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.