

# SANDIS Mobile App

## Service Coordinator Access

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# SANDIS Mobile Application

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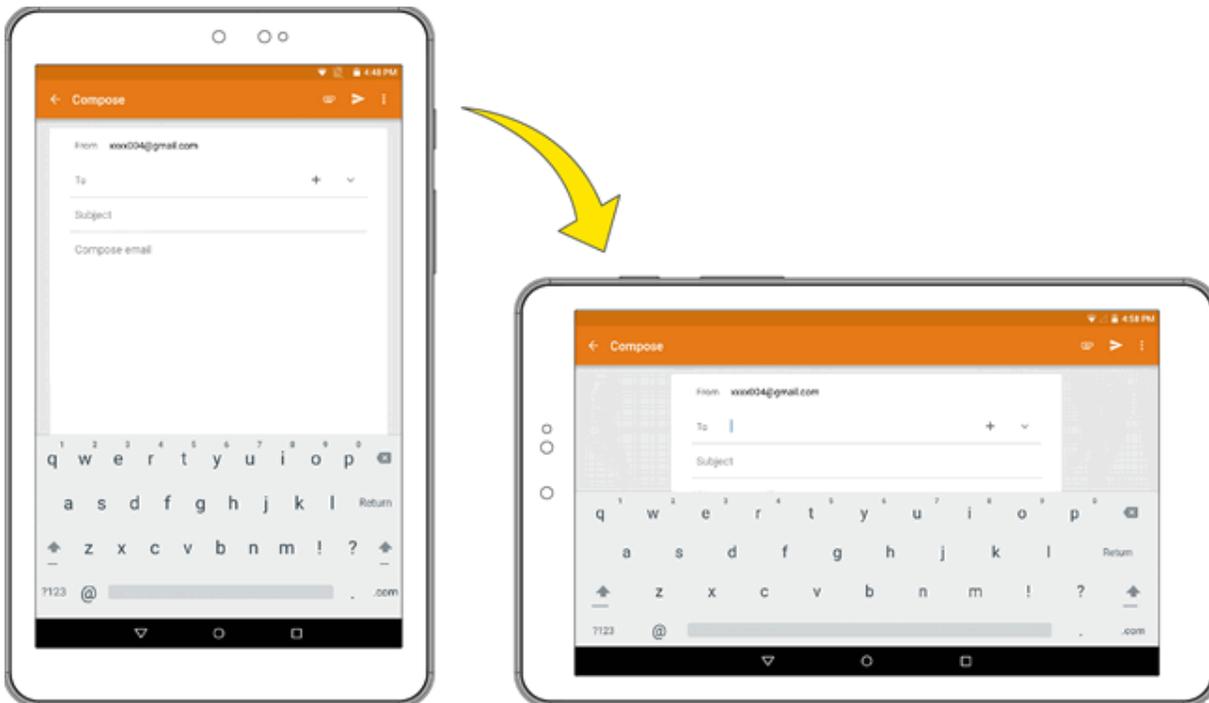
The SANDIS Mobile App gives staff quick and easy access to their caseload while out in the field. Users are able to make modifications and updates to client data, and have the ability to create new entries in frequently used modules.

This documentation will give you step by step instructions on navigating thru the application as well as some tips and additional information.

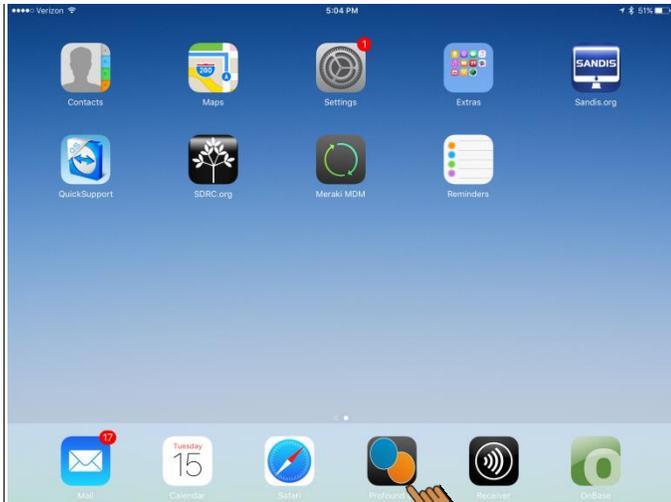
## Images in this documentation

Images in this documentation will differ as some will display images with a different orientation of the table (vertical vs. horizontal). See image below.

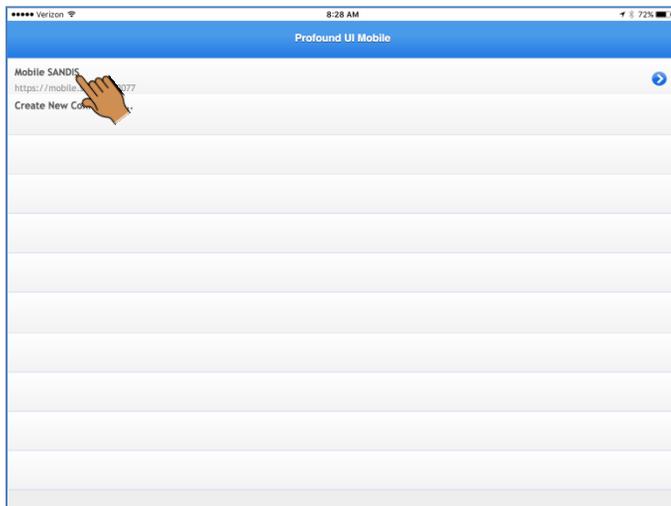
The orientation is your personal preference; however the Bluetooth keyboard will only work with the horizontal orientation.



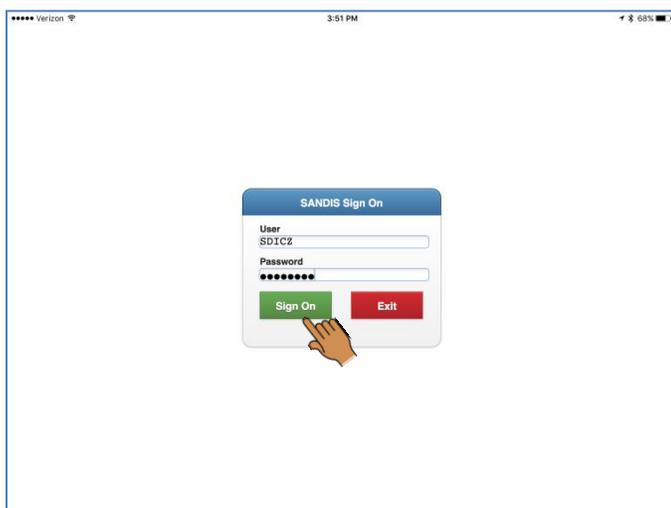
# Logging In



- To log in click on the Profound UI application.



- Click on 'Mobile SANDIS'



- Enter your SANDIS user ID & password
- Click 'Sign On'

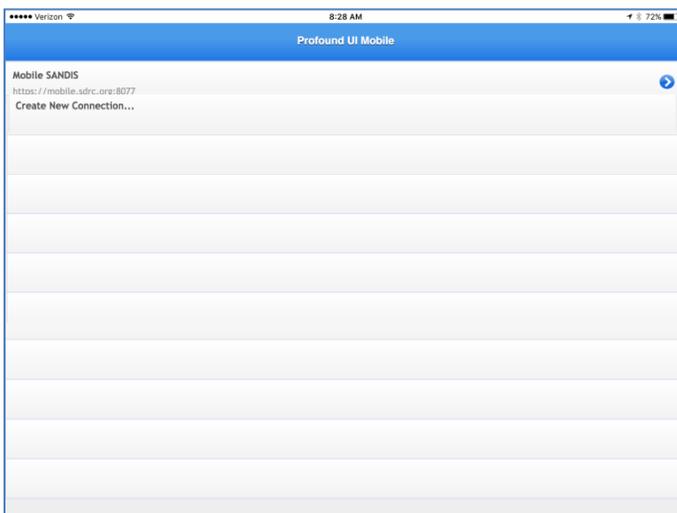
# Logging Out



- Click on the Exit button on the bottom right corner.

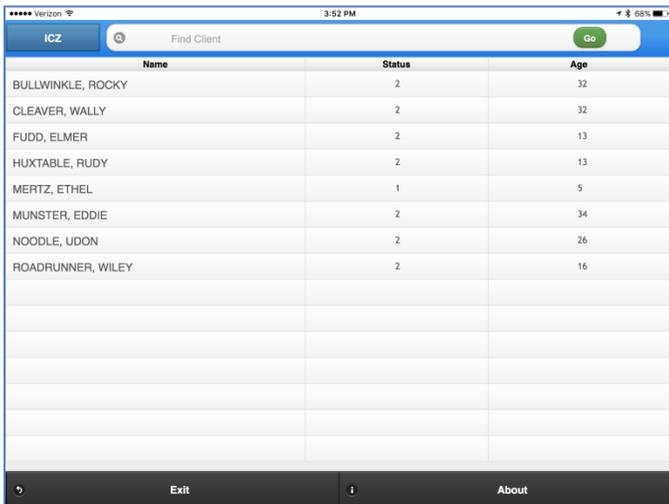


- Click the red Exit button.



- You are now completely logged out.

