Individual Visit Call Process - English Line

Call-In	
1	Dial either English toll-free number.
	Santrax will say: *"Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."*
	If the Santrax ID entered does not match to an employee record, Santrax will say: *"You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say: *"Press 1 to call-in or 2 to call-out."*
5	Press the 1 to call-in.
	Santrax will say: *"Received at [Time]."* After a brief pause, Santrax will say: *"Please enter first client ID or hang up if done."*
	If the phone number the call is coming from is only associated to more than one (1) client, enter the system generated client ID found in the client record in Sandata EVV.
6	Hang up if no client ID is needed or all client IDs have been entered.

Santrax IDs and Client IDs

- The Santrax ID is a unique system-generated number identifier for the employee and is used by the employee to identify themselves on a TVV call.
- The Client ID is a unique system-generated number identifier for the client, used by the employee on a TVV call to identify the client.

Call-Out

1	Dial either English toll-free number.
	Santrax will say: *"Welcome, please enter your Santrax ID."*
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: *"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."*
	If the Santrax ID entered does not match to an employee record, Santrax will say: *"You have entered an invalid Santrax ID, please try again."*
3	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say: *"Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say: *"Received at [Time]."* After a brief pause, Santrax will say: *"Please enter first client ID or hang up if done."*
6	Enter the Client ID number.
	Santrax will say: *"Please enter the Service ID."*
7	Press the three-digit ID of the care performed.
	Santrax will say: *"You entered [Service description]. Please press 1 to accept, 2 to retry."*
8	Press the 1 to accept.

For each prompt, Santrax allows a caller three attempts to enter the information correctly. After three unsuccesful attempts, the call is terminated. If the call is terminated, the caregiver should call and inform the agency. The agency will fix the call in Visit Maintenance.

After the service, *Santrax will say: "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."*

1) Press (1) to record client's voice (hand phone to client):
   a) *Santrax will say: "Please say your first and last name and today's date."*
   b) The client will say their name and the date.
   c) *Santrax will say: "In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press 1 to confirm, 2 to deny, 3 to replay."*
   d) Client will press appropriate choice.
   e) *Santrax will say: "The service performed was [service description]. Press 1 to confirm, 2 to deny, 3 to replay."*
   f) Client will press appropriate choice.
   g) *Santrax will say: "Thank you, bye."*
   h) Hang up.

2) Press (2) if the client is unable to participate.
   a) *Santrax will say: "Thank you, bye."*
   b) Hang up.

For DODD clients, when Santrax prompts: *"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."*

Simply hang up to end the call since the functionality does not apply to DODD clients.