

Sandata Mobile Connect Agency Transition Checklist



The SMC Transition Tracking Sheet can be used to monitor the progress of the transition from MVV to SMC for each staff member.

RUN MOBILE USERS REPORT- *REPORTS>OTHER>MOBILE USERS REPORT*

- Run this report to identify which users need to transition to Sandata Mobile Connect (SMC).
- SMC users will need an e-mail address as their username.

INSTRUCT CAREGIVER TO DOWNLOAD SMC APPLICATION

- Notify caregivers to download the SMC application.
- Confirm caregiver has uploaded the application.

MODIFY SECURITY SETTING FOR EACH SMC USER - *STAFF>SECURITY*

- Navigate to the caregiver's profile and check "Mobile App User" if it is not already checked or Deselect the Mobile App User Checkbox if the Checkbox is already selected.
- Click Save.
- Enter the caregiver's Email Address into the Username field.
- Select the Mobile App User Checkbox.
- Click Save.

CONFIRM STAFF CAN LOG ON TO SMC AND SUCCESSFULLY RECORD VISIT

- Confirm the caregiver received an email with the system assigned password. Check the junk folder if the email is missing from the inbox. If no email was received, advise the Caregiver to click on the 'Forgot password?' link on the SMC login screen, and reset their password via email.
- Confirm the caregiver successfully started and ended a visit using the SMC application and the visit correctly appears in the agency EVV system. If not, log a ticket with support.
- Once all the steps above have been completed, caregivers should then uninstall the MVV application and begin to only use the SMC application for all mobile visit capture. Please do not uninstall MVV until you have completed a visit using the SMC application.