


Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.
- Your Client's ID.

1.  **Dial the toll-free number assigned to your agency.**

 The Santrax system will say: **“Welcome to Santrax. For English, please press one (1). For Egyptian Arabic, please press two (2). For Burmese, please press three (3). For Chinese Mandarin, please press four (4). For French, please press five (5). For Hindi, please press six (6), For Hmong, please press seven (7), For Laotian, please press eight (8), For Nepali, please press nine (9), For Russian, please press ten (10), For Serbian, please press eleven (11), For Somali, please press twelve (12), For Spanish, please press thirteen (13), For Swahili, please press fourteen (14), For Vietnamese, please press fifteen (15).”**

Each language's prompt is in that language.


2.  **Press the number that corresponds to the language you wish to hear.**


The rest of the call will be in the chosen language.


 Santrax will say: **“Please enter your Santrax ID.”**


3.  **Press the numbers of your Santrax ID on the touch tone phone.**

 Santrax will say: **“Is this a group visit? Press one (1) for Yes or two (2) for No.”**

4.  **Press two (2) for No.**


 Santrax will say: **“Please choose your location of service. Press one (1) for Home, press two (2) for Community, press three (3) for replay”.**


5.  **Press one (1) to select home or two (2) to select community, Press three (3) for replay.**

 Santrax will say: **“If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue.”**

If this is an FVV Call, press the star (*) key and refer to the FVV Call Reference Guide for detailed instructions for the FVV call process.

6.  **Press the pound (#) key to continue.**

 Santrax will say: **“Please select one (1) to call in or two (2) to call out.”**

7.  **Press the one (1) key to “Call In”.**

 Santrax will say: **“Received at (TIME). Thank you, bye.”**


8.  **Hang up.**


Calling Out: When completing services, make sure you have the following information:


- Your Santrax ID.
- The Service ID & Task ID, if required.
- The Client is available to verify the visit, if required


9. **Follow steps 1 through 6 and then continue.**

 Santrax will say: **“Please select one (1) to call in or two (2) to call out.”**


10.  **Press two (2) to “Call Out.”**

 Santrax will say: **“Received at (TIME). Please enter the Service ID.”**

11.  **Press the Service ID number for the service you performed.**
Refer to your agency's service list.

 Santrax will say: **“You entered (SERVICE). Please press one (1) to accept, two (2) to retry.”**

12.  **Press the one (1) key to accept or press the two (2) keys to retry.**

 Santrax will say: **“Would you like to continue the visit with the new service?”**

13.  **Press one (1) key for Yes or two (2) key for No.**

To continue with a new service	For the final service
Repeat Step 11 and Step 12 for the new service. Continue with Step 14. NOTE: Information entered for Steps 14 to 20 is for the service that was already performed.	Continue to step 14 to complete the visit for the service performed.

- Santrax will say: "Enter number of tasks."
14. Press the total number of tasks performed for the client.
Santrax will say: "Enter task ID."
15. Press the Task ID number for the task you performed.
- NOTES:**
- Refer to your agency's task list to find Task ID numbers. If you performed more than one task, wait for the system to confirm the task, and then enter the next task number until you have entered all tasks performed during the visit.
 - If you are performing a task with a reading, Santrax will pause after receiving the Task ID. During the pause, enter the result of the reading.
 - If you made a mistake entering Tasks, press "00," the system will confirm by saying: "Starting Over, Enter number of tasks." Enter all Task IDs again.
- Santrax will say: (Task Description) You entered (NUMBER) task(s).
To record the client's voice please press one (1) and hand the phone to the client or press two (2) if the client is unable to participate."
16. Press one (1) to record the client's voice.
OR
Press two (2) if the client is unable to participate.
17. Hand the phone to the client. They will be asked to state their name and today's date.
Santrax will say: "Please say your first and last name and today's date."
18. The client should say their first and last name and today's date.
Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press one (1) to confirm, two (2) to deny, three (3) to replay."
19. The client should press the appropriate option.
Santrax will say: "The service performed was (SERVICE). Press one (1) to confirm, two (2) to deny, three (3) to replay."
- NOTE:** This prompt will be repeated for each service entered.
20. The client should press the appropriate option.
Santrax will say: "Thank you, bye."
21. Hang up.

Sandata

TVW

Call Reference Guide:

«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

Dial:

1-«Primary_Phone»

Features:

Call In/Out Prompting

Group Visit - No

Select Location

Task

Client Verification - Service

Select Language

Fixed Visit Verification -No

Change Service

Client Verification- Recording

Client Verification- Visit