

Santrax[®] Data Entry (Staff / Agency Worker)

Santrax[®] EVV[™] Solution



Santrax Data Entry (Staff / Agency Worker)

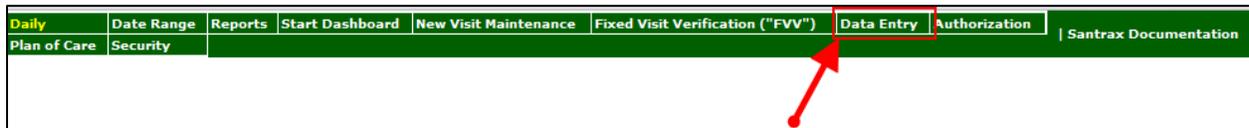
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Santrax Data Entry

For agencies that do not have a formal scheduling system, Santrax offers the **Data Entry** module. Using Data Entry, users can manually input and maintain employees (Staff / Agency Workers).

From the top menu bar, select **Data Entry**.



From this screen, employees can be created, modified or deleted.



Data Entry

Create
Modify
Delete

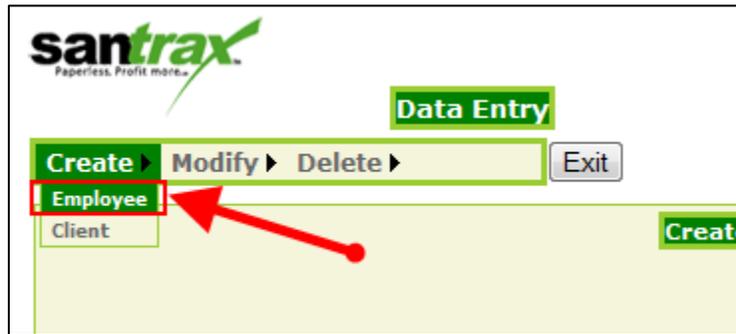
Create New Employee

(* Required fields)	
First Name	<input type="text"/> *
Last Name	<input type="text"/> *
Middle Initial	<input type="text"/>
Santrax Id	<input type="text"/> *(Maximum 9 digits)
Employee Id	<input type="text"/>
Department	<input type="text" value="v"/> or enter new department <input type="text"/>
Street Address	<input type="text"/>
Apt. No.	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="v"/>
Zip Code	<input type="text"/>
Phone	<input type="text"/>
Discipline	<input type="text"/>
Pay Rate	<input type="text"/>
GPS Phone	<input type="text"/>

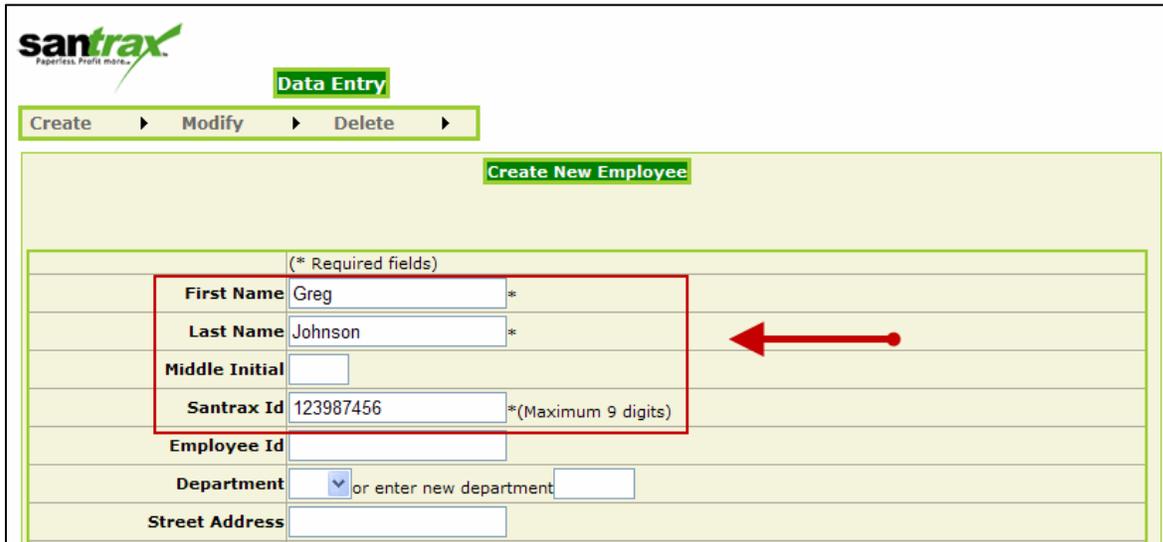
Create New Employees (Staff / Agency Workers)

- Create Employee

Move your cursor over the **Create** menu and click **Employee**.

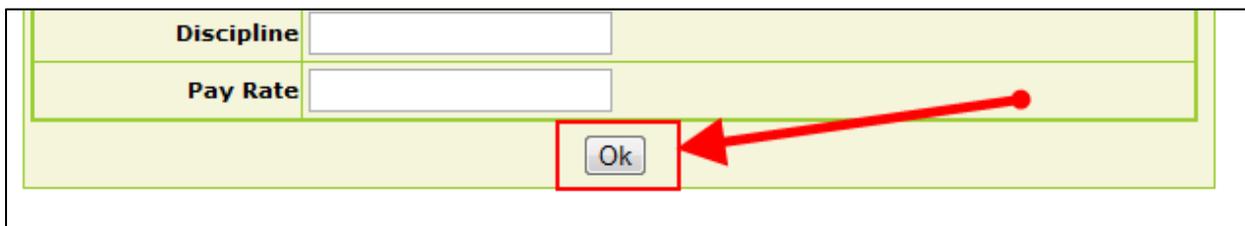


To create a new employee, the last name, first name and Santrax ID are required. Enter the information into the Create New Employee screen. Required fields are indicated with an asterisk (*) to the right of the field.



