

Starting a Visit

When the employee arrives to provide care to the client, he or she will:

1. Locate the EVV Device or their personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or EVV system generated Client ID of the client.

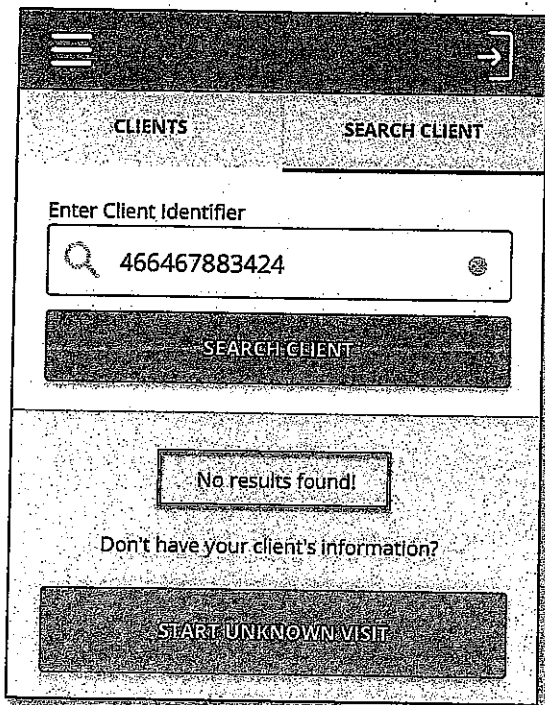
Starting an Unknown Visit



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

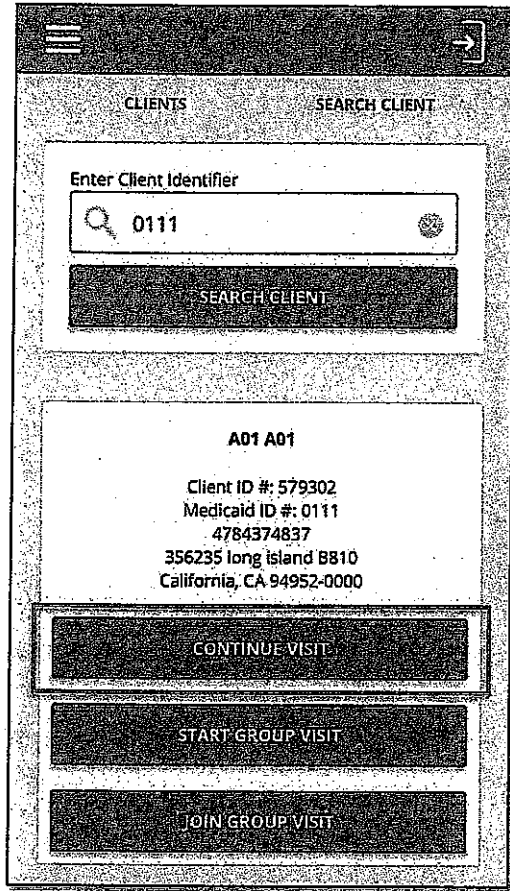
This will be covered after the known client call-in/call-out process.

4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a "No results found" message displays).



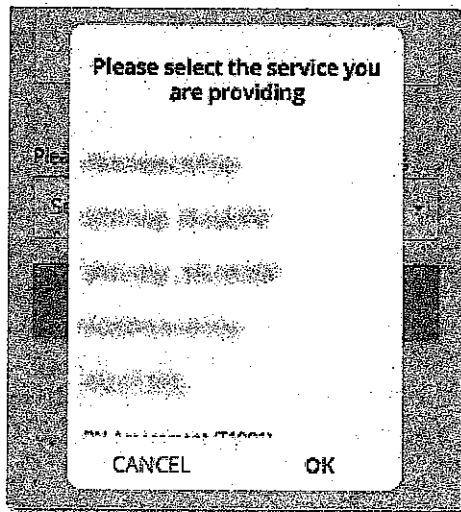
The screenshot shows the app interface with a top navigation bar containing a menu icon and a right arrow. Below the bar are two tabs: "CLIENTS" and "SEARCH CLIENT". The "SEARCH CLIENT" tab is active. Under this tab, there is a section titled "Enter Client Identifier" with a search input field containing the text "466467883424" and a magnifying glass icon. Below the input field is a button labeled "SEARCH CLIENT". Below the button, a message box displays "No results found!". Underneath this message is the text "Don't have your client's information?" and a button labeled "START UNKNOWN VISIT".

