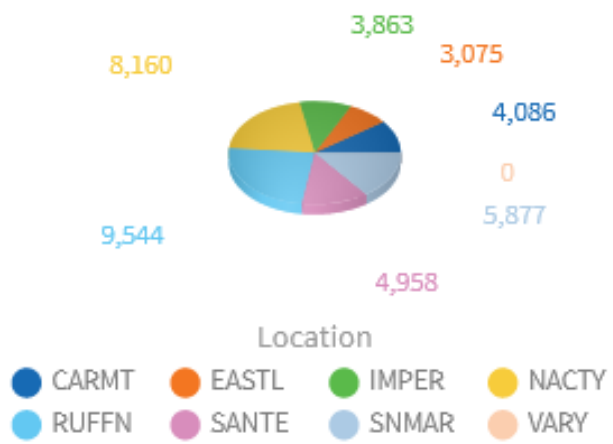


**Caseloads**



# SANDIS NEWSLETTER

**PEOPLE WHO LISTEN.  
SOLUTIONS THAT WORK.**

## WHAT'S NEW IN SANDIS?

From dynamic new dashboards to expressive avatars, SANDIS 8.1 is a comprehensive upgrade that embraces user experience and productivity.



# MEET THE TEAM

**ARTURO ERIQUEZ**

Application Analyst

**CHRISTO ROSE**

Application Analyst

**MAURA MENDEZ**

Application Analyst

**MELISSA DIMDIMAN**

Application Analyst

**NIKKO ALMASCO**

Application Analyst

**SHERYL TESTADO**

Billing Integrity Specialist

**ADRIANA RIVAS**

Manager, Application Support

**NANCY LORCH**

Manager, Software Development

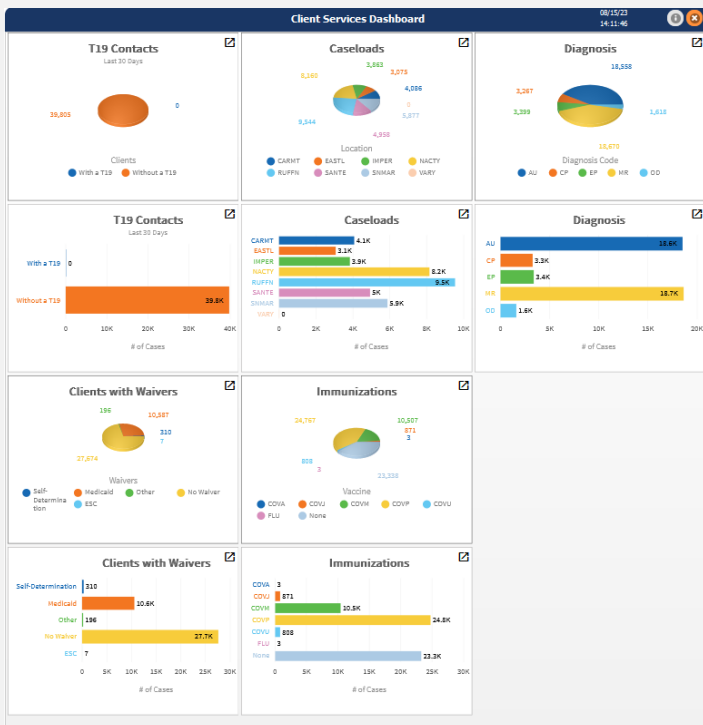
**SETH MADER**

Chief Information Officer

SANDIS 8.1 | [Watch Video](#)

# KEY FEATURES

With a robust array of new features, this release brings an unmatched blend of improved user experience, streamlined client data access, and heightened productivity tools.



## → Client Services Dashboards

Users can dive deeper into client data and gain actionable insights with the addition of four new dashboards: Caseload Overview, Waivers, Qualifying Diagnoses, and Immunizations

The SANDIS - Clients Caseload by Name screen displays a detailed list of clients and their associated data:

Cases: 78	Position by Last Name	Name	D.O.B.	Age	Y/M	UCI#	Status	T19	Waiver	IPP
			10/15/66	56	Y		#2-ACTIVE	N	N	Next Month
			11/29/91	31	Y		#2-ACTIVE	Y	N	This Month
			6/23/85	38	Y		#2-ACTIVE	Y	Y	>Last Month
			9/17/85	37	Y		#2-ACTIVE	Y	N	Last Month
			3/04/70	53	Y		#2-ACTIVE	N	N	Current
			10/17/62	60	Y		#2-ACTIVE	Y	Y	Current
			8/09/97	26	Y		#2-ACTIVE	N	N	Current
			5/27/49	74	Y		#2-ACTIVE	N	N	Current
			5/14/67	56	Y		#2-ACTIVE	Y	Y	Current

