ILLINOIS
DEPARTMENT OF HUMAN SERVICES
ELECTRONIC VISIT VERIFICATION (EVV)

Agency Training

November 2013

Privacy Notice

Please be advised that certain data fields required by the EVV system may contain protected health information under the Health Insurance Portability and Accountability Act (HIPAA), or other personal information under the privacy laws of the state.

Employees and/or agencies who have access to such information need to take appropriate safeguards to ensure such information is not disclosed without the consent of the individual or otherwise in accordance with applicable law.

TOPICS

1. Electronic Visit Verification (EVV) Overview
2. Accessing EVV
3. Speaker Verification
4. Security
5. Call Process
6. Fixed Visit Verification (FVV) Process
7. Visit Maintenance
   - *FVV Visit Maintenance*
   - *Speaker Verification & Visit Maintenance*
8. Reports
9. Digital Dashboard
10. Next Steps

EVV OVERVIEW

Key Terminology

Please review the definition of the terms listed below in order to understand the terms used in Santrax and this presentation:

EVV: Electronic Visit Verification

Santrax: Electronic Visit Verification software name

Client: You may know the client as the *Customer*. This is the person receiving services.

Employee: You may know the employee as the *Agency Worker*. The employee is the person providing services.

Agency: You may know the agency as the *Provider*. The agency is the organization offering services.

Key Terminology

Call Process: Agency worker's call-in and call-out of Santrax

FVV: Fixed Visit Verification – process for capturing visit start and end times when customer does not have home phone

Reports: Printable visit data information

Security: The functionality to create users and assign them different levels of system access

Speaker Verification: Agency worker's recorded voice print matching

Visit Maintenance: The module where visits can be adjusted or corrected.

What you will Learn

At the end this of training session, you will leave with an understanding of:

- What is an EVV system?
- Why is state law requiring the use of EVV?
- Who is Sandata?
- When must you begin using EVV?
- Key Terminology

What is EVV?

EVV is a **telephone** and **computer-based** system that electronically documents the precise time service begins and ends.

The EVV system electronically documents:

- the customer receiving services
- the agency worker's identity
- the date of the visit
- time the agency worker begins and ends the delivery of services

Why is EVV Required?

The Illinois Department of Human Services Division of Rehabilitation Services (DHS/DRS) is implementing a new "Electronic Visit Verification" (EVV) system for its Home Services Program (HSP).

This system will help make timekeeping for individual providers, homemakers and home health care agencies faster, easier, and more accurate.

Who is Sandata

Sandata Technologies is the software vendor DHS has chosen as the provider of the EVV system. Learn more at www.sandata.com

Sandata will provide each Agency with the following:

- Computer-based Santrax EVV account
- Specific toll-free numbers to capture agency worker calls
- Training materials and user guides
- Current and historical data about visits, stored safely on Sandata servers

When does EVV start?

All Homemaker and Home Health Agencies providing services to customers of the DHS/DRS Home Services Program are required to use the EVV system.