# Navigating Caseload



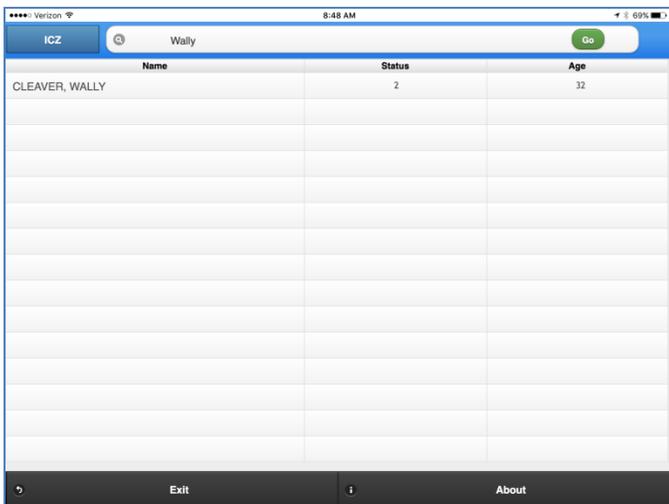
Name	Status	Age
BULLWINKLE, ROCKY	2	32
CLEAVER, WALLY	2	32
FUDD, ELMER	2	13
HUXTABLE, RUDY	2	13
MERTZ, ETHEL	1	5
MUNSTER, EDDIE	2	34
NOODLE, UDON	2	26
ROADRUNNER, WILEY	2	16

- When logged in, your caseload will appear



Name	Status	Age
BULLWINKLE, ROCKY	2	33
CLEAVER, WALLY	2	32
FUDD, ELMER	2	13
HUXTABLE, RUDY	2	13
MERTZ, ETHEL	1	5
MUNSTER, EDDIE	2	34
NOODLE, UDON	2	26
ROADRUNNER, WILEY	2	16

- Navigate through the caseload by swiping up and down on your screen



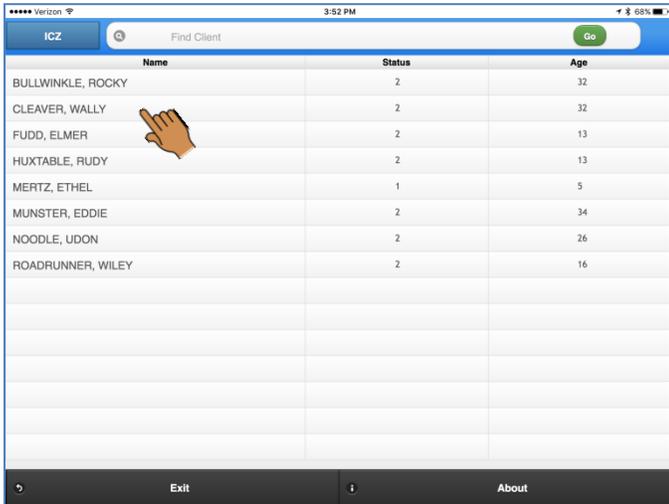
Name	Status	Age
CLEAVER, WALLY	2	32

- You can also do a name search within the current caseload by entering the client last, first, or partial name
- Click, 'Go'

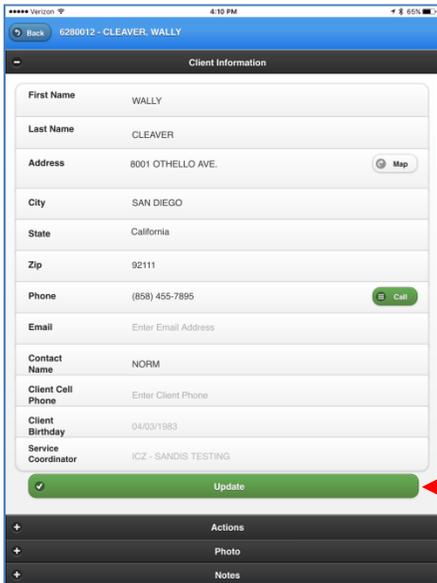
## NOTES

- The name search will not look for clients in the entire system. You will need to use the On Call Search feature.

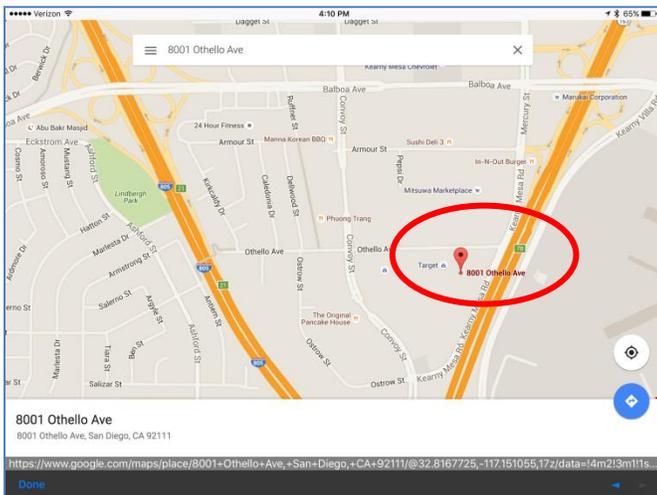
# Accessing Client Record



- To access a client record, click on the client name

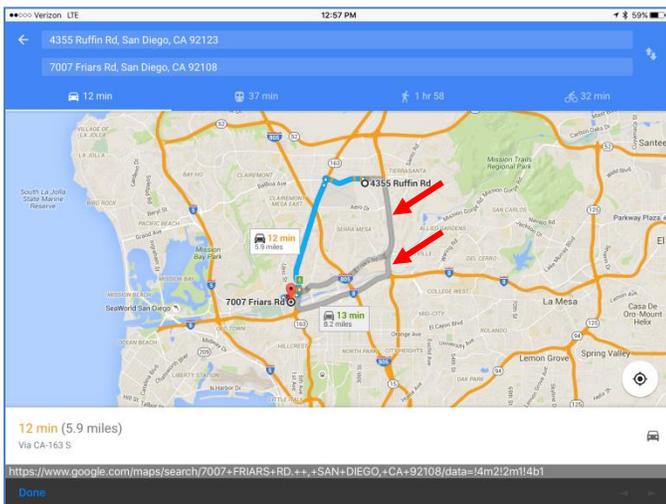


- Client Information page will appear
- Any items you have update access to in your desktop SANDIS, you can also update here (client address, phone number, email, etc.).
- If you do make changes, make sure and click the green Update button at the bottom.
- Towards the bottom you can find the assigned Service Coordinator. This can be helpful when looking up clients when on-call.

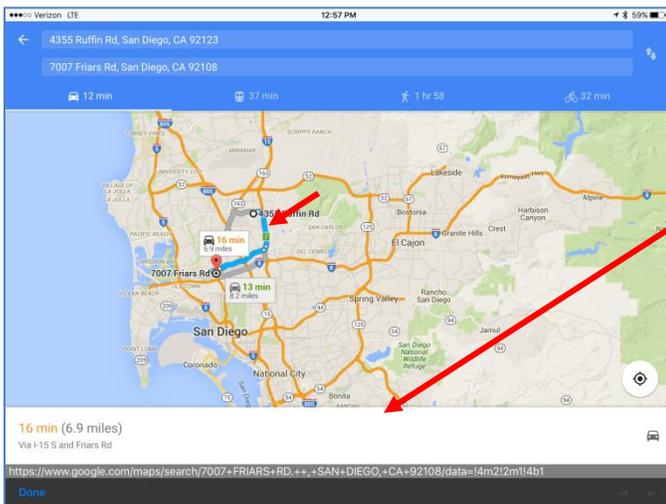


## Map Button

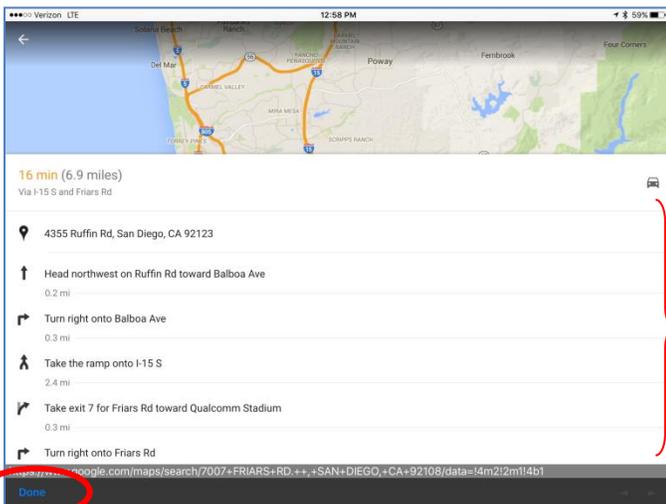
- The Map button next to the clients address can be used to route yourself to the clients address either from your current location or a manually entered location.
- Clicking on the Map button will bring up Google Maps with the clients address in a red pin.
- To route to the client address, click the blue button on the bottom right section of the screen.



- In the 'from' address, click on the 'Your Location' button or manually enter an address.
- Google Maps will highlight the quickest route but notice the alternate routes in gray.
- Click on the gray outlines for alternate routes.



- In this example an alternate route was selected.
- Click here to view routing details.

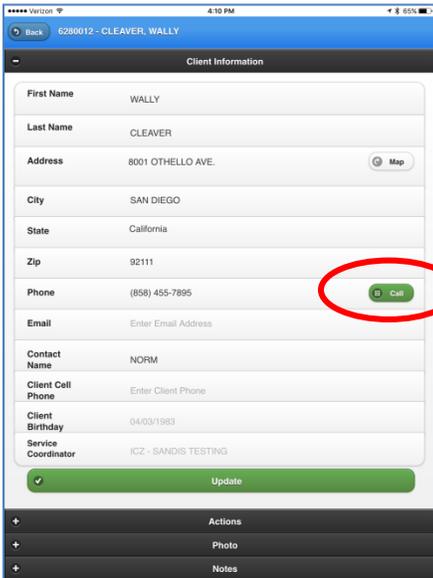


- Step-by-step directions will display.
- Once you are done, click the 'Done' button on the bottom left corner.
- You will be taken back to the Client Information page.

## NOTES

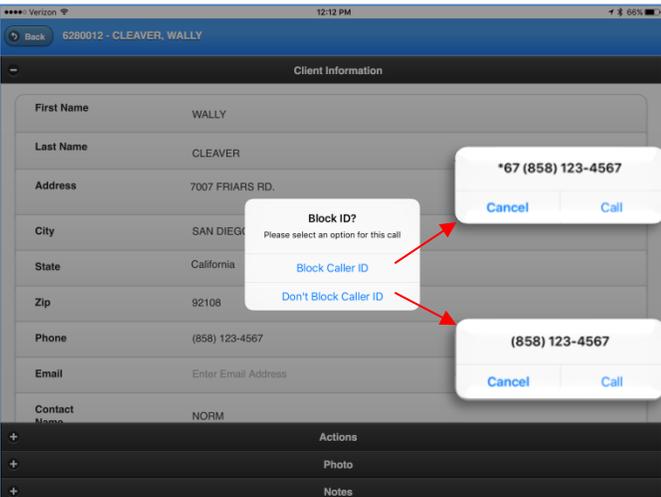
- This feature will not give voice directions.
- You can zoom in and out of maps by pinching in and out of the screen using your fingers.





## Call Button

- The Call button can be used if you are using the application on your phone. This will not work on a tablet.



