed out.



The screenshot shows a mobile application interface titled "Visit in Progress". At the top, there is a header bar with a menu icon on the left and a trash bin icon on the right. Below the header, the name "Nicholas Doe" is displayed. Underneath the name, the text "Service" is followed by "HPC" and a blue link "Switch Service". Below that, "Clock In" is followed by "01:05 PM". A section titled "NOTES" is visible, with a text input field below it labeled "Visit notes".

NOTE: The **ABANDON VISIT** button (trash bin icon) allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the DCW/Employee forgot to call out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be updated or corrected in **Visit Maintenance**.

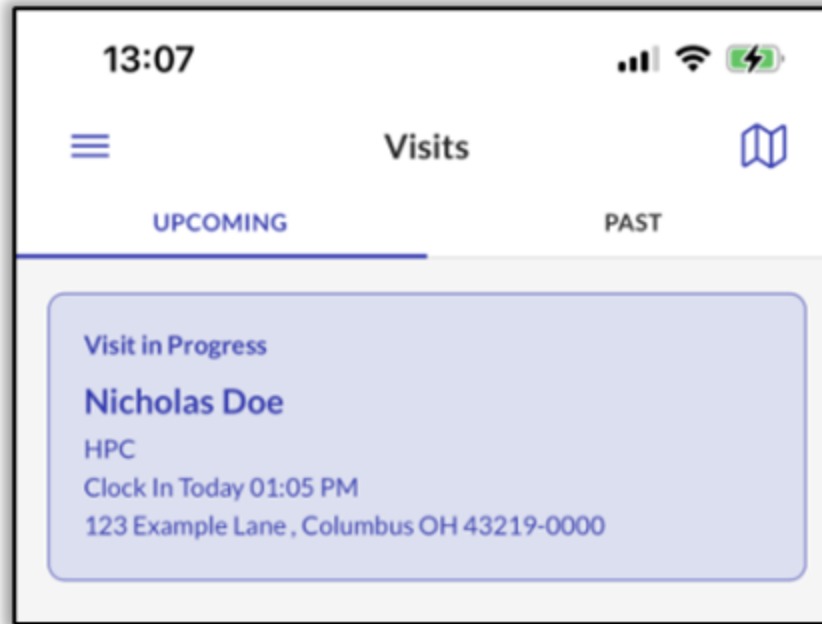
9. Tap **Sign Out** and proceed with providing care.



The screenshot shows a "Sign Out" confirmation dialog box overlaid on the "Visit in Progress" screen. The dialog has a white background and rounded corners. It contains the title "Sign Out" and the question "Are you sure you want to sign out?". Below the question are two buttons: a blue button labeled "SIGN OUT" and a white button with a blue border labeled "CANCEL". The background screen shows the same information as the previous screenshot, but it is dimmed.

# Completing a Sandata Mobile Connect Visit

1. Log into Sandata Mobile Connect app. The Home screen shows the visit is in progress. Tap the **Visit in Progress**.



2. The Visit Note screen displays. Enter notes if applicable, then tap **Complete Visit**.

The screenshot shows a mobile application interface for a visit. At the top, the status bar displays the time 13:07, a location icon, and cellular, Wi-Fi, and battery status icons. Below the status bar is a header with a hamburger menu icon on the left, the text 'Visit in Progress' in the center, and a trash can icon on the right. The main content area is divided into two sections. The top section contains the name 'Nicholas Doe' in large bold text. Below the name, it says 'Service' followed by 'HPC' and a blue link 'Switch Service'. Underneath that is 'Clock In' followed by '01:05 PM'. The bottom section is titled 'NOTES' in blue text. It contains a large white text input area with the placeholder text 'Visit notes'. At the very bottom of the screen is a blue rounded rectangular button with the text 'Complete Visit' in white.