The EVV system GO LIVE date is **January 1st, 2014**

ACCESSING EVV

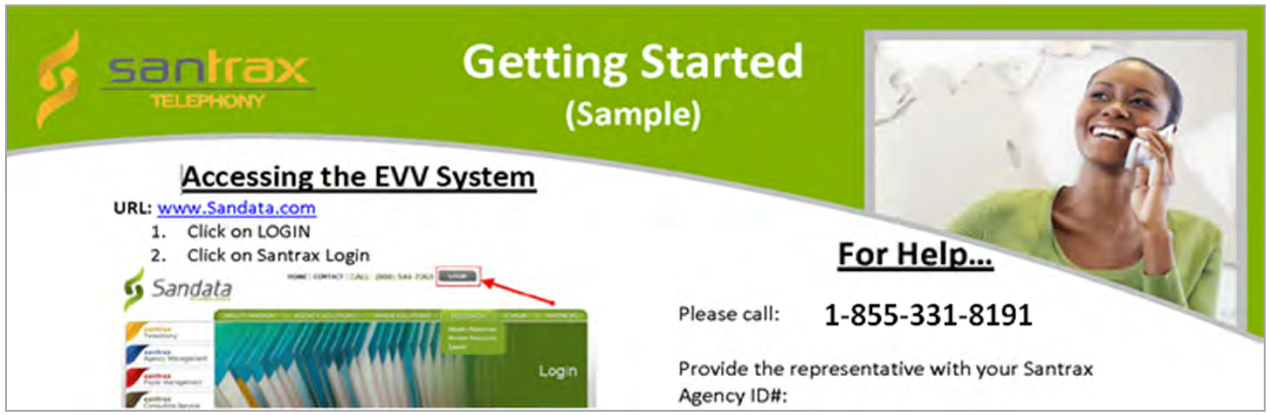
What's covered in this section

- How to access and Login to Santrax
- Logging in for the first time
- Basic Homepage Navigation
- Where to find user documentation
- Q & A

Getting Started Documentation

After completing training:

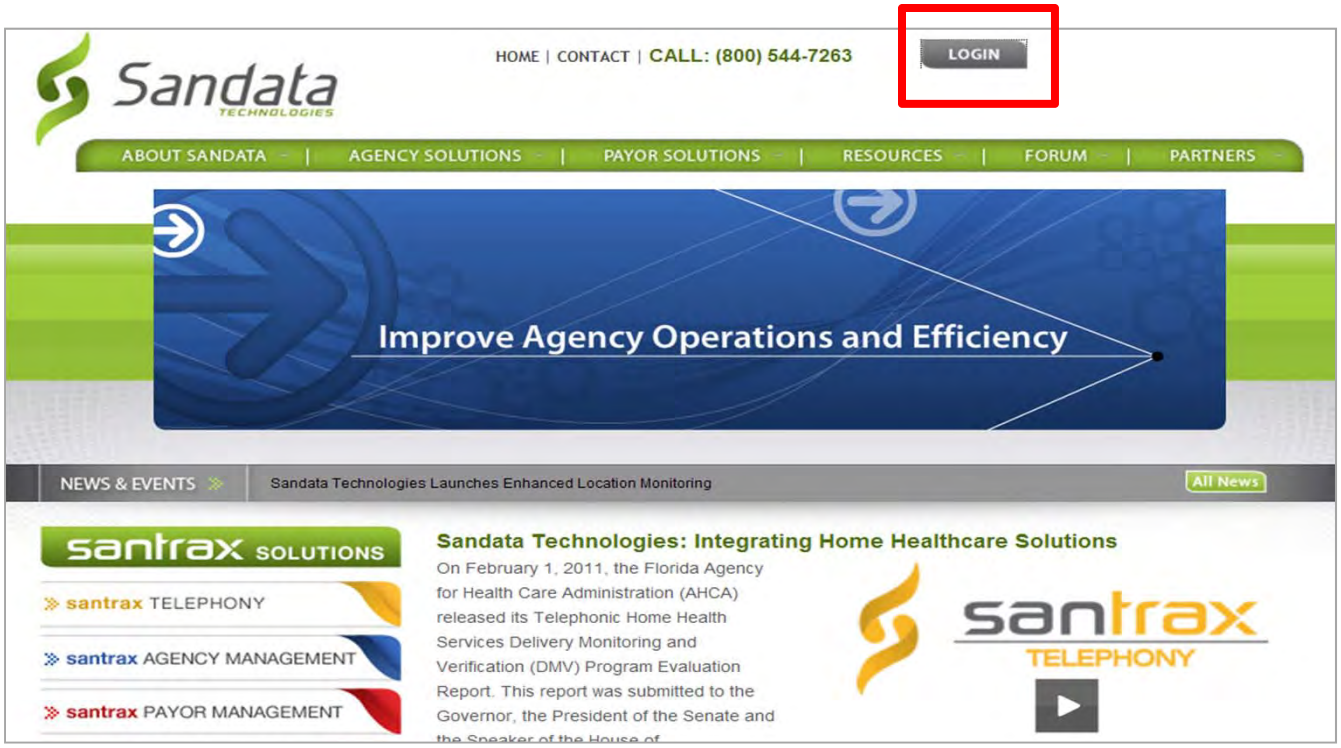
- Sandata emails a Getting Started document to the Agency administrator identified in the Outreach survey. Information includes:
  - Agency Account ID
  - Username and Password
  - How to Access Santrax training documentation
  - Sandata Technologies toll-free phone number



