Sandata Telephone Visit Verification (TVV)

Call Reference Guide

	LANGUAGE	DIAL
Agency Account Number: _____		
Santrax ID: _____	English	
Client ID: _____		

Call In Instructions

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). Para Español, pulse dos (2).

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 Rural Home, press two (2) for Rural Community, press three (3) for Urban Home, press four (4) for Urban Community, press (5) for replay."

5. **Press one (1) for rural home, press two (2) for rural community, press three (3) for urban home, press four (4) for urban community, press (5) for replay.**
   Santrax will say: "Please select one (1) to call in or two (2) to call out."

6. **Press the one (1) key to "Call In".**
   Santrax will say: "Received at (TIME). Thank you, bye."

7. **Hang up.**

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Call Out Instructions

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

- Your Santrax ID.
- The Service ID
- Task ID.
- The Client is available to verify the visit.

8. **Follow steps 1 thru 5 and then continue.**
   Santrax will say: "Please select one (1) to call in or two (2) to call out."

9. **Press two (2) to "Call Out."**
   Santrax will say: "Received at (TIME). Please enter the Service ID."

10. **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."

11. **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?"

To continue with a new service	For the final service
▶ Repeat Step 10 and Step 11 for the new service. ▶ Continue to Step 17. **NOTE:** Information entered in Steps 15 to 20 is for the service that was already performed. Santrax will say: "Enter number of tasks."	▶ Continue to step 12 to complete the visit for the service performed.

12. Press the total number of tasks performed for the client.
Santrax will say: "Enter task ID."

13. 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

14. Press one (1) to record the client's voice.
OR
Press two (2) if the client is unable to participate.

15. 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."

16. 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."

17. 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.

18. **The client should press the appropriate option.**
Santrax will say: "Thank you, bye."

19. **Hang up.**