Sandata

Get more right from the start

Telephonic Visit Verification (TVV)

objectives

After completing this lesson, you will be able to:

▶ Understand the call process utilizing the client's telephone or any phone associated with the client.

▶ Explain the different Call Reference Guides (CRG) available for use.

Introduction

▶ TVV is available as an alternate to the mobile (SMC) check-in/check-out process. TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, because the device has not yet been delivered, etc.).

▶ When using TVV, caregivers can call-in/call-out from any authorized phone number listed in the client record.

▶ Agencies are assigned two toll-free numbers for their account.

An employee can start a visit using MVV and complete the visit using TVV and vice versa, if required.
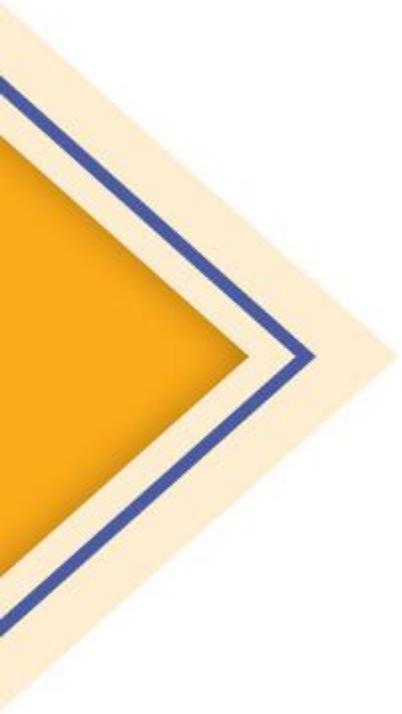
Call Reference Guides
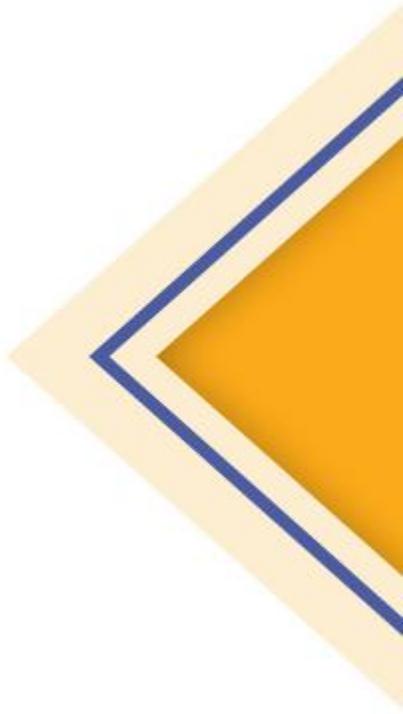
Call Reference Guide (CRG): calling instructions

Note: *The specific steps of the CRG will vary based on your system configuration.*

Call Reference Guide (CRG): calling instructions

Calling Instructions — STX«ACCOUNT»

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

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

9. Follow steps ❶ – ❸, and then continue.

   Santrax will say: "Please select "1" to call in or "2" to call out."

10. Press the two (2) key to "Call Out".

    Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."

11. Enter the ID for the first client receiving service.

    Santrax will say: "Please enter the Service ID."

12. Press the Service ID Number you performed.
    Refer to your agency's Service list.

    Santrax will say: "You entered (SERVICE). Please press "1" to accept, "2" to retry."
    Once the service has been entered, the system will repeat it back to you. If the service is incorrect, press "2" to re-enter the service. When the service is correct, press "1" to accept.

13. Press the one (1) key to accept, or press the two (2) key to retry.

    Santrax will say: "Enter number of tasks."

14. Press the total number of tasks performed for the client.

    Santrax will say: "Entered task ID."

    Press the Task Number you preformed.

NOTES:
- Refer to your agency's task list.
- 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.

Calling Instructions — STX«ACCOUNT»

- *If you made a mistake entering Tasks, press "00", the system will confirm by saying: "Starting Over, Enter number of tasks". Enter all task ID's again. Important: "00" can neither be used when selecting to enter a single task nor after the last task entry of a multi-task visit. Contact your agency to correct any errors/exceptions.*

    Santrax will say: "You entered (NUMBER) task(s). To record the client's voice please press "1" and hand the phone to the client, or press "2" if the client is unable to participate

15. Press '1' to record the client's voice.
    OR

    Press '2' if the client is unable to participate then skip to step ⓴.

16. Hand the phone to the client and the client will be asked to state their first and last name and today's date.

    Santrax will say: "Please say your first, last name and today's date."

