

Sandata Group Visit

Call Reference Guide

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

LANGUAGE	DIAL
English	

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). नेपालीको लागि, कृपया तीन थिच्नुहोस्. Kwa Kiswahili, tafadhali bonyeza nne (4). Wixii Soomaali ah fadlan shan taabo (5). 简体中文 · 请按 6."



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."

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(1) To start a new group visit:	(2) To continue a 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.	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."



7. Press (1) to add a client.
- Santrax will say: "Please press one (1) to call in or two (2) to call out."



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



9. 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.



10. 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.



11. 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.”



12. Press two (2) to “Call Out.”

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



13. 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.”



14. Press one (1) to accept the service entered.

OR

Press two (2) to retry to enter the correct service and return to step 13.



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