- Phone calls with Phones:

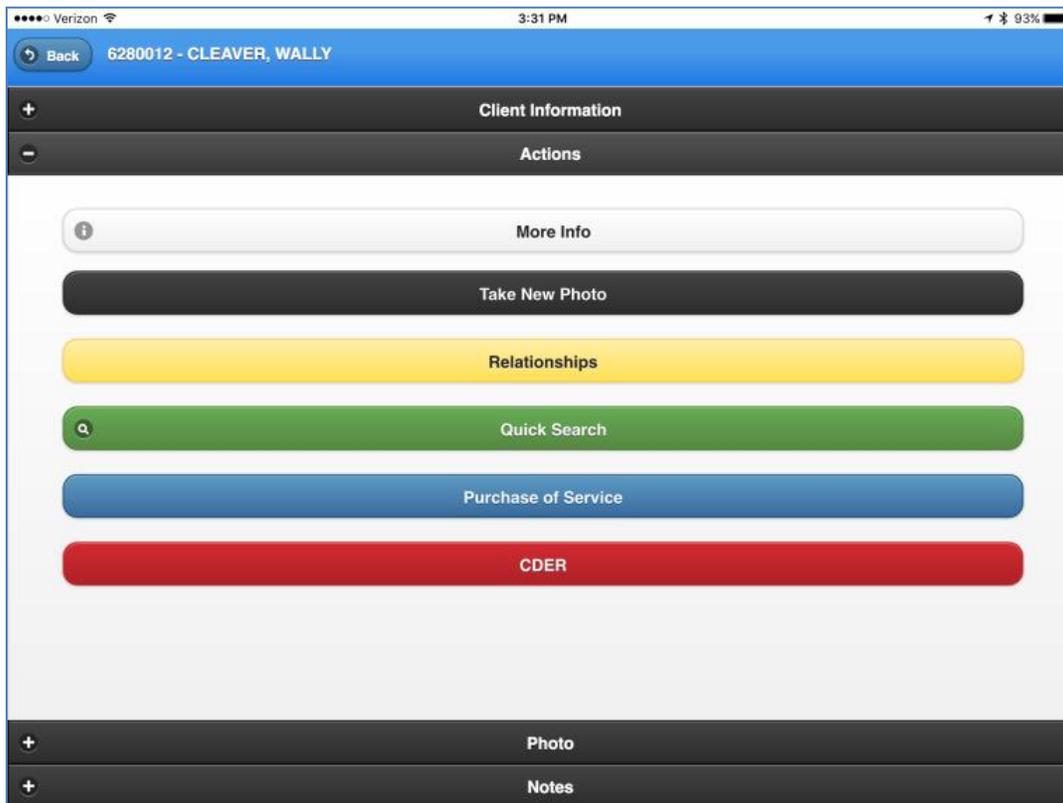
**Android Phones:** The 'Block Caller ID' features will work as designed.

**Apple Phones:** If using Apple phones, the Block Caller ID feature will not function due to hard coded Apple restrictions. You will have to go to Settings and block caller ID's that way.

# Actions

Under the header of Actions, there are several applications which will be reviewed one at a time.

Keep in mind as new developments occur with the SANDIS app, the list of items in here will grow.

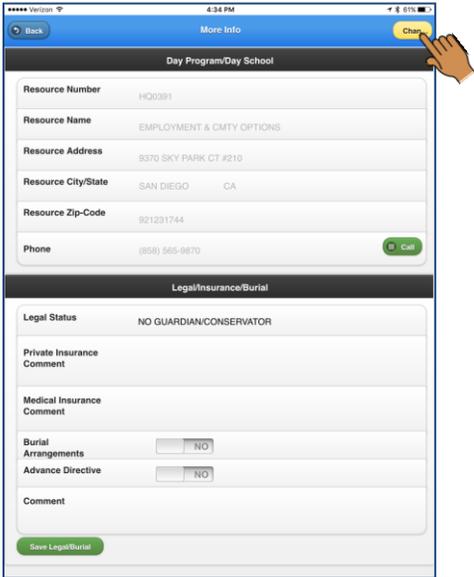


# More Info tab

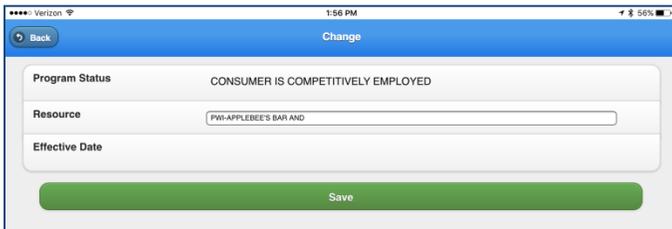
## What is under the More Info?

Day Program/School Program

Legal/Insurance/Burial Comments



- To make changes to the Day Program/Day School, click on the yellow Change button on the top right corner.



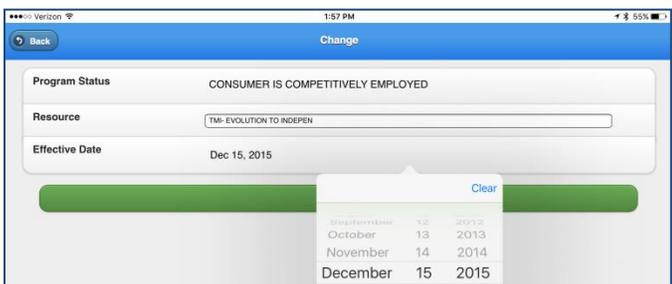
- To make changes to the Day Program/Day School, click on the yellow Change button on the top right corner.

- Delete the current entry.



- Start typing the new resource and a list of options will display.

- Make your selection.



- Enter the Effective Date using the drop down calendar & click the green SAVE button.

- Once you are all done click the blue Back button on the top, left corner.

Verizon 3:47 PM 91%

Back More Info Chan...

Resource Number @04287

Resource Name PWI-APP

Resource Address 3030 PL

Resource City/State NATION

Resource Zip-Code 91950

Phone 475-185

Call

LEGAL STATUS

- NO GUARDIAN/CONSERVATOR ✓
- CONSUMER'S PARENT OR RELATIVE
- PUBLIC GUARDIAN
- CONS-NOT DDS
- DIRECTOR OF DDS
- COURT (DEPENDENT CHILD)
- REGIONAL CENTER DIRECTOR
- OTHER
- UNKNOWN

Legal Status NO GUARDIAN/CONSERVATOR

Private Insurance Comment

Medical Insurance Comment

Burial Arrangements NO

Advance Directive NO

Comment

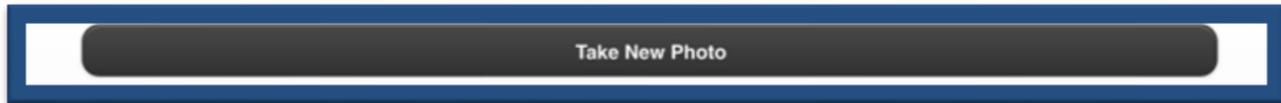
Save Legal/Burial

- You can update the Legal Status by clicking on the Legal Status line for your options to display.
- You can also update Burial Arrangements, Advance Directive, and Comments.
- Make sure to click Save Legal/Burial button to accept changes.
- Once you are all done click the blue Back button on the top, left corner until you exit back out to the Actions list.

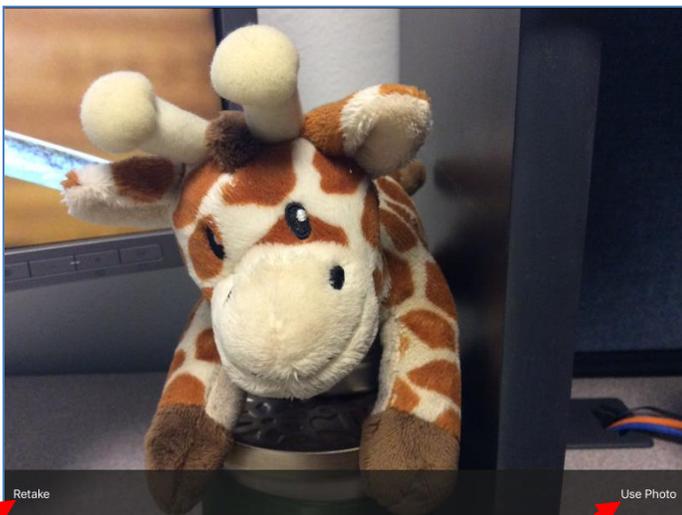
# Take New Photo tab

What is under the Take New Photo tab?

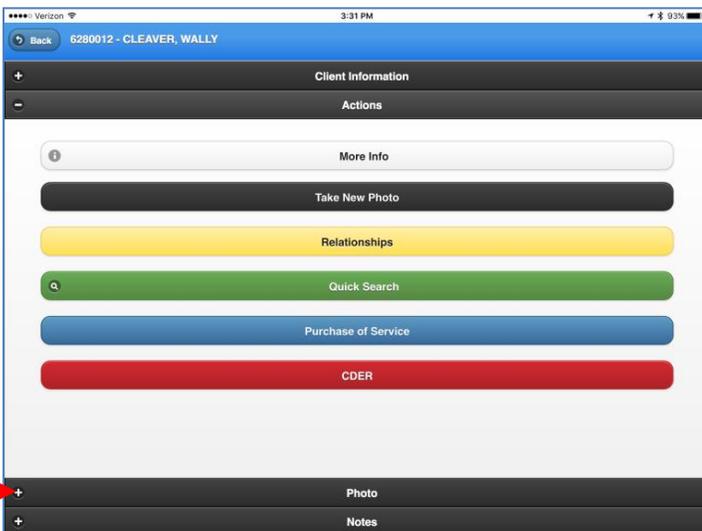
This activates the camera on your device.



- You can zoom in and out, focus, and take a photo by clicking on the white 'capture' button.



- You can click on Retake or Use Photo if satisfied with the photo.

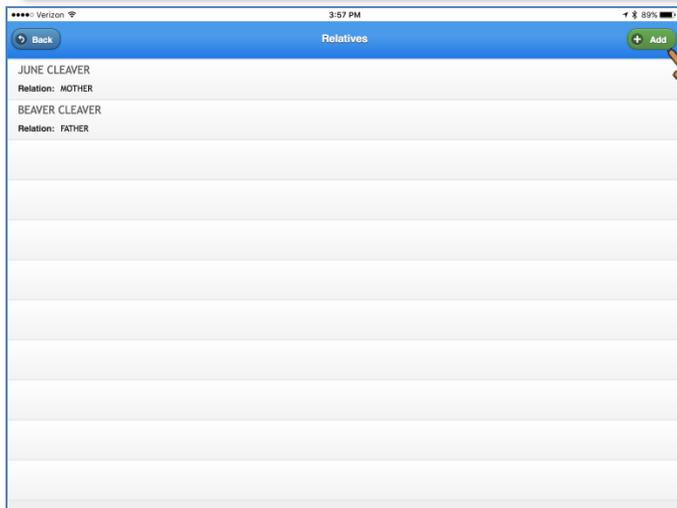
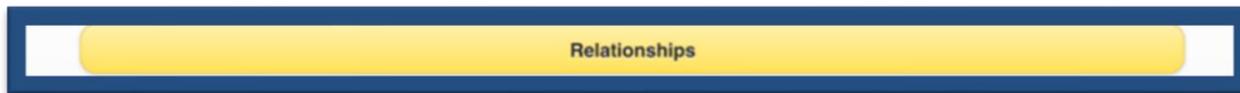


- The photo will now display under the Photo button.
- Keep in mind the photo **is not** stored on your device. It is stored on a remote server.