13:07

Visit in Progress

**Nicholas Doe**

Service  
HPC  
[Switch Service](#)

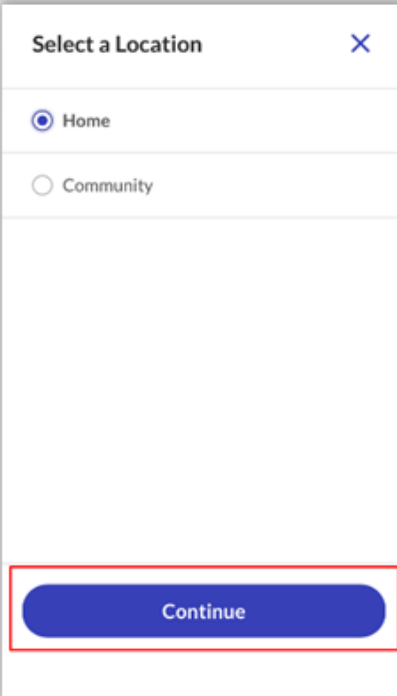
Clock In  
01:05 PM

NOTES

Visit notes

Complete Visit

3. Select the ending location. Tap **Home** or **Community** and then tap **Continue**.

A mobile app dialog box titled "Select a Location" with a close button (X) in the top right corner. It contains two radio button options: "Home" (selected) and "Community". At the bottom, there is a blue "Continue" button highlighted with a red rectangular border.

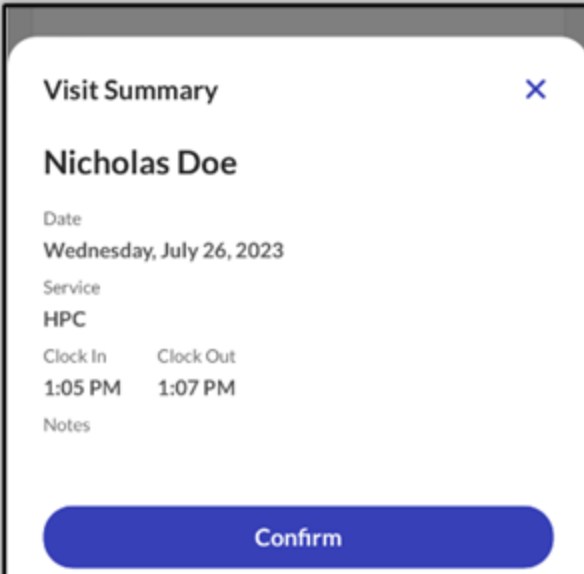
Select a Location

☒ Home

☐ Community

Continue

4. The Visit Summary screen displays. Tap **Confirm**.

A mobile app screen titled "Visit Summary" with a close button (X) in the top right corner. It displays the name "Nicholas Doe" and the date "Wednesday, July 26, 2023". Below this, it shows "Service: HPC" and a table with "Clock In" and "Clock Out" times: "1:05 PM" and "1:07 PM". There is a "Notes" field at the bottom. A blue "Confirm" button is at the very bottom.

Visit Summary

Nicholas Doe

Date  
Wednesday, July 26, 2023

Service  
HPC

Clock In	Clock Out
1:05 PM	1:07 PM


Notes

Confirm

The visit is successfully submitted.