17. The client should say their first, last name and today's date.
    NOTE:
    The system may skip the following prompts. If the prompt is skipped, please continue with the next prompt, or hang up if done.

    Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press one to confirm, two to deny, 3 to replay."

18. The client should press the appropriate option.
    Santrax will say: "The service performed was (SERVICE). Press one to confirm, two to deny."

19. The client should press the appropriate option.

    Santrax will say: "Please enter second client ID or hang up if done."

20. Enter the ID for the second client receiving service.
21. Follow the prompts to enter client IDs until all clients that share this call time have been entered.
    NOTE: *If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say: "Thank you, bye."*

22. Hang up.

Call Reference Guide: task list

In addition to the Call Reference Guide, a provider agency may also receive a Tasks and Services list *(based on system configuration).*

These codes should be entered during the call-out call process.

Each item has a unique ID for entry on the call when prompted.

English Task and Service List

(AGENCY NAME/ID HERE)

(PHONE NUMBERS HERE)

Tasks

Task ID	Description	Task ID	Description
01	Bath - Bed/Sponge Bath	10	IADLs - Errands
02	Bath - Shower/Tub	11	IADLs - Med Reminders
03	Dress - Assist w Dressing	12	Mobility - Ambulation
04	Hygiene - Hair Care/Clean	13	Mobility - In/Out Bed
05	Hygiene - Mouth Care	14	Mobility - Transfer
06	Hygiene - Nail Care	15	Toilet - Bathroom
07	IADLs - Meal Prep	16	Toilet - Bedside Commode
08	IADLs - Light House Clean	17	Toilet - Urinal/Bedpan
09	IADLs - Laundry	18	Toilet - Incontinence

Services

Service ID	Description	Service ID	Description
101	Residential Habilitation	119	Respite Care Per Hour
102	Medication Training and Support Services, individual	120	Respite Care 15 Min
103	Medication Training and Support Services, family/couple w/individual	121	Residential Habilitation Services, (over 35 hrs/wk)
104	Medication Training and Support Services, family/couple w/o individual	122	Residential Habilitation Services, (35 or less hrs/wk)
105	Medication Training and Support Services, Individual	123	Residential Habilitation Daily 1 (2 person setting, Algo 3)
106	Medication Training and Support Services, family/couple w/individual	124	Residential Habilitation Daily 2 (2 person setting, Algo 4)
107	Medication Training and Support Services, family/couple w/o individual	125	Residential Habilitation Daily 3 (2 person setting, Algo 5)
108	Home and Community-Based Habilitation and Support Services	126	Residential Habilitation Daily 4 (3 person setting, Algo 3)
109	Home and Community-Based Habilitation and Support Services, family/couple w/ individual	127	Residential Habilitation Daily 5 (3 person setting, Algo 4)
110	Home and Community-Based Habilitation and Support Services, family/couple w/o individual	128	Residential Habilitation Daily 6 (3 person setting, Algo 5)
111	Attendant care services agency	129	Residential Habilitation Daily 7 (4 person setting, Algo 3)
112	Attendant care services (self-directed); per 15 minutes	130	Residential Habilitation Daily 8 (4 person setting, Algo 4)
113	Attendant care services (non-agency)	131	Residential Habilitation Daily 9 (4 person setting, Algo 5)
114	Attendant care services (self-directed overtime)	132	Specialized Medical Equipment New
115	Homemaker service, NOS, (agency)	133	Specialized Medical Equipment Install
116	Homemaker service, NOS, (non-agency)	134	Specialized Medical Equipment Maintain
117	Unskilled respite care, not hospice	135	Specialized Medical Equipment Replacement and Repair
118	Unskilled Respite Care	136	Participant Assistance and Care

Additional Visit Scenarios

Multiple clients in the same home

- If a provider cares for more than one client in the same home (e.g. husband and wife), but not at the same time:
  - ▸ The caregiver calls in and out and enters the Client ID of the client receiving care at that time.

- If both clients in the home are receiving care, back to back:
  - ▸ The caregiver calls in and out for each client receiving care. The caregiver enters the Client ID for each client's calls. A total of four calls are made for this type of visit.

Multiple providers caring for a single client at the same time

- If multiple providers deliver care to a single client at the same time:
  - ▸ Each caregiver calls in and out for their visit, capturing the visit hours and service performed.

24 hour Live-In cases

- If a client receives 24 hour live-in care:
  - ▸ The caregiver calls upon arrival, then once each day around the scheduled start time (enters tasks completed for the previous day, if applicable) and calls when leaving at the end of the shift.

Questions...