SANDATA ELECTRONIC VISIT VERIFICATION (EVV): TELEPHONIC VISIT VERIFICATION (TVV)

OBJECTIVES

After completing this lesson, you will be able to:

◆ Understand the call process utilizing the client's telephone or any phone associated with the client.

◆ Explain the different Call Reference Guides (CRG) available for use.

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INTRODUCTION

◆ TVV is available as an alternate to the SMC call-in/call-out process. TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, because the device has not yet been delivered, etc.).

◆ When using TVV, employees can call-in/call-out from any phone linked to the client record.

◆ Agencies are assigned to toll-free numbers for their account.

An employee can start a visit using MVV and complete the visit using TVV and vice versa, if required.

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CALL REFERENCE GUIDES

Sandata TECHNOLOGIES

MULTI-LANGUAGE CALL-IN

Call Reference Guide:

«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

_____
Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:

Select Language	Call In/Out Prompting
Select Service	Multi - Client
Task	Client Verification - Recording
Client Verification - Visit	Client Verification - Service

Calling Instructions   STX«ACCOUNT»

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.

   The Santrax system will say: "For English, please press one (1). For Spanish, please press two (2). For Somali, please press three (3). For Chinese Mandarin, please press four (4). For Arabic, please press five (5). For Russian, please press six (6).
   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: "Please select "1" to call in or "2" to call out."

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

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

5. Enter the ID for the first client receiving service.

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

6. Enter the ID for the second client receiving service.

7. 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."

8. Hang up.

MULTI-LANGUAGE CALL-OUT

Calling Instructions — STX«ACCOUNT»

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.

9. Follow steps ❶ – ❸, and then continue.

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

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

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

11. Enter the ID for the first client receiving service.

Santrax will say: "Please enter the Service ID."

12. 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.

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

Santrax will say: "Enter number of tasks."

14. Press the total number of tasks performed for the client.

Santrax will say: "Entered task ID."

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.

Calling Instructions — STX«ACCOUNT»

- *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

15. Press '1' to record the client's voice.
OR
Press '2' if the client is unable to participate then skip to step ❷⓪.

16. 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."

17. 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."

18. The client should press the appropriate option.
Santrax will say: "The service performed was (SERVICE). Press one to confirm, two to deny."

19. The client should press the appropriate option.

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

20. Enter the ID for the second client receiving service.
21. 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."

22. Hang up.

CALL REFERENCE GUIDES: TASK AND SERVICE LIST

◆ Inside addition to the Call Reference Guide, a provider agencies also receive a Tasks and Services list caregivers for clients.

◆ These codes should be entered during the call-out call process.

◆ Each Service ID is a three digit numeric code.

santrax TELEPHONY

English Task and Service List

(AGENCY NAME/ID HERE)

(PHONE NUMBERS HERE)

Tasks

Task ID	Description	Task ID	Description
01	Bath - Bed/Sponge Bath	10	IADLs - Errands
02	Bath - Shower/Tub	11	IADLs - Med Reminders
03	Dress - Assist w Dressing	12	Mobility - Ambulation
04	Hygiene - Hair Care/Clean	13	Mobility - In/Out Bed
05	Hygiene - Mouth Care	14	Mobility - Transfer
06	Hygiene - Nail Care	15	Toilet - Bathroom
07	IADLs - Meal Prep	16	Toilet - Bedside Commode
08	IADLs - Light House Clean	17	Toilet - Urinal/Bedpan
09	IADLs - Laundry	18	Toilet - Incontinence