# Adjusting Call Times and Dates

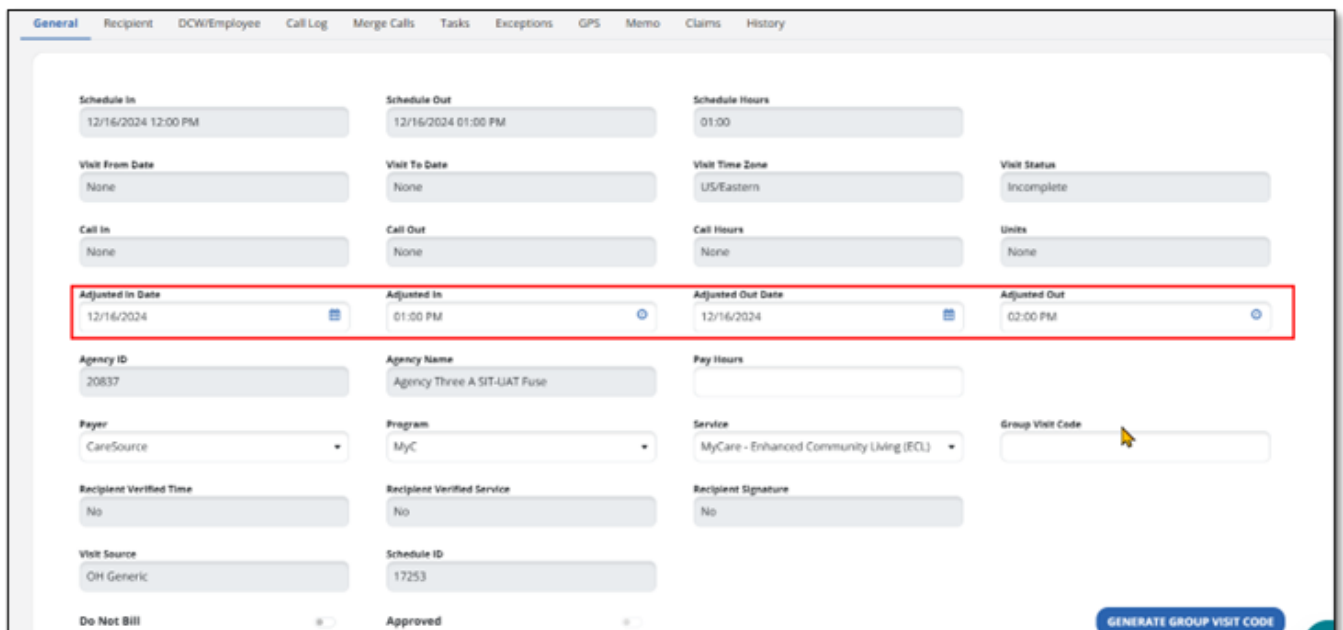
If a visit has missing or incorrect dates or call times, visit the **General** tab of the **Visit Details** screen to adjust the dates or times.

1. From the **Visit Maintenance** screen, select the Pencil  icon from the **ACTIONS** column. This will take you to the **Visit Details** screen.



RECIPIENT NAME	SCH/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
Franklin, Wilson	Smith, Morgan	MyCare - Enhanced Community Living (ECL)	12/16/2024	12:00 PM	01:00 PM	01:00											

2. On the **General** tab, enter the adjusted dates and times into the adjusted in and out fields.



**General** Recipient DCW/Employee Call Log Merge Calls Tasks Exceptions GPS Memo Claims History

Schedule In: 12/16/2024 12:00 PM Schedule Out: 12/16/2024 01:00 PM Schedule Hours: 01:00

Visit From Date: None Visit To Date: None Visit Time Zone: US/Eastern Visit Status: Incomplete

Call In: None Call Out: None Call Hours: None Units: None

**Adjusted In Date: 12/16/2024** **Adjusted In: 01:00 PM** **Adjusted Out Date: 12/16/2024** **Adjusted Out: 02:00 PM**

Agency ID: 20837 Agency Name: Agency Three A SIT-UAT Fuse Pay Hours:

Payer: CareSource Program: MyC Service: MyCare - Enhanced Community Living (ECL) Group Visit Code:

Recipient Verified Time: No Recipient Verified Service: No Recipient Signature: No

Visit Source: OH Generic Schedule ID: 17253

Do Not Bill: Approved

**GENERATE GROUP VISIT CODE**



3. As for any exception update, select the **REASON CODE** and enter a **REASON NOTE**, if it applies.

Use the **REASON NOTE** field to add additional information about the visit. Some **REASON CODES** require a **REASON NOTE**.