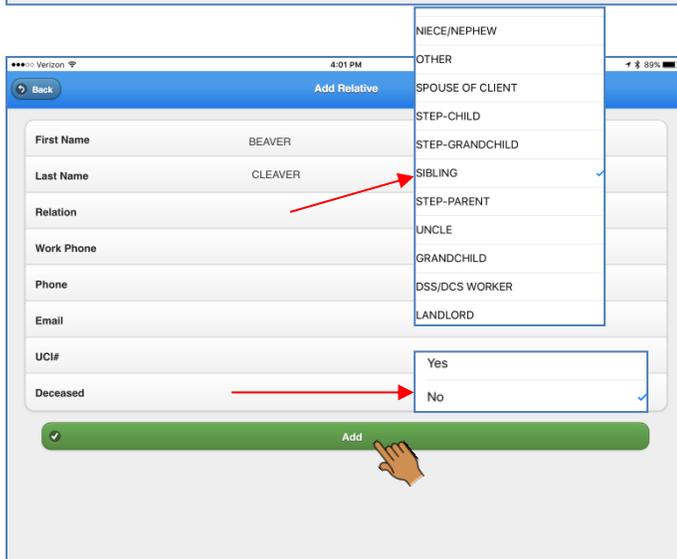
# Relationships tab

## What is under the Relationships tab?

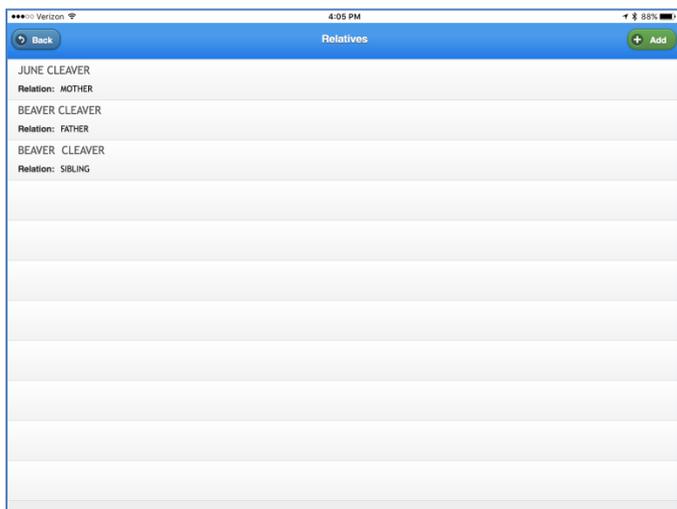
Listing of all relatives entered under the Relationship tab. You can also add new relatives.



- New or additional relatives can be entered by clicking on the green Add button.



- Enter relative information.
- Clicking on Relation will bring up a list of available options to select from.
- Clicking on Deceased will bring up a Yes or No option.
- When finished entering relative data, click the green Add button at the bottom of the screen.

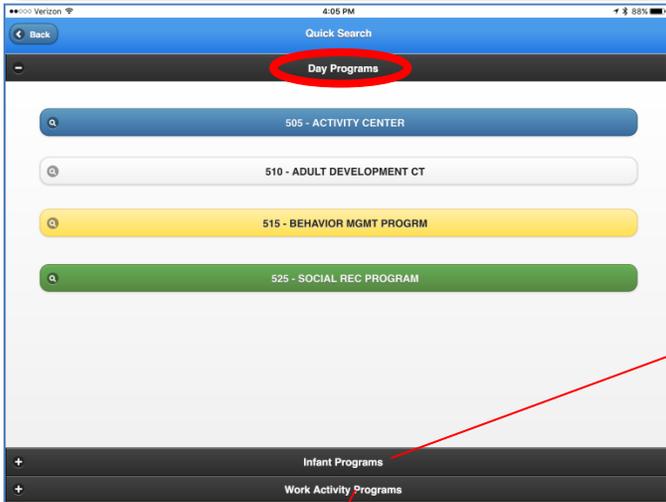


- New relative will display on the list.
- Information can be updated for existing relatives by simply clicking on their name.
- When done adding or updating relative data, click the blue back button.

# Quick Search tab

## What is Quick Search?

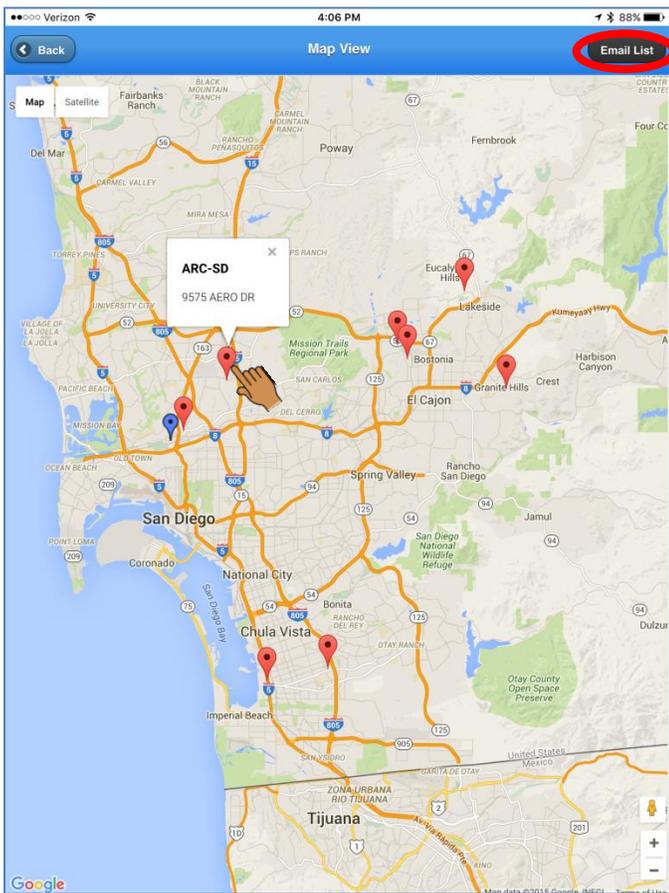
Several headers with a list of services and their respective service codes will appear. Selecting a particular service will bring up a list of providers within a 20 mile radius of the clients home. A list with the vendor name, address, phone number, and distance from the client's home will generate. You have a mapping ability as well as an email option.



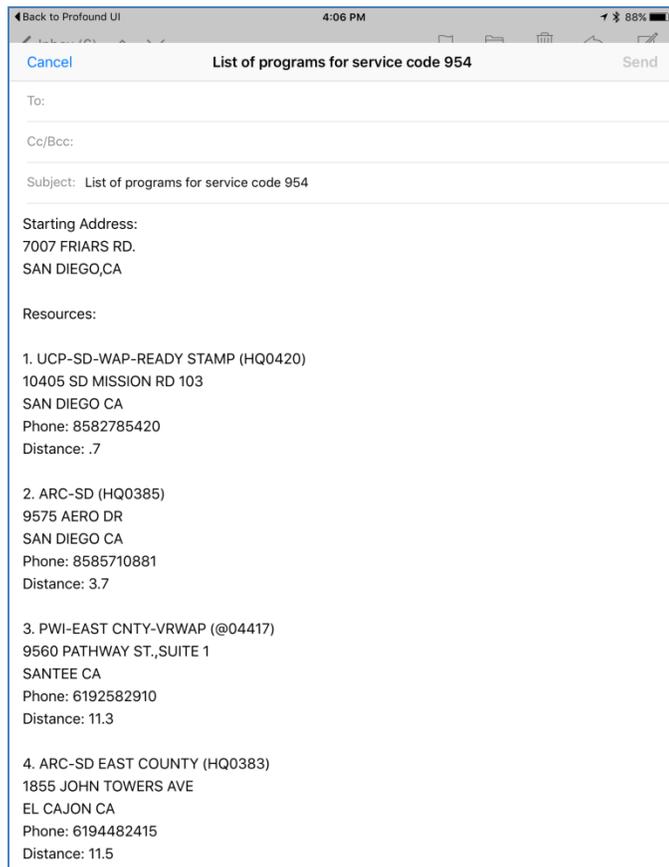
- Currently the headers are Day Programs, Infant Programs, and Work Activity Programs.
- Under each header are different services and their service codes.
- For this example, we are selecting the header Work Activity Program, and taking the Work Activity Program (954).



- Clicking on Work Activity Program (954) brings up a list of the vendors for this service within a 20 mile radius of the clients home address.
- On the left is the vendor name and address.
- To the right is the distance from the client's home.
- You can swipe up and down to see additional vendors.
- On the top right hand side of the screen is a Map View button.



- This will bring up a map view that allows you to see the proximity vendors to the client address.
- The blue pin is the client's home.
- The red pins are the vendors.
- You can click on the red pins to see the vendor name and address.
- On the top right hand side of the screen is a Email List button.

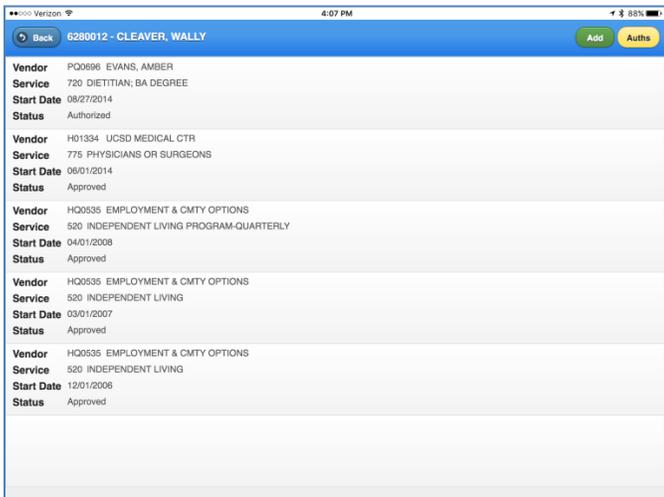


- This will bring up the list of vendors in an email. You can address the email to yourself, the client, parent, or any pertinent party.
- The starting point is the client address.
- Listed are the vendors with vendor name, address, phone number, and distance from client's address.
- The vendors are listed in the ascending order of proximity to client's home address.
- Modifications such as deleting a vendor can also be made prior to sending.
- Once you are done with this feature, click back to the Profound UI app.
- This will take you back to the map view which is where you left off. Click the back button to back out of Quick Search.

