

**Calling In:** 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 available.

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 Egyptian Arabic, please press two (2). For French, please press three (3). For Fulah, please press four (4). For Hindi, please press five (5). For Mandarin Chinese, please press six (6), For Nepali; please press seven (7). For Russian, please press eight (8). For Serbian, please press nine (9). For Somali, please press ten (10). For Spanish, please press eleven (11), For Swahili, please press twelve (12), For Vietnamese, please press thirteen (13).”**  
*Call prompts are heard in the selected 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: **“You entered (SANTRAX ID). Press (1) for Yes, (2) for No.”**

4.  **Press (1) to confirm your Santrax ID or press (2) to retry.**

 Santrax will say: **“Is this a group visit? Press (1) for Yes or (2) for No.”**

5.  **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:**

6.  **Press (1) to start a new group visit.**

6.  **Press (3) to join an existing group visit.**

 Santrax will say: **“You will start a new group visit with visit code (GROUP CODE).”**

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

7. **Continue to step ③.**

7.  **Press the numbers of the group visit code.**

 Santrax will say: **“You will join 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.”**

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

 Santrax will say: **“Please select (1) to call in or (2) to call out.”**

9.  **Press the (1) key to “Call In”.**

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

10.  **Press the numbers of the client’s ID.**

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

11. **Repeat step ⑩ for each additional client beyond the first.**

**Or**

 **Hang up if done.**

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

- Your Santrax ID.
- The Service ID.
- The group visit code.
- The Client is available to verify the visit.

12. **Follow steps ① thru ⑤ to 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 (2) key to “Call Out”.  
 Santrax will say: “Received at (TIME). Please enter first client ID or hang up if done.”
17.  Press the numbers of the client’s ID.  
 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.”
19.  Press the one (1) key to accept, or press the two (2) key to retry.  
 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.”
20.  Press '1' to record the client's voice.  

OR

 Press '2' if the client is unable to participate.  
*If the client is unable to participate, skip to step 25.*
21.  Hand the phone to the client and the client will be asked to state their name and today's date.  
 Santrax will say: “Please say your first and last name and today's date.”
22.  The client should say their first and last name and today's date.  
 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.”
23.  The client should press the appropriate option.  
 Santrax will say: “The service performed was (SERVICE). Press (1) to confirm, (2) to deny, (3) to replay.”
24.  The client should press the appropriate option.  
 Santrax will say: “Please enter second client ID or hang up if done.”
25. Repeat steps 17 thru 24 for each additional client beyond the first.  

Or

 Hang up if done.



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            | STX ID Verification / Playback |
| Group Visit - Yes          | CIOP                           |
| Select Service             | Client Voice Recording         |
| Client Verification: Visit | Client Verification: Service   |