5. Tap the **CONTINUE VISIT** button when the search results display.



The screenshot shows the 'SEARCH CLIENT' screen. At the top, there are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. Below the tabs is a search bar with the text 'Enter Client Identifier' and a magnifying glass icon. The search bar contains the text '0111'. Below the search bar is a button labeled 'SEARCH CLIENT'. Below the search bar, there is a card displaying client information: 'A01 A01', 'Client ID #: 579302', 'Medicaid ID #: 0111', '4784374837', '356235 long island B810', and 'California, CA 94952-0000'. Below the card are three buttons: 'CONTINUE VISIT', 'START GROUP VISIT', and 'JOIN GROUP VISIT'. The 'CONTINUE VISIT' button is highlighted with a red box.

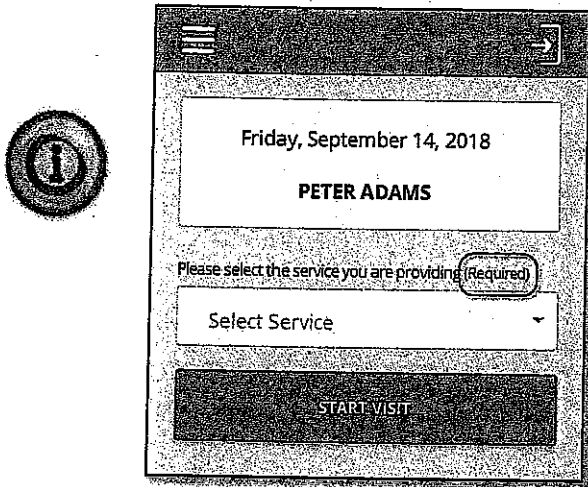
6. Select the *Service* from the drop-down list. (The list is based on the current services from the Payer section of the client record in Sandata EVV.)



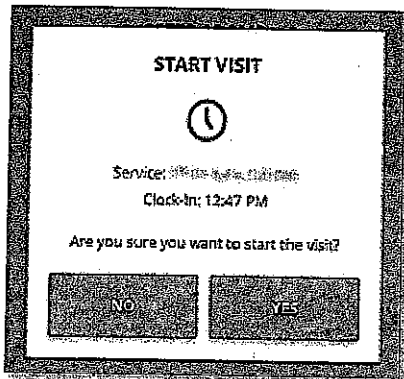
The screenshot shows a dialog box with the text 'Please select the service you are providing'. Below the text is a list of services, each with a radio button next to it. The services are: 'Personal Care', 'Companion Care', 'Meal Preparation', 'Housework', 'Transportation', and 'Other'. At the bottom of the dialog are two buttons: 'CANCEL' and 'OK'.

Service Selection Note

A service must be selected in order to start a visit. If a service is not chosen and the employee taps the **START VISIT** button, the screen displays "Required" above the Select Service field.



