

**Sandata Group Visit**

**Call Reference Guide**

Agency Account Number: \_\_\_\_\_  
 Santrax ID: \_\_\_\_\_  
 Client ID: \_\_\_\_\_

LANGUAGE	DIAL
English	

**Call In Instructions**

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

- ▶ Your Santrax ID.
- ▶ Your Client’s ID.
- ▶ Group Visit Code (if joining a current Group Visit).

**1. Dial the toll-free number assigned to your agency.**

Follow the prompts when the Santrax system says:	Your Actions:
2. “For English, please press 1. For Spanish, please press 2. For Mandarin Chinese, please press 3. For Cantonese, please press 4. For Vietnamese, please press 5. For Tagalog, please press 6, For Korean, please press 7. For Egyptian Arabic, please press 8. For Armenian, please press 9.”	<b>Press the number that corresponds to the language you wish to hear. The rest of the call will be in the language you chose.</b>
3. “Welcome to California Electronic Visit Verification. Please enter your Santrax ID.”	<b>Press the numbers of your Santrax ID on the touch tone phone.</b>
4. “Is this a group visit? Press 1 for Yes or 2 for No.”	<b>Press 1 for Yes.</b>
5. “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.”	<b>Press 1 to start a new group visit. Write down the Group visit code Santrax provides. Continue to Step 6.</b> -or- <b>Press 3 to join an existing group visit and enter the group visit code when prompted.</b>
6. “Please press the 1 key to add a client to the group visit, the 2 key to complete a visit for a client, the 3 key to hear the group visit code, the 4 key to abandon this whole group visit or hang up if you would like to end this call.”	<b>Press 1 to add a client to a group visit.</b>

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7. "Please choose your location of service. Press 1 for Home, press 2 for Community, press 3 for Replay."	Press 1 to select home, 2 to select community.
8. "Please select (1) to call in or (2) to call out."	Press 1 to call in.
9. "Received at (TIME). Please enter first client ID or hang up if done."	Press the numbers of the client's ID.
10. "Please enter second client ID or hang up if done."	Repeat step for each additional client. - or - Hang up if done.

**Call Out Instructions**

When leaving the client's home, make sure you have the following information:

- ▶ Your Santrax ID.
- ▶ The Client's ID.
- ▶ The Service ID.
- ▶ The Group code. **The Group code is REQUIRED to complete the TVV visits so please ensure you have that before calling out.**

Follow steps 1 thru 3 above for Call In. Then,	Your Actions:
11. "Is this a group visit? Press 1 for Yes or 2 for No."	Press 1 for Yes.
12. "Please enter the group visit code."	Press the numbers of the group visit code.
13. You will continue the 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."	Press 2 to complete the visit for a client.
14. "Please choose your location of service. Press 1 one for Home, press 2 for Community, press 3 for Replay."	Press 1 to select home or 2 to select Community.
15. "Please select 1 to call in or 2 to call out."	Press 2 to call out.
16. "Received at (TIME). Please enter first client ID or hang up if done."	Press the numbers of the client's ID.
17. "Please enter the Service ID."	Press the Service ID Number you performed. Refer to your agency's service list.
18. "You entered (SERVICE). Please press 1 to accept, 2 to retry."	Press the one 1 to accept or press 2 to retry.

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<p><b>19.</b> “Would you like to continue the visit with the new service?”</p>	<p><b>Press 1 for Yes or 2 for No.</b> <b>Note:</b> <b>When switching to a different service for the same client please press 1 for Yes and repeat steps 17-18 to enter the next service before continuing. Press 2 for No when all services are complete.</b></p>
	<p><b>Repeat steps 16 to 19 for each additional client beyond the first</b> <b>-or-</b> <b>Hang up if done.</b></p>