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

Sandata MOBILE CONNECT™

Quick Reference Guide

Excel Home Care

Company ID: 3-8485

Features:

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