7. Tap the **START VISIT** button. A pop-up screen appears asking the employee to confirm the start of the visit.



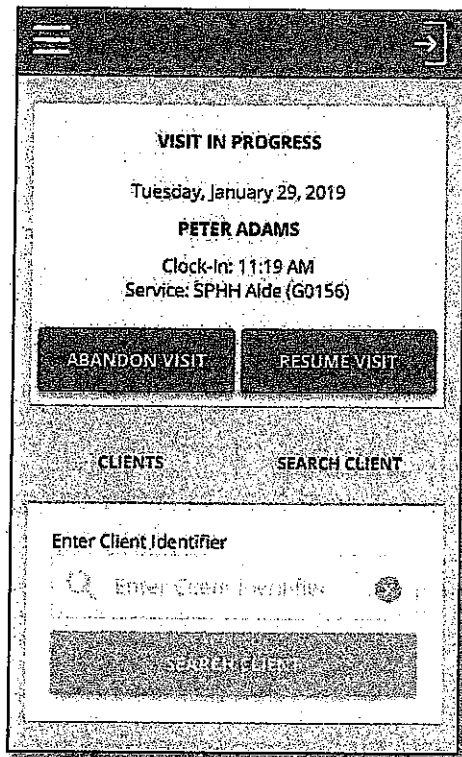
8. Log out of the SMC and proceed with providing care.



To ensure security, after five (5) minutes of inactivity, a pop-up appears allowing the user to extend the session. If there is no activity during the two (2) minute extension period, the employee is automatically logged out of SMC.

Completing a Visit

1. Log in to SMC. The *Home* screen shows the visit is in progress. Tap **RESUME VISIT**.

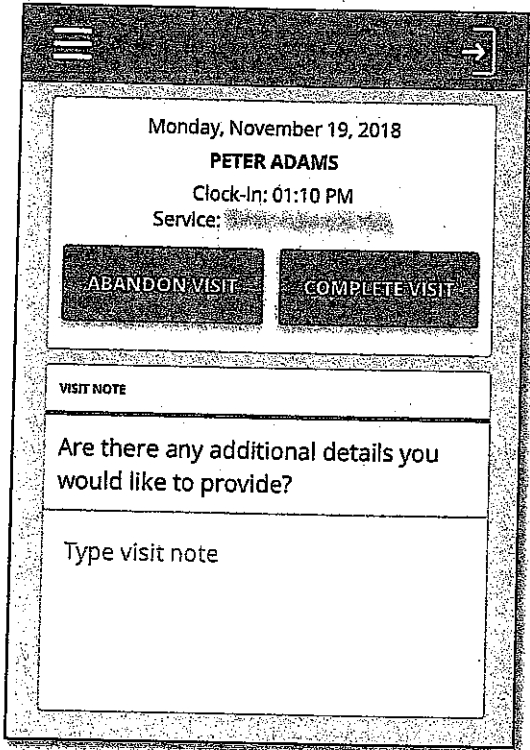


ABANDON VISIT button



The **ABANDON VISIT** button 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 employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

- The *Visit Note* screen displays. Enter notes if applicable.



Monday, November 19, 2018
PETER ADAMS
 Clock-In: 01:10 PM
 Service: [REDACTED]

ABANDON VISIT COMPLETE VISIT

VISIT NOTE

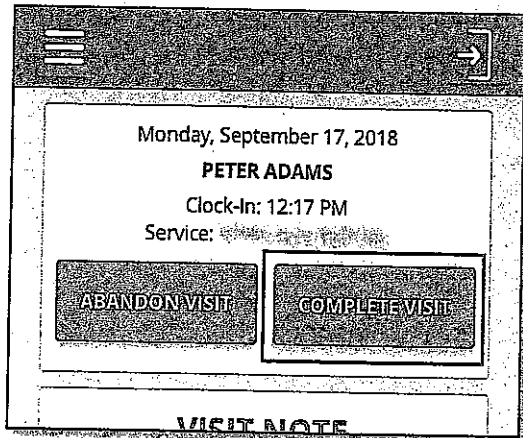
Are there any additional details you would like to provide?

Type visit note



Please be aware that notes will never be required. This **Visit Note** field should **not** be used to capture clinical data, PHI or satisfy ODM documentation requirements. This **Visit Note** field should **not** be used to capture any clinical data.

- Tap **COMPLETE VISIT**.



Monday, September 17, 2018
PETER ADAMS
 Clock-In: 12:17 PM
 Service: [REDACTED]

ABANDON VISIT **COMPLETE VISIT**

VISIT NOTE