

Sandata Mobile Connect — Caregiver Cheat Sheet

Check in. Check out. Get paid. Everything you need on one page.

START A VISIT (check in)

- 1 Log in to **Sandata Mobile Connect** (best practice: log in about an hour before your first visit so updates can load).
- 2 The **My Visits** screen shows your upcoming visits.
- 3 Tap the visit you are starting.
- 4 Tap **Start Visit**, then **Yes** to confirm.
- 5 That's it — provide care. You can close the app during the visit.

COMPLETE A VISIT (check out)

- 1 Log back in and tap **Resume Visit**.
- 2 Enter the **tasks** you performed (notes are optional).
- 3 Tap **Complete Visit**, review the summary, tap **Confirm**.
- 4 On the Client Verify screen, tap **Continue** and **hand the device to your client**.
- 5 The client picks their language, confirms the service and time, then signs or records voice consent.

IF SOMETHING GOES WRONG

- 1 **No cell signal or Wi-Fi?** The app still works. Your visit saves on the phone and syncs later. Do NOT skip checking in.
- 2 **Visit not on your list?** Use **Search Client**: enter the Client ID, tap Continue, pick the service, tap Start Visit. (Keep your clients' ID numbers where you can find them.)
- 3 **Forgot your password?** Tap **Forgot Password** and answer your 3 security questions — you don't need the office to reset it.
- 4 **Forgot to check in or out?** Tell your office right away so they can fix the visit before it's billed.

GOOD TO KNOW

- 1 Your schedule shows past and upcoming visits — use it to double-check your week.
- 2 The app can show a map and directions to your client.
- 3 If you work for more than one agency, you can switch agencies inside the app.
- 4 The app logs you out after inactivity during a visit — that's normal. Just log back in and tap Resume Visit.

GOLDEN RULES

Always check in and out — a visit with a mistake can be corrected; a visit that was never recorded may not get paid.	Check in at the client's location. GPS is captured only at check-in and check-out, not during the visit.	When in doubt, call your office. Never guess, and never share your login with anyone.
---	---	--