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

- Your Santrax ID.

Remember: When speaking to Santrax on any toll-free line, speak in English, slowly and clearly one digit at a time (1075 = one, zero, seven, five).

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.

   Santrax will say: **"Welcome, please enter your Santrax ID."**

2. **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."**

3. **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:*
4. **Press (1) to start a new group visit.** Santrax will say: **"You will *start* a new group visit with visit code (GROUP CODE)."** 5. **Continue to step ❻.**	4. **Press (3) to join an existing group visit.** Santrax will say: **"Please enter the group visit code."** 5. **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 (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."**

6. **Press (1) to add a client.**

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

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

   Santrax will say: **"Received at (TIME) Please enter first client ID or hang up."**

8. **Enter the ID for the first client receiving service.**

   Santrax will say: **"Please enter second client ID or hang up if done."**

9. **Enter the ID for the second client receiving service.**

Calling Instructions STX

10. **Follow the prompts to enter client IDs until all clients that share this call time have been entered.**
    NOTE:
    If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say: **"Thank you, bye."**

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 Client is available to verify the visit.

12. **Follow steps ❶ thru ❸ 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."**

13. **Press (2) to continue your group visit.**

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

14. **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 all data you have previously entered for all visits in this group, press (4) to abandon the whole group visit.

15. **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."**

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

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

17. **Enter the ID for the first client receiving service.**

    Santrax will say: **"Please enter the 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."**
    Once the service has been entered, the system will repeat it back to you. If the service is incorrect, press "2" to re-enter the service. When the service is correct, press "1" to accept.

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

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 performed.**

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). To record the client's voice please press "1" and hand the phone to the client, or press "2" if the client is unable to participate."**

22. **Press '1' to record the client's voice.**

OR

Press '2' if the client is unable to participate then skip to step 25.

23. **Hand the phone to the client and the client will be asked to state their first and last name and today's date.**

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

24. **The client should say their first, last name and today's date.**

NOTE: *The system may skip the following prompts. If the prompt is skipped, please continue with the next prompt, or hang up if done.*

Santrax will say: **"In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press one to confirm, two to deny, 3 to replay."**

25. **The client should press the appropriate option.**

Santrax will say: **"The service performed was (SERVICE). Press one to confirm, two to deny."**

26. **The client should press the appropriate option.**

Santrax will say: **"Please enter second client ID or hang up if done."**

27. **Repeat steps 17 thru 26 for each additional client beyond the first.**

Or

Hang up if done.

28. **Hang up.**

santrax®

ELECTRONIC VISIT VERIFICATION™

Call Reference Guide:

Agency Account Number: STX

_____

Write your Santrax ID number above for easy reference.

Dial:

Or

Features:

Group Visit – Yes	Call In/Out Prompting
Multi - Client	Select Service
Task	Client Voice Recording
Client Verification - Visit	Client Verification - Service