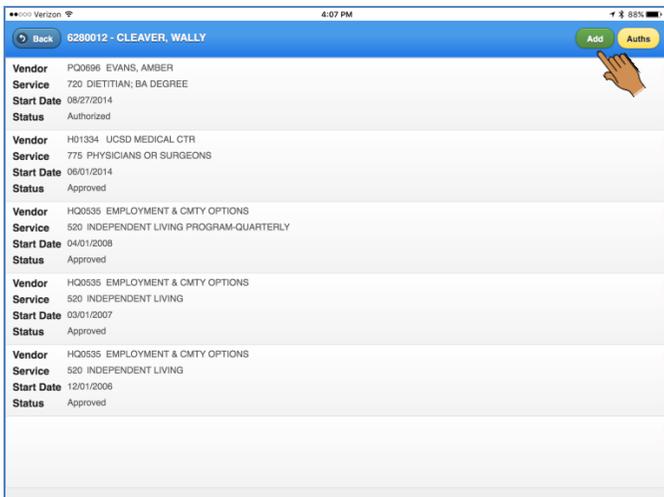
# Purchase of Service tab

## What is under the Purchase of Service tab?

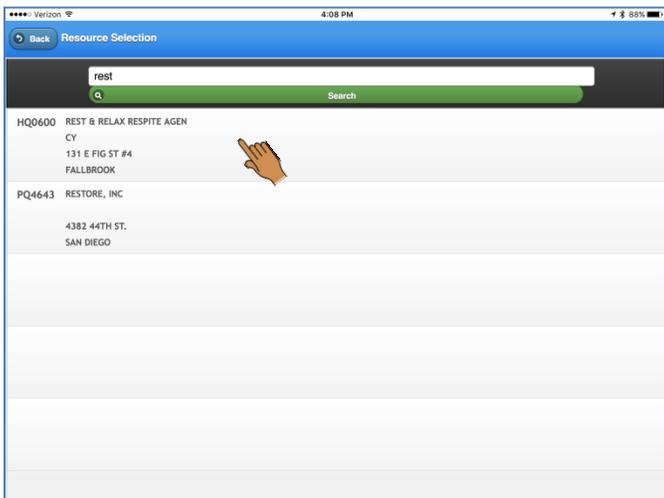
The last five Purchase of Service (POS) entries display. New POS's can be entered and submitted. Current Authorizations can be viewed, changed, cancelled, and submitted.



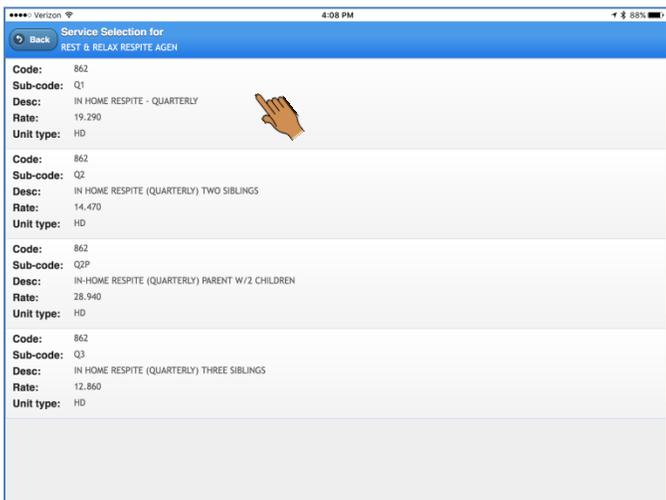
- The last 5 POS entries display.



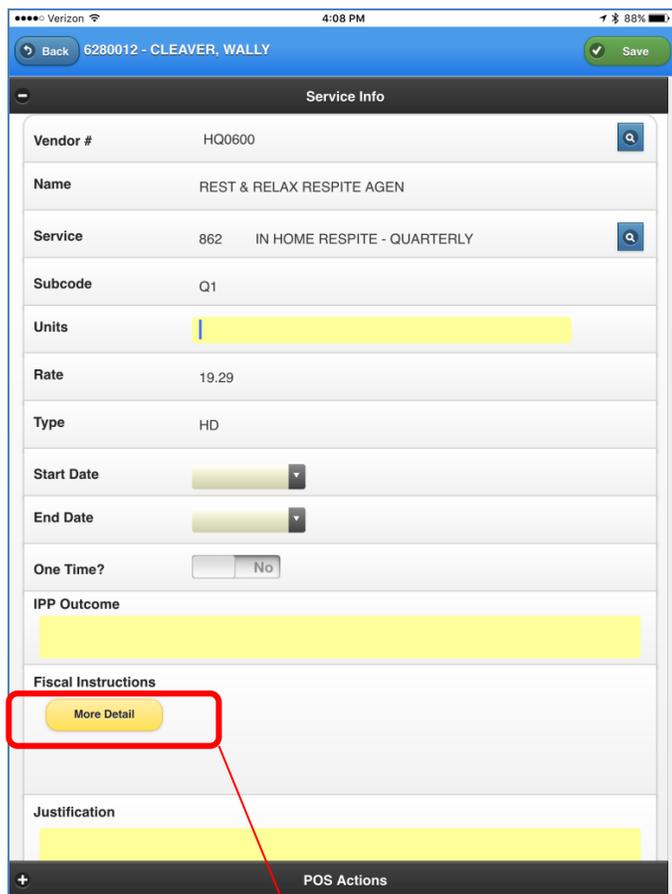
- To enter a new POS, click on the green Add button.



- Enter vendor name or partial vendor name and click Search.
- A list of the vendors will display. Click on the desired vendor.



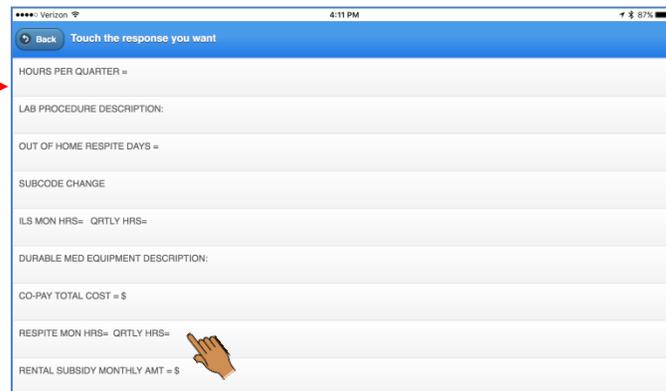
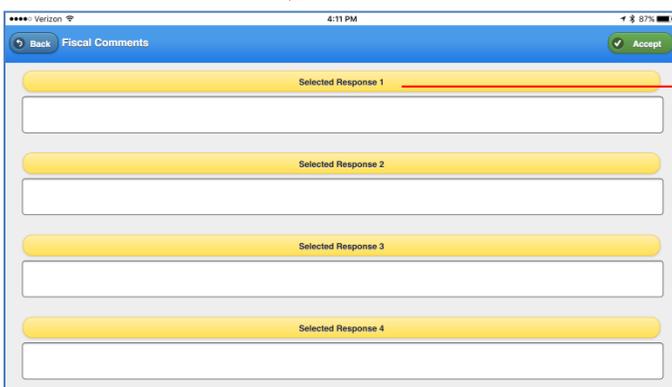
- The rate table will display. Click on the appropriate service/sub-code.
- This will initiate a new POS.



- Fill in the remaining fields in yellow highlights.
  - Units
  - Start Date
  - End Date
  - One Time (Yes/No)
  - IPP Outcome
  - Fiscal Instructions
  - Justification
  - Roll Over? (Yes/No)
  - Supporting ID Note? (Yes/No)
  - Replaces service? (Yes/No)

- Fiscal Comment: Clicking on More Detail will bring up a new page with four fields.

- Each field contains the pre-formatted fiscal comments.



Verizon 4:12 PM 87%

Back Fiscal Comments Accept

Selected Response 1  
RESPITE MON HRS=10 QRTLY HRS=30

Selected Response 2

Selected Response 3

Selected Response 4

- The preformatted comment is pulled and the text can be edited if needed.
- Once all necessary entries are complete, click the green Accept button.

Verizon LTE 4:12 PM 94%

Back 6280012 - CLEAVER, WALLY Save

Service Info

Fiscal Instructions RESPITE MON HRS=10 QRTLY HRS=30  
More Detail

Justification  
PLANNING TEAM HAS AGREED THAT SOUTHBAY RESPITE WILL BEST PROVIDE CARE FOR WALLY WHILE IN HIS HOME.

Roll Over?  Yes

Supporting ID Note?  Yes

Replaces service?  No

Payee 1 REGIONAL CENTER

SSI 950.00

SSA 200.00

V.A.

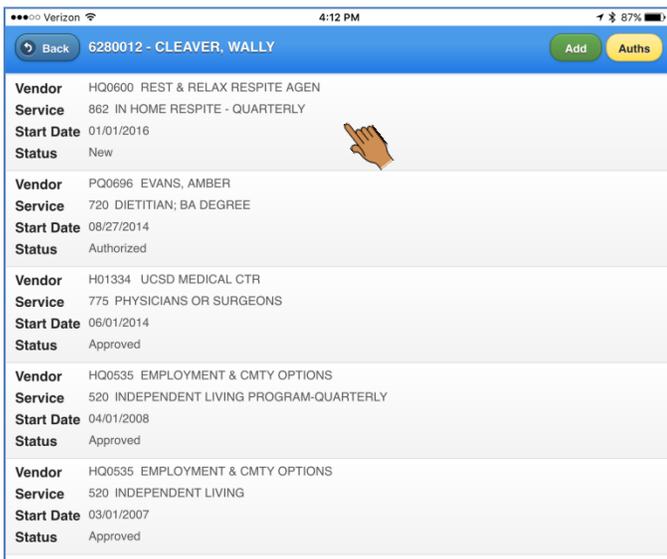
IHSS?  No

IHSS Hours

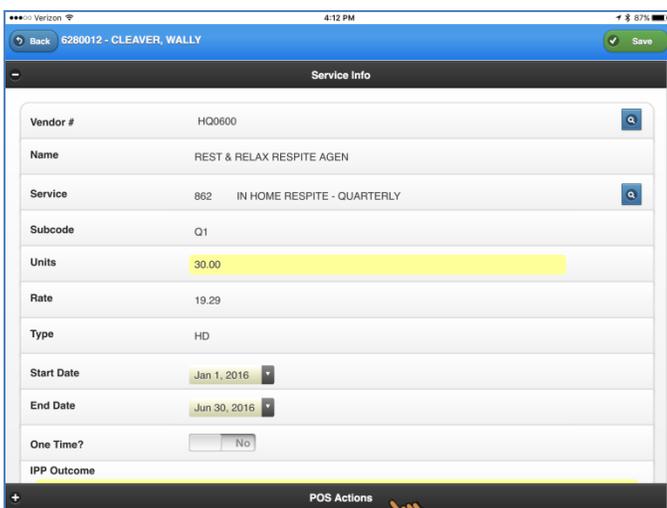
IHSS Provider

POS Actions

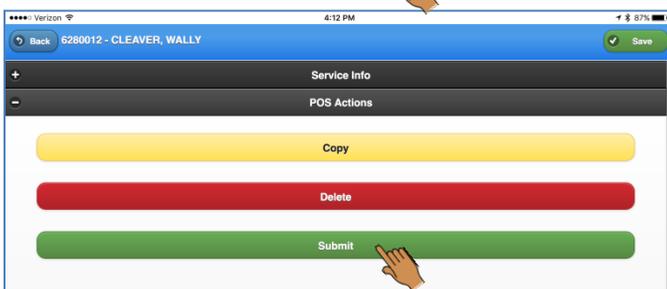
- Towards the bottom of the POS screen, fiscal information is pulled from the Financial tab of the Primary Consumer Record.
- Fiscal data can be manipulated.  
*\*Note: updates made to fiscal data will only update for the purpose of the POS. It will not update the Financial tab fields.*
- When all data entry is complete, click the green Save button on the top right hand corner.