Services

Service ID	Description	Service ID	Description
101	Residential Habilitation	119	Respite Care Per Hour
102	Medication Training and Support Services, individual	120	Respite Care 15 Min
103	Medication Training and Support Services, family/couple w/individual	121	Residential Habilitation Services, (over 35 hrs/wk)
104	Medication Training and Support Services, family/couple w/o individual	122	Residential Habilitation Services, (35 or less hrs/wk)
105	Medication Training and Support Services, Individual	123	Residential Habilitation Daily 1 (2 person setting, Algo 3)
106	Medication Training and Support Services, family/couple w/individual	124	Residential Habilitation Daily 2 (2 person setting, Algo 4)
107	Medication Training and Support Services, family/couple w/o individual	125	Residential Habilitation Daily 3 (2 person setting, Algo 5)
108	Home and Community-Based Habilitation and Support Services	126	Residential Habilitation Daily 4 (3 person setting, Algo 3)
109	Home and Community-Based Habilitation and Support Services, family/couple w/ individual	127	Residential Habilitation Daily 5 (3 person setting, Algo 4)
110	Home and Community-Based Habilitation and Support Services, family/couple w/o individual	128	Residential Habilitation Daily 6 (3 person setting, Algo 5)
111	Attendant care services agency	129	Residential Habilitation Daily 7 (4 person setting, Algo 3)
112	Attendant care services (self-directed); per 15 minutes	130	Residential Habilitation Daily 8 (4 person setting, Algo 4)
113	Attendant care services (non-agency)	131	Residential Habilitation Daily 9 (4 person setting, Algo 5)
114	Attendant care services (self-directed overtime)	132	Specialized Medical Equipment New
115	Homemaker service, NOS, (agency)	133	Specialized Medical Equipment Install
116	Homemaker service, NOS, (non-agency)	134	Specialized Medical Equipment Maintain
117	Unskilled respite care, not hospice	135	Specialized Medical Equipment Replacement and Repair
118	Unskilled Respite Care	136	Participant Assistance and Care

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CALL REFERENCE GUIDES:
MULTI LANGUAGE LINE CALL PROCESS

Call-In	
1	Dial the toll-free number.
	Santrax will say: "For English, please press one (1). For Spanish, please press two (2). For Egyptian Arabic, please press three (3). For Russian, please press four (4). For Chinese Mandarin, please press five (5). For Somali, please press six (6). *Each prompt will be heard in its respective language.
2	Press the number that corresponds to the desired 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: "Press 1 to call-in or 2 to call-out."
4	Press the one (1) key to "call-in." **
	Santrax will say: "Received at [Time]. Thank you, bye." (if the phone number the call is coming from is only associated to one (1) client, otherwise Santrax will give the time then prompt for a client ID)
	** When a phone is associated to more than one client in Sandata EVV, you will be prompted to provide the Client ID to identify the client for whom care is being provided. Santrax will say: "Please enter first client ID or hang up if done." Enter the client ID for the client receiving care.
5	Hang up.

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CALL REFERENCE GUIDES:
MULTI LANGUAGE LINE CALL PROCESS

Call-Out	
1	Dial the toll-free number.
	Santrax will say: "For English, please press one (1). For Spanish, please press two (2). For Somali, please press three (3). For Chinese Mandarin, please press four (4). For Egyptian Arabic, please press five (5). For Russian, please press six (6). *Each prompt will be heard in its respective language.*
2	Press the number that corresponds to the desired 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: "Press 1 to call-in or 2 to call-out."
4	Press the two (2) key to "call-out."
	Santrax will say: "Received at [Time]." (if the phone number the call is coming from is only associated to one (1) client, otherwise Santrax will give the time then prompt for a client ID)
	Santrax will say: "Please enter the Service ID."
5	Press the service ID performed (Service IDs and Tasks are listed on a separate sheet)
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."
6	Please press 1 to accept, 2 to re-enter
	Santrax will say: "Enter number of tasks."
7	Enter the total number of tasks performed for the client.
	Santrax will say: "Enter task ID."
8	Enter the ID of the task performed. Santrax will playback the task description. (If more than one task was entered as the total, Santrax will prompt for the next task ID. Repeat this step until all tasks are entered.

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.

Press (1) to record client's voice (hand phone to client):

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

The client will say their name and the date

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."

Client will press appropriate choice.

Santrax will say: "The service performed was [service]. Press one to confirm, two to deny."

Client will press appropriate choice.

Santrax will say: "Thank you, bye."

Hang up.

Press (2) if the client is unable to participate.

Santrax will say: "Thank you, bye."

Hang up.

QUESTIONS…