Summary Reports:

IPPs in Process	SIRS > 24 Hrs	CDER > 30 Days	POS	T19 By Others
Previous Month: 12	Overdue: 0	Overdue: 13	In Process: 2	New: 0
Last Month: 3				
Are Current: 56				
Due Today: 0				
Due This Month: 3				
Due Next Month: 4				
With No IPP: 0				

## → SC Welcome Screen - IPP Due

We're introducing a dynamic enhancement that brings greater clarity and organization to the Service Coordinator's workflows – the new color coding for the IPP column. With this feature, users will experience a visually intuitive way to manage tasks and prioritize actions effectively.

SANDIS - Management  
Program Managers

Welcome!

Prog Mgr: SDU

Position By Last Name UCI Number

Staff Code	Staff Name	# of Clients	Schedule	Day Off	Next Review	Hire Date
SDA	SANDIS, SANDIS	78	4/40; 7-5:30PM NO R	F	09/17/2023	08/17/2023
SDB	SANDIS, SANDERS	79	4/40; 7-5:30 R:M&TH	F	11/16/2023	08/01/2023
SDC	VACANT	72				
SDD		76	4/40;7-5:30 R:M&TH	F	10/26/2023	10/26/2020
SDE		69	4/40; 7-5:30PM NO R	F	04/03/2023	
SDF		81	9/80; 7-4:30 NO R	F	10/04/2023	04/04/2022
SDG		70	4/40 7-5:30PM NOR	M	09/09/2023	03/13/2023
SDH		76	4/40 7-5:30 R:T & TH	M	10/31/2023	10/31/2022
SDI		75	4/40; 7-5:30 NO R	F	12/08/2023	12/08/2014

Export to Excel

## PM Welcome Screen - New Service Coordinators (SC)

Incorporating the Hire Date from the PM's Welcome Screen, the names of newly onboarded SCs - those brought on within the past 60 days - will now be displayed in a distinctive shade of blue. This enhancement will be visible across various sections, including the Client Search by Name, PM Welcome Screen, and Main Client Page within the SANDIS software.

T19 Notes

Client # TEST SANDY SANDIS

Contact Date 08/16/2023

Units 1

Contact Type

Template

Reviewed by on

Recorded by ALMASCO, NIKKO on 08/16/2023

Spell Check

Spell Check In Progress

Spell Check requested. Complete the spell check before continuing. This window will close once spell check completes. If window does not close automatically then Click Here.

Small Font Medium F... Large F...

Save Spell Check

## Spell Check Text Protector

A message will now appear when using the SANDIS Spell Check program to prevent staff from typing text in the narrative area while spell check is active. (Any text added while spell check was in progress was previously lost).

SANDIS Client IPP System  
Individual Program Plans

Client # TEST SANDY SANDIS

Date of Birth 08/16/2023

Status

Srv Crd

Waiver N

Work With PDFs

ERROR MESSAGE

New IPP not allowed, previous IPP is not locked

SANDIS - Clients  
Document Distribution

Client # TEST SANDIS, SANDY A

Resource# (Optional)

Name

Address 2500 PRIST ST.

City SANTEE State CA

Zip Code 92071 Phone: 0

Relation CLIENT MAIL

Email Address SANDIS.SANDY@TEST.COM

(Changes to Address Information here do not update the client or resource records.)

## IPP Program

A program update restricts staff from generating a new IPP or IPP Addendum if there's an existing document not in Locked status. Additionally, client/family email address is now integrated into the Distribution list.

SANDIS  
Work with One Note To Many  
Showing All Posted Batches

Date Range: From [ ] To [ ]