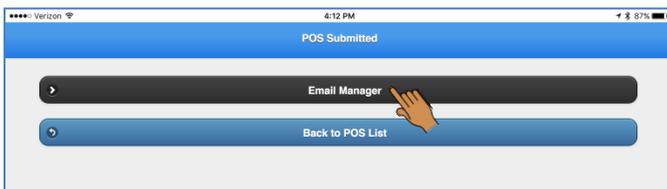
- The new POS entry displays.  
*\*Notice the status is New.*
- To submit the POS, click back into the POS.



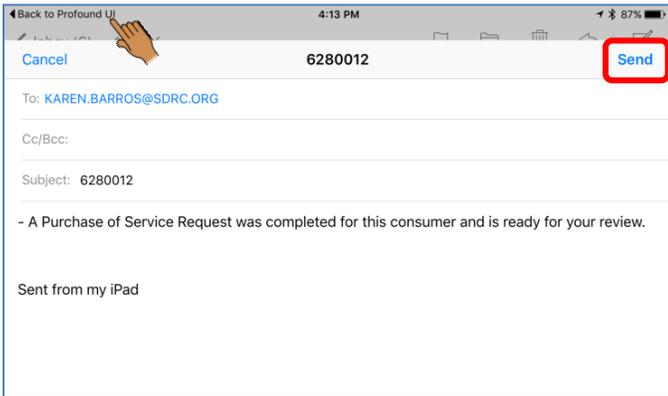
- Click the POS Actions button at the bottom of the screen.



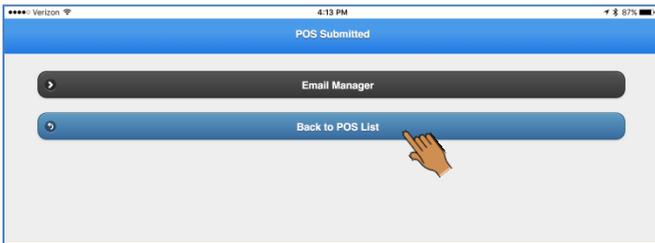
- You have the options to Copy, Delete, or Submit.
- Click on Submit.



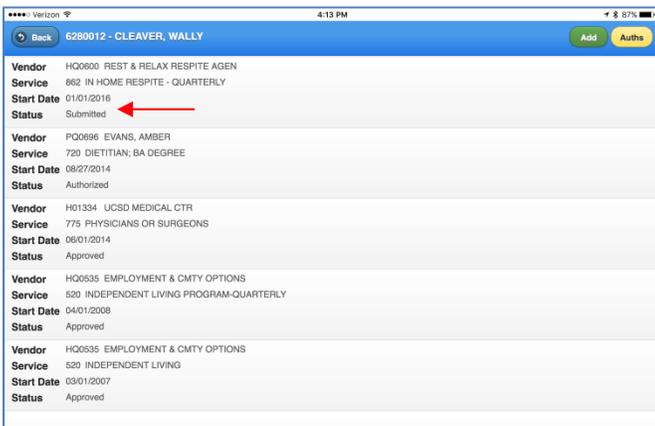
- Click on Email Manager



- An automated email will appear. You can edit and/or send as is.
- When done with submitting the email, click back into the Profound UI app.



- Click on Back to POS List.



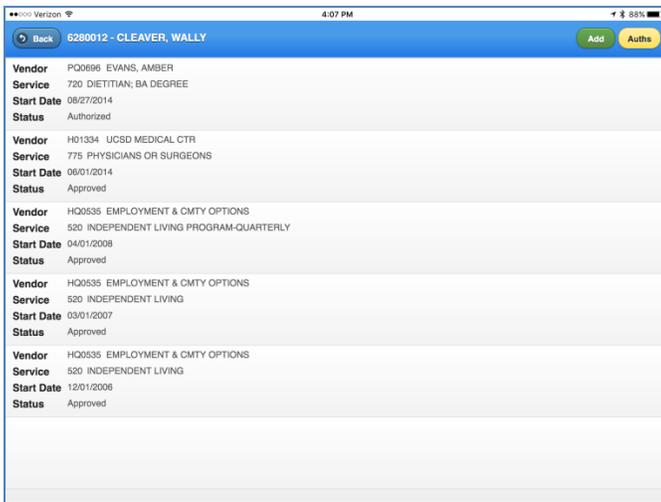
- The status of the POS is now, 'Submitted.'
- To exit out of POS, click the Back button on the top left corner.

### Additional POS Features

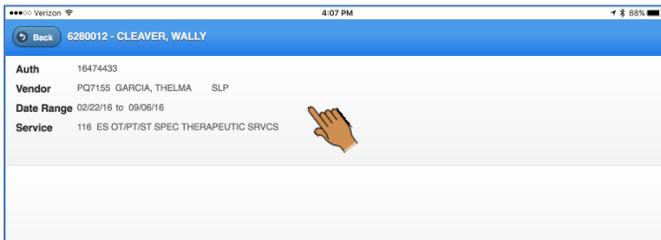
Delete: POS's in New status, can be deleted by clicking into the POS, POS Actions, and selecting Delete.  
 Copy: You can copy and an old POS by click into the POS, POS Actions, selecting Copy.

# Current Authorizations

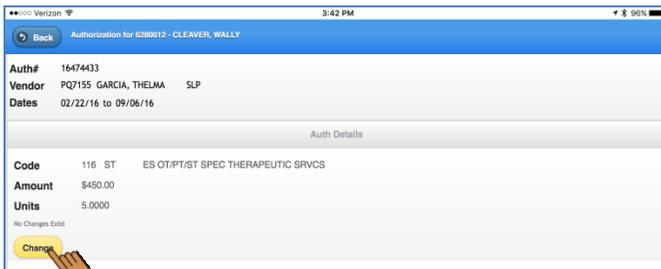
Current authorizations can be viewed. Authorization changes and cancellations can also be made and submitted.



- To view or make changes to a Current Authorizations, at the POS list screen, click the yellow Auths button on the top right hand corner.



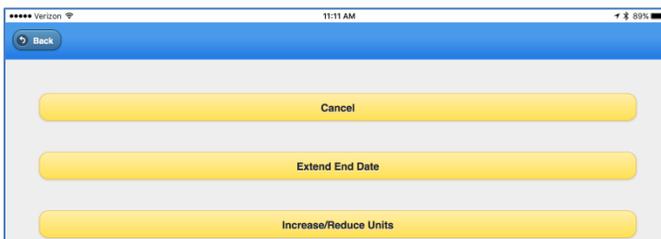
- Current authorizations display.
- To see additional details or to make changes, click on an authorization.



- Once reviewing is complete, click the back button to exit.

**OR**

- To make an authorization change, tap the yellow change button.



- Three options will appear. Select the appropriate one:
  - Cancel
  - Extend End Date
  - Increase/Reduce Units

The next page will demonstrate how each option will only present the fields associated with each request.

## Cancel

Authorization Change

Auth # 16474433

Vendor PQ7155

Service/Sub Code 116 ST

Effective Date

Comments

Dependent on POS?  No

POS Review Date

Status

Manager Approval

Save

Actions

## Canceling an Authorization:

- Available fields to fill out:
  - Effective Date: ##/##/#### (END DATE)
  - Comments: Enter comments for Fiscal or Manager
  - Dependent on POS? [Yes/No]
  - POS Review Date (enter if applicable)
  - Green Save button (top, right corner)

## Extend End Date

Authorization Change

Auth # 16474433

Vendor PQ7155

Service/Sub Code 116 ST

Effective Date

Comments

Dependent on POS?  No

POS Review Date

Status

Manager Approval

Save

Actions

## Extending the End Date

- Available fields to fill out:
  - Effective Date: ##/##/#### (NEW END DATE)
  - Comments: Enter comments for Fiscal or Manager
  - Dependent on POS? [Yes/No]
  - POS Review Date (enter if applicable)
  - Green Save button (top, right corner)

## Increase/Reduce Units

Authorization Change

Auth # 16474433

Vendor PQ7155

Service/Sub Code 116 ST

Reduce or Increase?

From 5.00

To

Effective Date

Comments

Dependent on POS?  No

POS Review Date

Status

Manager Approval

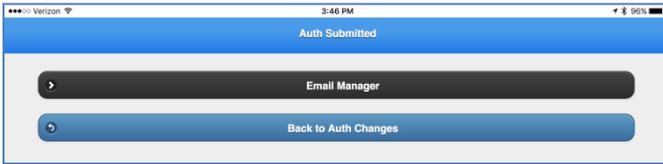
Save

Actions

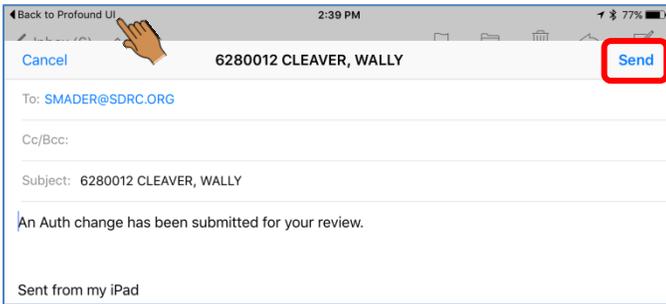
## Increase/Reduce Units

- Available fields to fill out:
  - Reduce or Increase? [Reduce or Increase]
  - To: ## (Enter the new number of units)
  - Effective Date: ##/##/####
  - \*Date the new number of units should take place\*
  - Comments: Enter comments for Fiscal or Manager
  - Dependent on POS? [Yes/No]
  - POS Review Date (enter if applicable)
  - Green Save button (top, right corner)

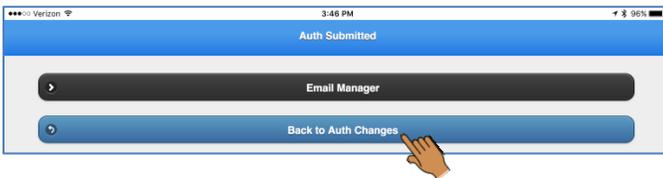
After you have enter the selected change, when clicking the green SAVE button, the following actions will proceed.



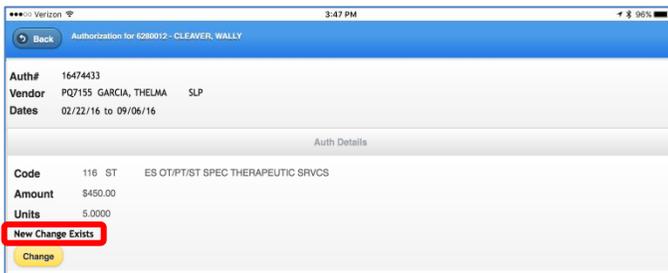
- Click on Email Manager



- An automated email will appear. You can edit or send as is.
- When done with submitting the email, click back into the Profound UI app.