\* indicates required field

Reason Code \*

99 Documentation on file supports manual c...

Reason Note

Enter Reason Note

SAVE

4. Select **SAVE**. You will now be able to see the adjusted date(s) and time(s) for the visit.

\* indicates required field

Reason Code \*

99 Documentation on file supports manual c...

Reason Note

Enter Reason Note

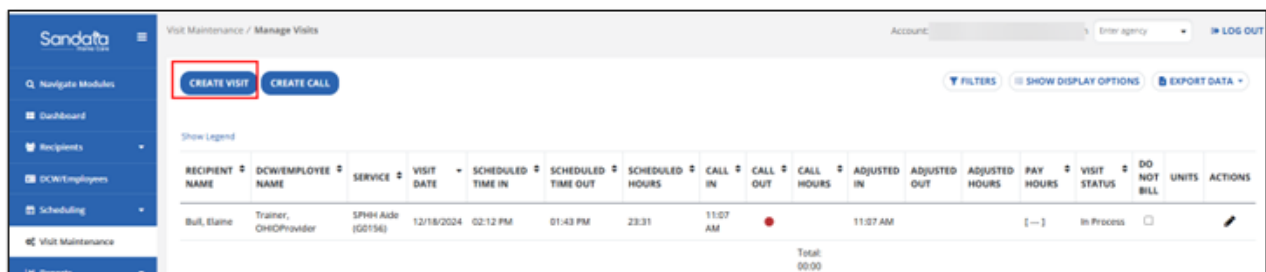
SAVE

# Creating a Visit

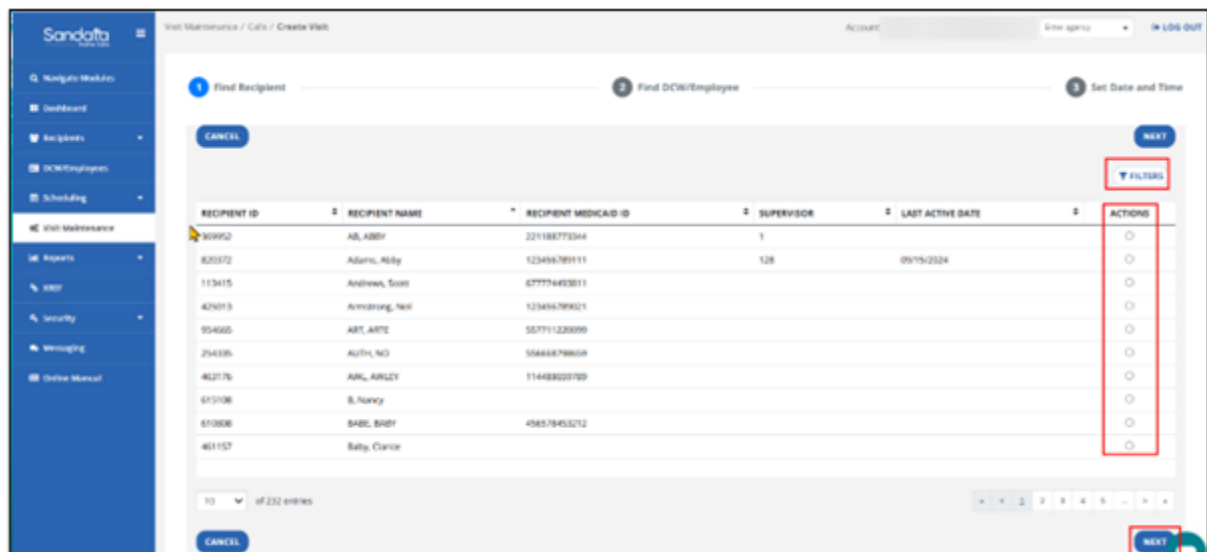
Use the **Create Visit** function when there are no calls or schedules for a visit that occurred. For example, if the DCW/Employee forgot to call in and out, you will create the visit using **Create Visit** in Visit Maintenance.

This feature is used to create visits that occurred and cannot be used to create visits in the future.

1. In the **Visit Maintenance** screen, select **Create Visit**.



2. Use filters to search for the recipient. In the search results, select the button for that recipient under **Actions**. Then select **Next**.



- Next, use **Filters** to search for a DCW (Direct Care Worker)/Employee. Under **Actions**, select the DCW/Employee. Select **NEXT**.

- In the next screen, enter the required information, including **Call Date** and **Call Times, Location, and Service** (if available).

- Then, select the **Reason Code** and select **ADD**.