Go

Posted Batches Back-out Batches Backed-out History

Status	UserId	Batch Type	Created Date	Last Date	Closed Date	File Name
P	SDDBN7	RSCONENOTE	2021-12-28-05:21:57.454513	2021-12-28-05:22:31.681809	2021-12-28-05:23:12.366754	
P	SDDB1	T19DICTATE	2022-01-05-11:21:32.422367	2022-01-05-11:21:32.742162	2022-01-05-11:24:47.991852	
P	SDDBL7	T19DICTATE	2022-01-05-11:39:21.432232	2022-01-05-11:52:29.505050	2022-01-05-11:54:22.359738	
P	SDDBI7	T19DICTATE	2022-01-11-08:58:56.287965	2022-01-11-08:59:47.387861	2022-01-11-09:00:50.155311	
P	SDDBI7	RSCONENOTE	2022-01-13-07:20:46.309873	2022-01-13-07:28:45.399986	2022-01-13-07:34:02.202456	
P	SDRS7	T19DICTATE	2022-01-13-17:52:35.865526	2022-01-13-17:52:35.923271	2022-01-13-17:55:23.933236	
P	SDRS7	T19DICTATE	2022-01-20-13:14:00.606344	2022-01-20-13:14:00.672568	2022-01-20-13:14:26.918778	
P	SDRS7	T19DICTATE	2022-01-20-13:23:13.122992	2022-01-20-13:23:13.172024	2022-01-20-13:23:21.902803	
P	SDRS7	T19DICTATE	2022-01-20-13:30:25.074639	2022-01-20-13:30:25.133392	2022-01-20-13:30:31.522919	
P	SDRS7	T19DICTATE	2022-01-20-13:39:50.522853	2022-01-20-13:39:50.632743	2022-01-20-13:39:54.768757	
P	SDRS7	T19DICTATE	2022-01-20-14:00:01.903382	2022-01-20-14:00:02.063116	2022-01-20-14:00:04.814553	
P	SDRS7	T19DICTATE	2022-01-20-14:02:51.183657	2022-01-20-14:02:51.238391	2022-01-20-14:02:53.951721	
P	SDRS7	T19DICTATE	2022-01-20-14:25:38.302994	2022-01-20-14:25:38.352251	2022-01-20-14:29:02.240198	
P	SDRS7	T19DICTATE	2022-01-20-14:37:26.769920	2022-01-20-14:37:26.849208	2022-01-20-14:37:57.470970	
P	SDRS7	T19DICTATE	2022-01-20-14:57:18.877002	2022-01-20-14:57:18.910740	2022-01-20-14:57:53.440803	

Export to Excel

## ➔ Back Out Note Batch

This tool empowers users to undo note batches executed in error. For T19, notes must be in a NEW status, and for other note types like Resource Notes or Inquiry Progress Notes, they should be created within the past 30 days.

Previous

Client#: TEST SANDY SANDIS

Changed By: SDDBPUI4 On: 08/16/2023 At: 13:20

Address Record Before Changes: **What Changed:**

Contact: SAVANNAH SKINNER **SANDY SANDIS**

Address: 2500 FIRST ST.

City, State: SANTEE CA Zip: 92071

Phone:

Email Address: SANDIS.SANDY@TEST.COM

Legally Responsible:

This address applies to:

Client	Father	Mother	Emergency	Mailing	Bus	Voucher	Other	Mail List
X				X				

Comment

## ➔ Address History

The new Address History page now displays both the previous and updated information side by side.

Previous Continue Save

SANDIS Clients Client Contacts

Maintain Contacts

Client TEST SANDY A SANDIS

Birthdate 02/04/2019

Type of Contact: EMERGENCY CONTACT  Use for Everbridge  Use for ESC Survey

Personal Information **Update Information**

Relative Name: SUNNY SANDIS

Relationship: MOTHER

Primary Language: ENGLISH

Legal Guardian: N Resides with Client: N

Work Phone: Ext:

Cell Phone: 0 Carrier:

Email:

Preferred Method of Notification:

Address **Update Address**

Contact Name: TEST 1

Address: 9449 BALBOA AVE # 3

City: SAN DIEGO, CA 92123-4335

Phone#:

This address applies to: Dad

Comment:

## ➔ Everbridge Flag | Watch Video

When setting up an emergency contact, a new checkbox is provided to indicate whether the emergency contact information should be uploaded to Everbridge. This enhancement enables staff to designate any individual or family member as an emergency contact while specifying their inclusion in Everbridge.

# ADDITIONAL ENHANCEMENTS

## → Additional Avatar Options

Select from a wider range of avatars than ever before. Explore the new options and make your SANDIS profile uniquely yours!

## → Low/No POS Report

The "Low/No POS Reports" has been updated to incorporate the client's email address from their address record.

## → Open Authorization Report

This query is the first to be converted to an SQL grid. Options for selecting records are easy to use, and the results of the query are produced in a grid. Grid features such as Find, Filter and Sort are built in, as is the ability to export the report to Excel.

## → Open PDF in Browser

PDFs like Face Sheets, CDERs, and Vendor Status Notifications are now accessible for viewing within the browser, allowing easy downloads without the necessity of using email.

## → Record Lock Relief in Inquiry

Similar to messages that appear in the Client pages in SANDIS, if two people try to get to the same Inquiry case screen in update mode, a message will appear letting staff know who's using the record and have the option to continue in view mode.

## → Resource Development Remote Work Report

Similar to the Service Coordinator Remote Work Report, this program can be used by Resource Developers to log work activities done when working remotely.