



## Calling In/Out

Company Name: \_\_\_\_\_

Call In/Out Telephone Number: \_\_\_\_\_

### Call In

**Before you start, have the following ready:**

- Your Account Number: \_\_\_\_\_
- Your Santrax ID: \_\_\_\_\_
- Your Passcode: \_\_\_\_\_
- Client ID: \_\_\_\_\_

### Call In Steps

*Follow the interactive voice prompts.*

- 1. Dial the toll-free number.**  
Santrax will say: Welcome to Santrax. For English, please press one (1). Para español, presione dos (2).
- 2. Select a language.**
- Santrax will say: Please enter your account number.
- 4. Enter your account number.**
- Santrax will say: Please enter your Santrax ID.
- 6. Enter your Santrax ID.**
- Santrax will say: Please enter your passcode.
- 8. Enter your passcode.**
- Santrax will say: Please choose your location of service. Press one (1) for home, press two (2) for community, press three (3) for replay.
- 10. Choose your location of service.**
- Santrax will say: Please select one (1) for call-in or two (2) for call-out.
- 12. Select call in.**
- Santrax will say: Received at (TIME). Please enter first client ID or hang up if done.
- 14. Enter the first Client ID (or hang up if done).**
- Santrax will say: Thank you, bye.
- 16. Hang up.**

### Call Out

**Before you start, have the following ready:**

- Your Account Number: \_\_\_\_\_
- Your Santrax ID: \_\_\_\_\_
- Your Passcode: \_\_\_\_\_
- Client ID: \_\_\_\_\_
- Service ID (See Service List): \_\_\_\_\_

### Call Out Steps

*Follow the interactive voice prompts.*

- 1. Dial the toll-free number.**  
Santrax will say: Welcome to Santrax. For English, please press one (1). Para español, presione dos (2).
- 2. Select a language.**
- Santrax will say: Please enter your account number.
- 3. Enter your account number.**
- Santrax will say: Please enter your Santrax ID.
- 4. Enter your Santrax ID.**
- Santrax will say: Please enter your passcode.
- 5. Enter your passcode.**
- Santrax will say: Please choose your location of service. Press one (1) for home, press two (2) for community, press three (3) for replay.
- 6. Choose your location of service.**
- Santrax will say: Please select one (1) for call-in or two (2) for call-out.
- 7. Select call out.**
- Santrax will say: Received at (TIME). Please enter first client ID or hang up if done. (If hanging up, the call will disconnect with no verbal confirmation.)
- 8. Enter the first Client ID (or hang up if done).**
  - If entering first client ID:  
Santrax will say: Please enter the service ID.
- 9. Enter the Service ID.**  
Santrax will say: You entered (SERVICE ID). Please press one (1) to accept, two (2) to retry.
- 10. Accept or retry.**  
(Continue on the next page.)

### 11. Hand the phone to the client to record their voice.

Santrax will say: 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.

- If the client can participate, they will say their name and date.
- If the client can't participate, the call ends.

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

- The client will say their first and last name and the date.
- Santrax will say:
  - In call received at (TIME).
  - Out call received at (TIME).
  - Total visit length (TIME).
  - Press one (1) to confirm, two (2) to deny, three (3) to replay.

### 11. Press confirm, deny, or replay.

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

### 12. Press confirm, deny, or replay.

Santrax will say: Thank you, bye.

### 13. Hang up.