- Click on Back to Auth Changes.



- The status of the Auth is now, 'New Change Exists.'
- Click the Back button on the top left corner.

# CDER tab

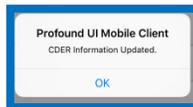
## What is under the CDER tab?

The CDER report date, height & weight, date weighed can be updated.

Diagnosis' can be viewed. Supplemental fields can be revised, as well as the Evaluation Elements.

### CDER

Report Date: Dec 15, 2015  
CDER Expiration: 02/03/2018  
Height in inches: 70  
Weight: 225  
Weighed (MM/YY): 12/15  
Program:  
Section:  
Update



- When clicking on CDER, the default tab is the CDER Info.
- The Report Date, Height, Weight, and Date Weighed can be updated.
- Once all updates are made, click the green Update Button.

CDER Actions

- Diagnostics
- Supplemental Information
- Evaluation Elements

- A pop-up will appear confirming your updates were made.

MR INTELLECTUAL DISABILITY  
MILD INTELLECTUAL DISABILITY

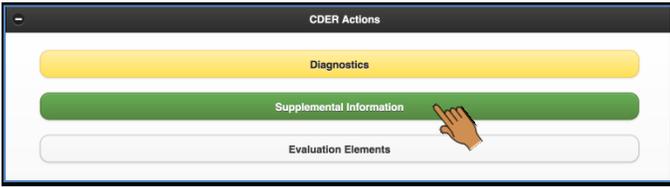
- Under CDER Actions are:
  - Diagnostics
  - Supplemental Information
  - Evaluation Elements

MR - INTELLECTUAL DISABILITY

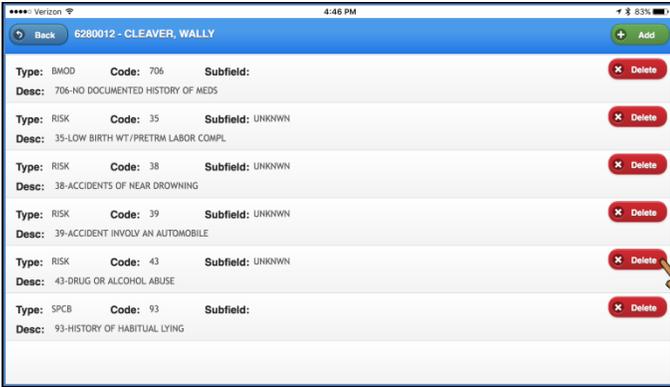
Etiology 1	E220	ACROMEGALY AND PITUITARY GIGANTISM
Etiology 2	N/A	N/A
Evaluation Date	10/84	
ICD	F70	MILD INTELLECTUAL DISABILITY
Intelligence Quotient		
Intelligence Test		
Adaptive Behavior Rating		
Last Updated	06/03/2015	

- Clicking on Diagnosis will bring up a view only list of diagnosis.
- To view additional details click on a diagnosis.

- When done viewing, click the blue Back button to exit out to CDER Actions.



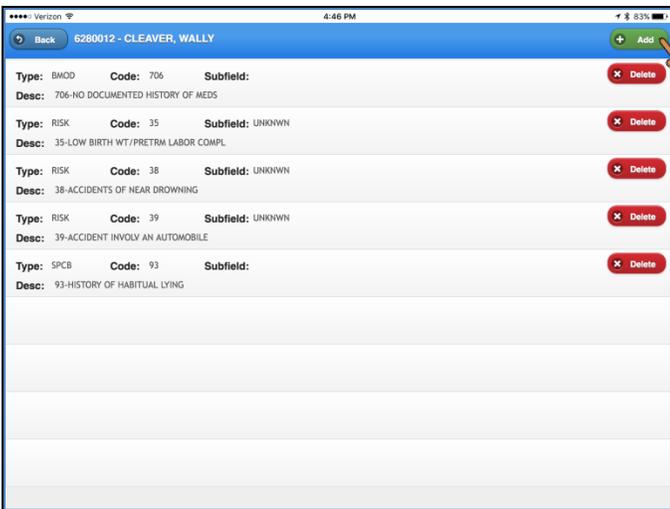
- Supplemental Information will allow revisions of the data. Items can be deleted or added.
- Click on Supplemental Information.



- Existing supplemental entries will appear.
- To delete any of the entries, click on the red Delete button next to the entry to be removed.



- A pop-up will appear confirming your deletion.

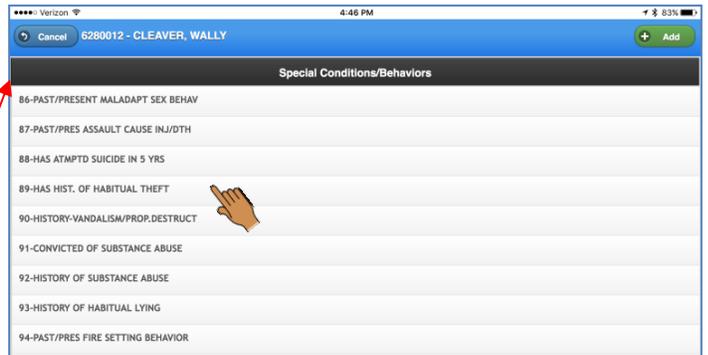
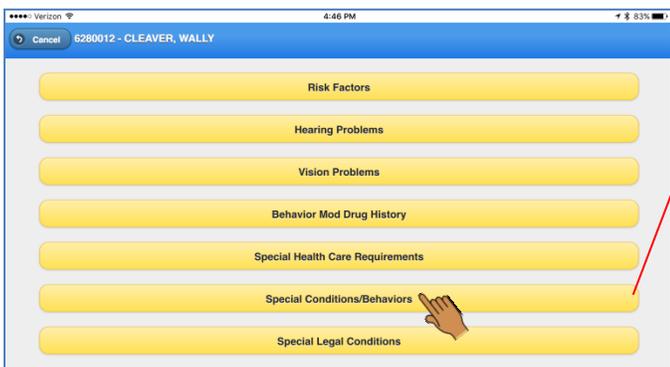


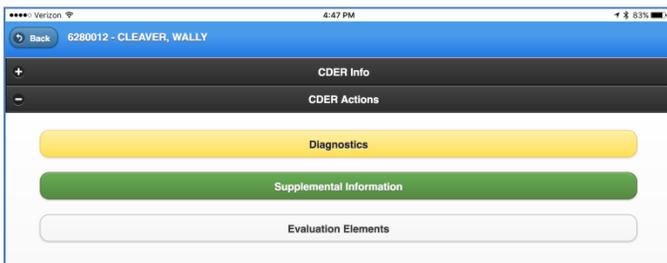
- To add a Supplemental entry, click the green Add button.

- A list of headings will display.
- Selections will appear within each heading.
- Click the appropriate condition.

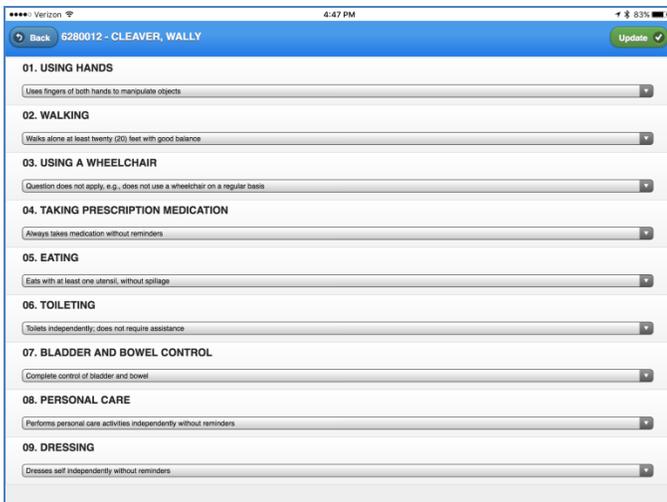
- You can repeat with additional Supplemental items.

- Once you are done, click the blue Back button.

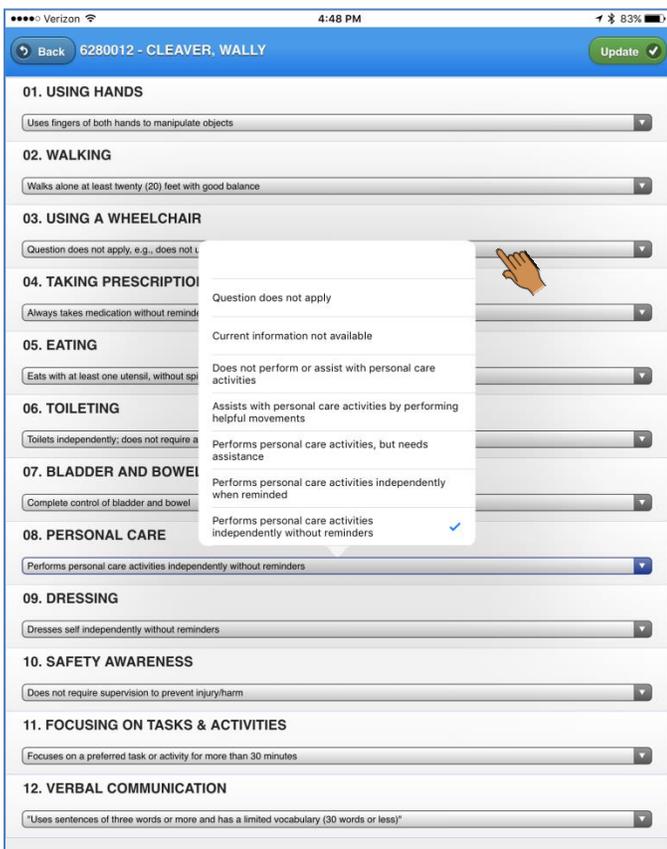
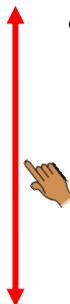




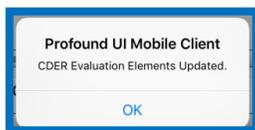
- The Evaluation Elements tab contains all three questionnaires:
  - Evaluations Elements
  - Personal Outcomes Area
  - Consumer Survey



- All three questionnaires appear continuously.
- You can swipe up and down to navigate the questions.



- To update answers, simply click on the answer and answer options will appear.
- Click on the appropriate answer.
- Repeat the above steps to update all questions needing revision.
- When all questions needing revisions have been updated, click the green Update button.



