Understanding Client Pending Status

When clients (members) are transmitted on feeds into EVV, Sandata defaults the client to a status of PENDING. When you are ready to schedule visits for the Client, the Status must be changed to ACTIVE. If an updated is sent via the Client feed, a Client in ACTIVE Status will be returned to PENDING Status to notify the agency that an update has been made for your review.

Checking a Client Status: Start in the Client section and search for the Client. When your Search results are presented, you will see either a yellow dot (PENDING) or a green dot (ACTIVE) in the Status section of your Search results.

Activating a Client: Start in the Client section and search for the Client. At the left-hand side of the Client record, an indicator tells you whether the client is ACTIVE (green) or PENDING (Yellow). Click the pencil icon to edit/review the Client record. Review the Personal and Program tabs for changes. Click on the Program Tab and select the drop-down box in the Client Status field. Select 02-Active. Select to Save and Close the record. Your client is now ACTIVE.

If you would like additional training on how to change client status, you can access the Reactivating a Client video found in the Client Maintenance section of the Video Library. Follow this process to change the Status from PENDING to ACTIVE. The Video Library can be found by accessing this link:

https://sandata.wistia.com/projects/6xq18t4y4o

For assistance with Activating a Client, please reach out to Sandata support at AZCustomerCare@sandata.com or by calling 855-928-1140. Thank you.