

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

- Your Santrax 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: "Welcome, please enter your Santrax ID."
  3.  **Enter your Santrax ID.**  
 Santrax will say: "Is this a group visit? Press one (1) for Yes or two (2) for No."
  4.  **Press one (1) for group visit.**  
 Santrax will say: "Press one (1) to start a new group visit, two (2) to continue to your group visit, three (3) to join a group visit, or four (4) to exit group visit menu."  

(1) To start a new group visit:	(2) To continue a group visit:
5.  <b>Press one (1) to start a new group visit.</b>  Santrax will say: "You will start a new group visit with visit code (GROUP CODE)." 6. <b>Continue to step 7.</b>	5.  <b>Press two (2) to continue your group visit.</b>  Santrax will say: "Please enter the group visit code." 6.  <b>Press the numbers of the group visit code.</b>  Santrax will say: "You will join the group visit with visit code (GROUP CODE)." 
  -  Santrax will say: "Please press one (1) to add a client to the group visit, two (2) to complete a visit for a client, three (3) to hear the group visit code, four (4) to abandon this whole group visit or hang up if you would like to end this call."
  7.  **Press (1) to add a client.**

-  Santrax will say: "Please choose your location of service. Press one (1) for Home, Press two (2) for Community".
- 8.  **Press one (1) to select home or two (2) to select community.**  
 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. If this is not an FVV call, press pound (#) and continue.  
 **Press the pound (#) key to continue.**  
 Santrax will say: "Please select one (1) to call in or two (2) to call out."
- 9.  **Press the one (1) key to "Call In".**  
 Santrax will say: "Received at (TIME). Thank you, bye."
- 10.  **Hang up.**

**Calling Out:** When leaving the client's home, make sure you have the following information:

- Your Santrax ID, Group Visit Code.
  - The Service ID, Task ID, if required.
  - The Client is available to verify the visit.
- Follow steps 1 through 4 and then continue.**
-  Santrax will say: "Press one (1) to start a new group visit, two (2) to continue to your group visit, three (3) to join a group visit, or four (4) to exit group visit menu."
  -  **Press two (2) to continue your group visit.**  
 Santrax will say: "Please enter the group visit code."
  - 11.  **Enter the group visit code.**  
 Santrax will say: "You will continue group visit with visit code (GROUP CODE). Please press one (1) to add a client to the group visit, two (2) to complete a visit for a client, three (3) to hear the group visit code, four (4) to abandon this whole group visit or hang up if you would like to end this call."  
**NOTE:** If you made a mistake and need to discard all data you have previously entered for all visits in this group, press four (4) to abandon the whole group visit.
  - 12.  **Press the two (2) key to complete the visit for a client.**  
 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. If this is not an FVV call, press pound (#) and continue.

13.  Press the pound (#) key to continue.  
 Santrax will say: "Please select one (1) to call in or two (2) to call out."
14.  Press the two (2) key to "Call Out."  
 Santrax will say: "Received at (TIME). "Please enter the Service ID."
15.  Enter the Service ID number of 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."
16.  Press the one (1) key to accept or press the two (2) key to retry.  
 Santrax will say: "Enter number of tasks."
17.  Enter the total number of tasks performed for the client.  
 Santrax will say: "Enter task ID."
18.  Enter the Task ID number for the task you performed.  
 Santrax will say: " (Task Description(s) 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."
19.  Press '1' to record the client's voice.  
 OR  
 Press '2' if the client is unable to participate.
20.  Hand the phone to the client and the client 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."
21.  The client should say their first, 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."
22.  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."
23.  The client should press the appropriate option. Hang up and repeat for each client in the group visit when their visit is done.



## Group Visit 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         | Select Language                |
| Group Visit - Yes             | Fixed Visit Verification -No   |
| Select Location               | Client Verification- Recording |
| Task                          | Client Verification- Visit     |
| Client Verification - Service |                                |