





**Getting Started:** Download Sandata Mobile Connect for free from the Google Play Store or the Apple App Store, depending on your device.





**Logging in:** Upon logging in to SMC for the first time, you will need to answer security questions. You will need the following information to log in:

- Company ID: 3-8485
- Username (your email address)
- Password (set your own after initial log-in)




### Starting a Visit:

1. Log in to Sandata Mobile Connect.
2. Tap the menu icon  in the upper-left corner of the screen and select **MY VISITS** to see a list of upcoming visits.
3.  Tap the name of the visit that you want to start.
4. Tap the GPS icon  next to the address to view turn-by-turn directions using Google Maps. Tap the **CONTINUE** button.
5.  A pop-up screen appears asking you to confirm the start of the visit. Tap the **START VISIT** button and choose **YES** when prompted.
6. After completing this check-in step, proceed with providing care. The app can be closed manually, or it will log-out automatically after a period of inactivity.

### Completing a Visit:

1. Log back into Sandata Mobile Connect.
2.  Tap **RESUME VISIT**.
3. Enter the *Tasks* performed and *Visit Notes* (notes are optional).
4.  Tap **COMPLETE VISIT**.
5.  The *Visit Summary* screen displays. Tap **CONFIRM**.
6.  The *Client Verify* screen displays. Tap **CONTINUE** and pass the device to the individual receiving care.

### The following steps are completed by the individual receiving care:


7.  Select preferred language in the drop-down menu and tap **CONTINUE**.
8.  The *Client Confirmation* screen displays. The client must tap **CONFIRM** or **DENY** for both the *Service* and *Visit Times* recorded, then tap **CONTINUE**.
9.  The *Confirmation Summary* screen displays. Tap **CONFIRM**.

10. The *SIGNATURE/VOICE RECORDING* screen displays.

- **SIGNATURE:** Use finger to e-sign on the device
- **VOICE RECORDING:** Tap the red circle and state name and date. Tap the circle again to end the recording.


11.  After signing or recording the voice, tap **CONTINUE**.


12.  The *Identification Summary* screen displays. Tap **SUBMIT**.

13.  Tap **CONTINUE**. The visit is successfully submitted and the *Login* screen displays.


### Starting an Unscheduled Visit:


1. Log in to Sandata Mobile Connect

2.  Tap “**SEARCH CLIENT**” menu button and enter the Client ID, then tap **SEARCH CLIENT**.



3.  Tap **CONTINUE**.

4.  Select the service from the drop-down and tap **START VISIT**.

5.  A pop-up displays asking the employee to confirm the start of the visit. Tap **YES** to confirm the start of the visit.

6. To end the visit, follow “*Completing a Visit*” steps



## Quick Reference Guide

**Excel Home Care**

**Company ID: 3-8485**

### Features:

- **Starting a Visit**
- **Completing a Visit**
- **Starting an Unscheduled Visit**