



## 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.
2. Select a language.
3. Enter your account number.
4. Enter your Santrax ID.
5. Enter your passcode.
6. Choose your location of service.
7. Select call in.
8. Enter the first Client ID (or hang up if done).
9. 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.
2. Select a language.
3. Enter your account number.
4. Enter your Santrax ID.
5. Enter your passcode.
6. Choose your location of service.
7. Select call out.
8. Enter the first Client ID (or hang up if done).
9. Enter the Service ID.
10. Accept or retry.
11. Hand the phone to the client to record their voice.
  - If the client can participate, they will say their name and date.
  - If the client can't participate, the call ends.
12. Press confirm, deny, or replay.
13. Press confirm, deny, or replay again.
14. Hang up.