

The big picture: your portal, your gates

Caregivers use the Sandata Mobile Connect app; you live in the Sandata EVV Portal. The portal's modules — Dashboard, Clients, Employees, Visit Maintenance, Reports, Security — all serve one goal: every visit ends up **Verified**, because only verified visits support clean claims.

Module	What it is	How you use it
Dashboard	Real-time view of today's exceptions (refreshes every 5 minutes by default; adjustable 2–30).	Spot-check during the day. Click an exception count to jump straight to those visits.
Visit Maintenance	The module where visits are corrected and/or acknowledged. Every exception shows as a red dot in the column where the problem lives; yellow means manually entered data.	Click the dot, fix or acknowledge, select a Reason Code (and Resolution Code where your state requires one), save.
Reports	Verification, exception, and visit history reports.	Run a weekly exception report to find patterns — same caregiver, same client, same exception.

Fix vs. acknowledge: some exceptions are corrected with real data (a missing call gets a manual call with the true time); others are simply acknowledged as known-and-explained (e.g., a legitimate community visit). Either way, the exception clears only when you act on it and record the reason code.

Your daily rhythm

When	What to do
Morning (15 min)	Open the Dashboard. Unknown Client and Unknown Employee counts are your loudest alarms — they usually mean an ID typo or an offline visit missing its client info. Clear them first.
Midday (10 min)	Scan Visit Maintenance for today's Visits Without In-Call : a morning visit with no check-in may be a no-show. Call the caregiver now.
End of day (15 min)	Work the day's red dots. Aim to end each day with only visits that genuinely need next-day follow-up.
Weekly (30 min)	Run the exception report. Repeat patterns are training conversations, not data-entry work. Confirm your verification rate is where your state/payer expects it (some programs set explicit compliance targets).

Fixing the most common exceptions

Exception	What usually happened	The fix
Unknown Client	Client ID typed wrong in the app, or an offline visit where the caregiver didn't fill in the client.	Open the visit, attach the correct client from your client list, select the reason code, save.
Unknown Employee	The punch can't be matched to an employee record — often a caregiver not yet set up, or set up without the Mobile App User flag.	Attach the correct employee. If they're missing from the portal, fix the employee record (and check the mobile-app setting) so it doesn't recur.
Visit Without In-Call / Out-Call	Caregiver forgot to check in or out, or the phone died.	Click the red dot in the Call In/Out column, add a manual call with the true time (confirmed with caregiver/client), choose the reason code, save. Check Merge Calls first — a stray call close to the visit time may already exist and can be merged instead of typed.
Unmatched / Unauthorized Service	Service performed doesn't match what's on file or authorized for the client.	Verify what was actually delivered. Correct the service on the visit, or fix the client's service/authorization setup if the portal data is stale.
Missing Client Verification	Client didn't sign or record voice consent at check-out (refused, unable, or hand-off skipped).	Acknowledge with the appropriate reason code and document per your state's rules. If one caregiver skips this often, coach the hand-off routine.
GPS location flag	Punch location doesn't match a known client address. In many states this flags for review but does not block verification.	Review for patterns. Legitimate reasons (community outings, new address) are fine — update the client record when the address changed. Repeated far-away punches deserve a conversation.

Golden rule of corrections: reason codes are audit trail, not paperwork theater. Enter real times confirmed with the caregiver, pick the reason code that actually matches, and add a note when the situation needs explaining. Never manufacture a call to force a visit to verify.

Keep the source data clean

Half of all exceptions are born in stale records, not caregiver mistakes. A monthly 20-minute hygiene pass prevents them:

Area	Checklist
Clients	Addresses current (including secondary addresses), Client IDs communicated to caregivers, services/authorizations up to date.
Employees	New hires entered before their first shift, Mobile App User enabled, departed staff deactivated.
Caregiver habits	Reinforce in coaching: log in an hour before the first visit (updates load), check in/out at the client's location, never skip a punch — the app works fully offline, and passwords reset self-service via security questions.