(* Required fields)	
First Name	Greg *
Last Name	Johnson *
Middle Initial	
Santrax Id	123987456 *(Maximum 9 digits)
Employee Id	
Department	▼ or enter new department
Street Address	

When finished entering information, click **OK** to save.

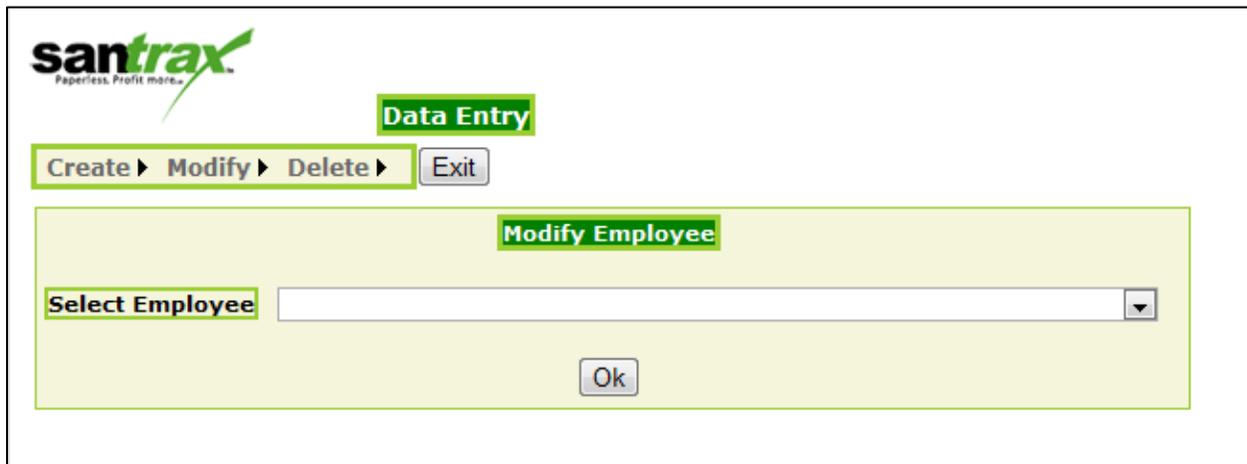


Discipline	
Pay Rate	
<input type="button" value="Ok"/>	

Modify Employee Data

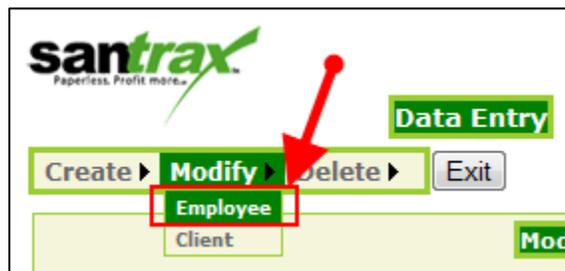
Modifying an employee will allow you to update all their information as necessary.

Any updates made for the employee will be effective from the time the change was made. The information previously available will continue to be in effect for all calls and visits prior to the change. In other words, changes are not retroactive.



- Modifying Employee's Data

Move your mouse over the **Modify** menu and click **Employee**.



Use the **Select Employee** dropdown menu to find the employee you wish to modify.



Make changes to the data fields as needed.

Modify Employee

Select Employee GREGORY, DARRYL (457150069) ▼

(* Required fields)

First Name	<input type="text" value="DARRYL"/> *
Last Name	<input type="text" value="GREGORY"/> *
Middle Initial	<input type="text"/>
Santrax Id	457150069
Employee Id	<input type="text" value="34220854490033"/>
Employee Other Id	<input type="text"/>
Employee Custom Id	<input type="text"/>
Department	<input type="text"/> ▼ or enter new department <input type="text"/>
Street Address	<input type="text" value="6123 N RAVENSWOOD A"/>
Apt. No.	<input type="text" value="APT 1"/>
City	<input type="text" value="CHICAGO"/>
State	<input type="text" value="Illinois"/> ▼
Zip Code	<input type="text" value="60660-2380"/>
Phone	<input type="text" value="7733382118"/>
Discipline	<input type="text"/>
Pay Rate	<input type="text"/>

Click **OK** to save your changes.

Pay Rate	<input type="text"/>
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Delete Employees

Use the Delete option to remove employee data from Santrax EVV going forward. Deleting an employee really doesn't delete them from the system. Any information already captured will continue to reference the employee's information. However, any new activity will *not* use any employee data that was deleted. In other words, deletion is not retroactive.

- Delete an Employee

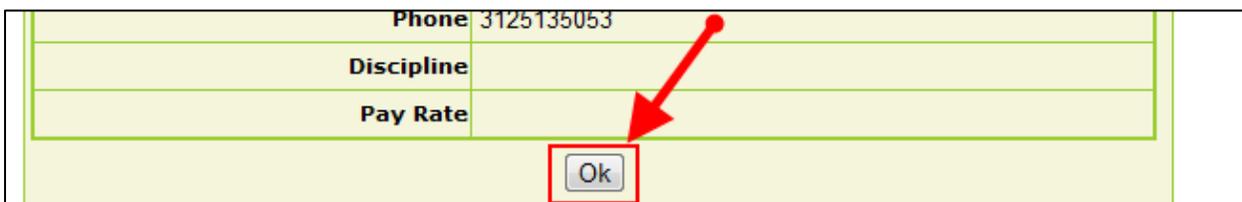
To delete an Employee, move your mouse over the **Delete** menu and click **Employee**.



Use the **Select Employee** dropdown menu to locate the employee you wish to delete.



Click **OK** to delete the employee.



A confirmation message will display.

