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

- Your Santrax ID
- The Client(s) ID
- Group visit code if available.

1. **Dial any of the toll-free numbers assigned to your agency.**
   If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.

   The Santrax system will say: **"For English, please press one (1). For Spanish, please press two (2).**
   These prompts are heard in their respective languages.

2. **Press the number that corresponds to the language you wish to hear.**
   All prompts for the remainder of the call will be heard in that language.

   Santrax will say: **"Welcome, 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 (1) for Yes or (2) for No."**

4. **Press (1) for group visit.**

   Santrax will say: **"Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."**

(1) To start a new group visit:	(3) To join an existing group visit:
5. **Press (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 ❽.**	6. **Press (3) to join an existing group visit.** Santrax will say: **"Please enter the group visit code."** 7. **Press the numbers of the group visit code.** Santrax will say: **"You will join the group visit with visit code (GROUP CODE)."**

8. Press **(1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call.**

   Santrax will say: **"Please choose your location of service. Press (1) one for Home, Press (2) for Community".**

9. **Press (1) to select home or (2) to community.**

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

10. **Press the (1) key to "Call In".**

    Santrax will say: **"Received at (TIME).**

11. **Hang up.**

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

- Your Santrax ID, the Service ID, the Task ID .
- The Group Visit code.

12. **Follow steps ❶ thru ❹ and then continue.**

    Santrax will say: **"Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."**

    Press (2) to continue your group visit.

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

13. **Press the numbers of the group visit code.**

    Santrax will say: **"You will continue group visit with visit code (GROUP CODE). Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (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 <u>all</u> data you have previously entered for <u>all</u> visits in this group, press (4) to abandon the whole group visit.

14. **Press the (2) key to complete the visit for a client.**

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

15. **Press the (2) key to "Call Out."**

16. **Calling Instructions**   STX

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

17. ✋ **Press the Client ID number.**

📞 Santrax will say: **"Enter Service ID."**

18. ✋ **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."**

19. ✋ **Press the one (1) key to accept or press the two (2) key to retry.**

📞 Santrax will say: "**Would you like to continue the visit with the new service?**"

20. ✋ **Press the (1) for Yes or to (2) for No**

Note: When switching to a different service for the same client please press (1) for Yes and repeat steps ❶❼-❶❽ to enter the next service before continuing. Press (2) for No when all services are complete.

📞 Santrax will say: **"Enter number of tasks."**

20. ✋ **Press the total number of tasks performed for the client.**

📞 Santrax will say: **"Entered task ID."**

21. ✋ **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.

⏩ 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). Thank you, bye,".**

21. 📞 **Hang up.**

Sandata
Call Reference Guide:

Agency Account Number: STX

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Write your Santrax ID number above for easy reference.

Dial:

Features:

Call In/Out Prompting   Change Service

Group Visit – Yes   Select Location

Task