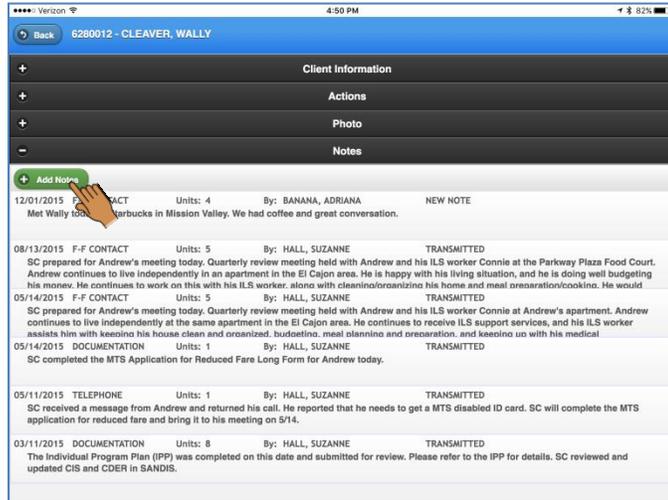
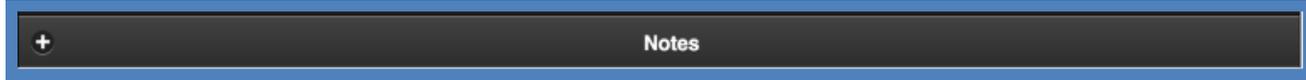
- A pop-up will appear confirming your updates.
- Click the blue Back button to exit the CDER.

# Notes tab

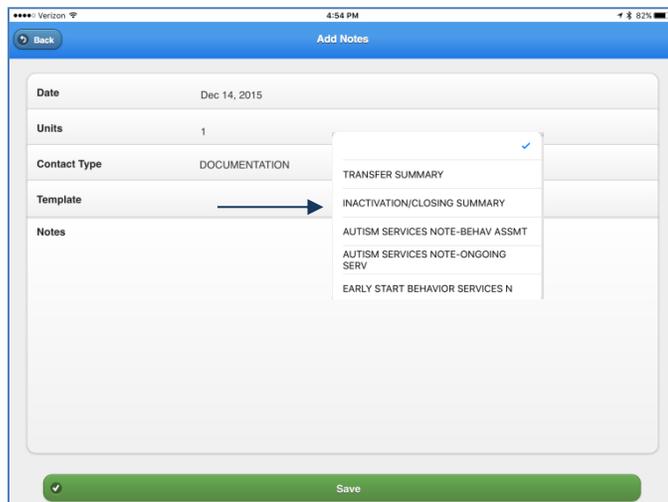
## What is under the Notes tab?

The 10 most current T19 note entries appear here.

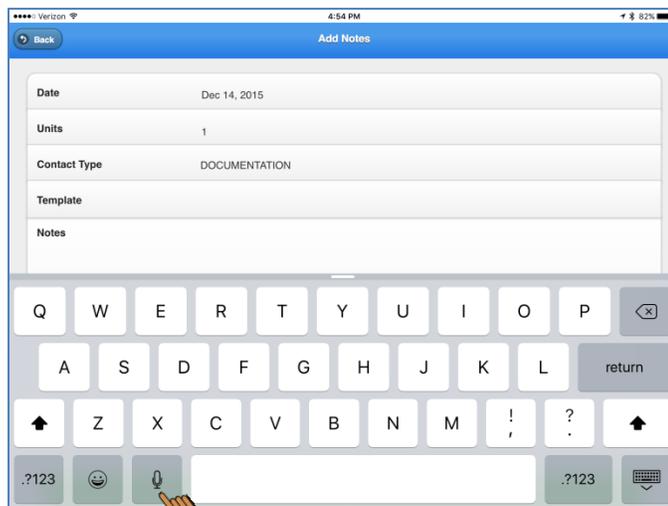
Notes in NEW status can be edited or deleted, and new notes can be entered.



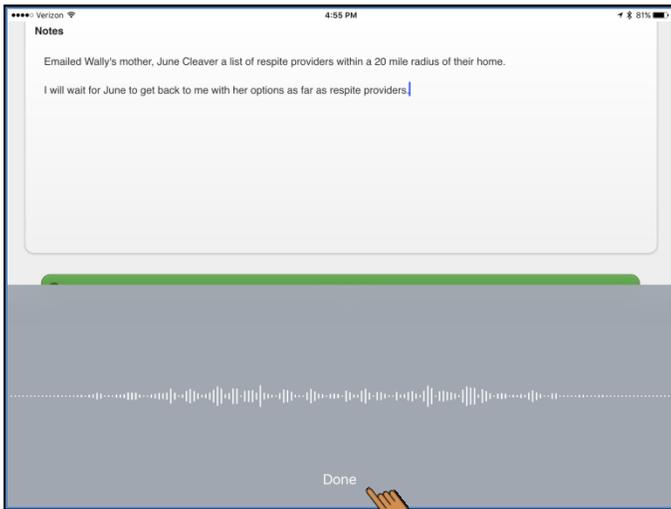
- To add a new note, click on the green Add Notes button.



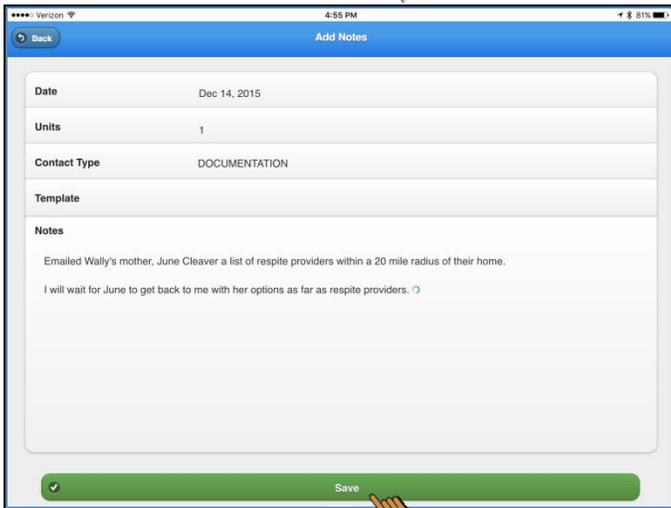
- Date defaults to today's date but can be modified.
- Enter number of Units and select Contact Type.
- \*Note if you select Documentation, you can also select a Template. The template options will appear.



- Notes can be entered by clicking inside of Notes and begin typing.
- To dictate notes, activate your virtual keyboard. This is typically done by simultaneously clicking the function button on your Bluetooth keyboard and the number button containing a picture of a keyboard (likely number 2 or 5).
- When your virtual keyboard appears, click the microphone button on the bottom left.
- This will enable the dictation feature. Start dictating your note.



- You can use commands such as period, comma, exclamation mark, question mark, new paragraph, etc.
- When done dictating, click the Done button at the bottom of the screen.



- Deactivate your virtual keyboard by using the same function used to active. Simultaneously clicking the function button on your Bluetooth keyboard and the number button containing a picture of a keyboard (likely number 2 or 5).
- Click the green Save button to save the note.
- Click the blue Back button to exit out of Notes.

# Changing Caseloads

You can change caseloads by entering a new caseload code. If you are covering someone in your unit, you will have the same update rights as you do on your own caseload. If you pull up a caseload outside of your unit, you will have view only rights to everything. The only area you will have update rights will be the T19 notes.

Name	Status	Age
BULLWINKLE, ROCKY	2	32
CLEAVER, WALLY	2	32
FUDD, ELMER	2	13
HUXTABLE, RUDY	2	13
MERTZ, ETHEL	1	5
MUNSTER, EDDIE	2	34
NOODLE, UDON	2	26
ROADRUNNER, WILEY	2	16

- To change caseloads, click on the current caseload code on the top left corner.

Case Load

DBO

Change Case Load

On Call Search

Last Name: Enter Search Criteria

First Name: Enter Search Criteria

UCI#: Enter Search Criteria

Search

- Replace the Case Load code with the NEW caseload you would like to access, click the green Change Case Load button.

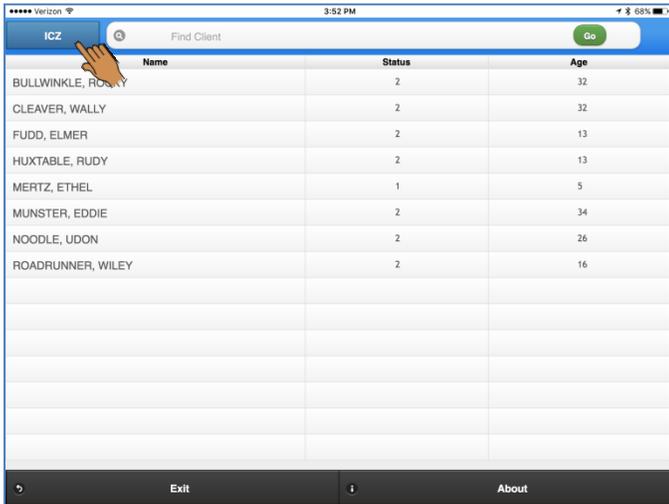
Name	Status	Age
JOLIE, ANGIE	2	36
PRINGLE, PEPE	2	3
ROCK, KID	2	5
ROGERS, BUCK	1	2
SANDIS, SANDY	2	3

- The new caseload will appear.

# On Call Search

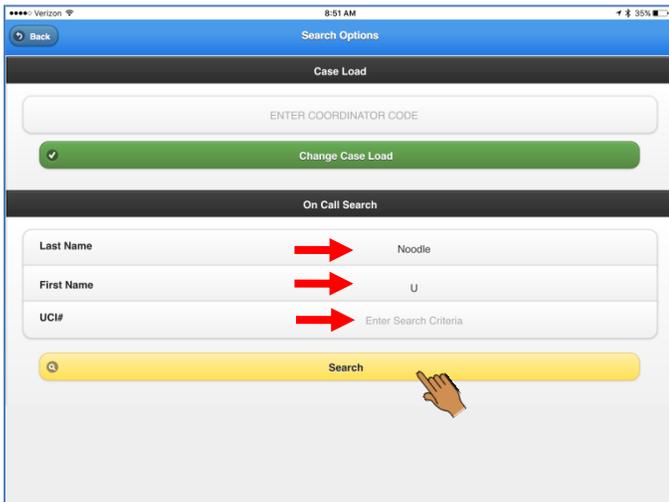
## What is the On Call Search feature?

You can look up clients by name, partial name (first or last), or UCI.



Name	Status	Age
BULLWINKLE, ROXY	2	32
CLEAVER, WALLY	2	32
FUDD, ELMER	2	13
HUXTABLE, RUDY	2	13
MERTZ, ETHEL	1	5
MUNSTER, EDDIE	2	34
NOODLE, UDON	2	26
ROADRUNNER, WILEY	2	16

- Click on the current caseload code on the top left corner.



Case Load

ENTER COORDINATOR CODE

Change Case Load

On Call Search

Last Name: Noodle

First Name: U

UCI#: Enter Search Criteria

Search

- Under the On Call Search, enter name, partial name, or UCI. Then tap the yellow Search button.



Name	Status	Age
NOODLE, UDON	2	26
NOODLE, URIAH	2	1

- Results will display. Select the correct client.