

Sandata Group Visit

Call Reference Guide

Agency Account Number: <<Account>>
 Santrax ID: _____
 Client ID: _____

LANGUAGE	DIAL
English	<999-123-4567>

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 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:

5. Press one (1) to start a new group visit.

Santrax will say: "You will start a new group visit with visit code (GROUP CODE)."

6. Continue to step 7.

(2) To continue a group visit:

5. Press two (2) to continue your group visit.

Santrax will say: "Please enter the group visit code."

6. Press the numbers of the group visit code.

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."

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7. Press (1) to add a client.

Santrax will say: "Please choose your location of service. press one (1) for Rural Home, press two (2) for Rural Community, press one (3) for Urban Home, press two (4) for Urban Community, press (5) for replay."



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

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



9. Press the one (1) to "Call In".

Santrax will say: "Received at (TIME). Thank you, bye."



10. Hang up.

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Call Out Instructions

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

- ▶ Your Santrax ID.
- ▶ Your Group Visit Code
- ▶ The Service ID
- ▶ Task ID.
- ▶ The Client is available to verify the visit.

**11. 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."

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. Select two (2) to complete the visit for a client.**

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

**13. Press two (2) to "Call Out."**

Santrax will say: "Received at (TIME). Please enter the Service ID."

**14. Enter 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."

**15. Press the one (1) to accept or press the two (2) to retry.**

Santrax will say: "Enter number of tasks."

**16. Press the total number of tasks performed for the client.**

Santrax will say: "Enter task ID."

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17. 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 the 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



18. Press one (1) to record the client's voice.

OR

Press two (2) if the client is unable to participate.



19. 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."



20. 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."



21. The client should press for the appropriate option.

Santrax will say: "The service performed was (SERVICE). Press one (1) to confirm, two (2) to deny, three (3) to replay."



22. Hang up and repeat for each client in the group visit when their visit is done.