Log In Process

From a web browser (Internet Explorer, Firefox), go to the website: www.sandata.com

Click the **Login** button in the upper right hand corner



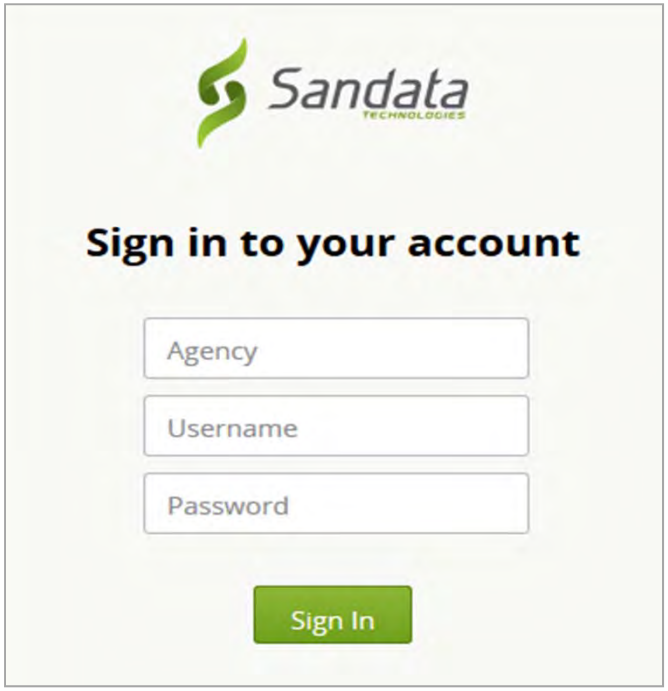
Log In Process

Click the **Santrax Login** link

Log In Process

Enter the Agency Number, the Username and Password provided by Sandata, then select **Sign In.**

Note: Usernames and passwords are not case sensitive. For security purposes, login information should never be shared.



Setting Your Password

- The first time you login to Santrax, you will be prompted to change your password.
- Passwords must be at least six (6) characters long, begin with a letter and contain at least one number.

Homepage & Menu Bar

Reports | Exports | Start Dashboard | New Visit Maintenance | Authorization | Plan of Care | Security | Santrax Documentation

Santrax v7.12

Select Report

Report Type: Daily Reports

Report Name: Daily Call Listing

Select Timeframe

From: 11/04/2013 00:00

To: 11/04/2013 23:59

Select Parameters

Contract: All

Program: All

Service: All

Client: All

Client AR#: All

Supervisor: All

Department: All

Employee: All

Order Sequence

Run Report

Last transfer files received
None

Last transfer files processed
None

Last reject files processed
None

Exit

The Menu Bar displays all options available to the person logging in based on their security rights.

The Daily Reports menu is displayed by default.

Santrax Universal Documentation

Reports | Exports | Start Dashboard | New Visit Maintenance | Authorization | Plan of Care | Security | Santrax Documentation

Santrax v7.12

Select Report

Report Type: Daily Reports

Report Name: Daily Call Listing

Select Timeframe

From: 11/04/2013 00:00

To: 11/04/2013 23:59

Select Parameters

Contract: All

Program: All

Service: All

Client: All

Client AR#: All

Supervisor: All

Department: All

Employee: All

Order Sequence:

Run Report

Last transfer files received
None

Last transfer files processed
None

Last reject files processed
None

Exit

Access Santrax Universal Documentation for all users as shown above

The link contains searchable manuals, release notes and quick reference guides

Exercise

Log in and navigation

Questions

Sandata TECHNOLOGIES

SECURITY

What's covered in this section

- Key Terminology
- How to access the Security module
- How to create a new user
- How to modify an existing user's settings
- Available Security Roles
- Q & A

KEY TERMINOLOGY

- **Security** – the area in Santrax where you go to set up your staff to use the system and update staff information and privileges.
- **Security Administrator** – the person at the agency with the ability to create new users in the system and change/reset passwords.
- **User** – a person with an unique login and password to the system
- **Role** – a group of privileges (permissions) which allow a user to perform certain tasks
- **Privilege** – a single permission

General Setup

Sandata emails the Getting Started document with agency-specific login information.

We recommend each agency have a Security Administrator responsible for:

- Overseeing the Santrax account and managing users
- Setting up and providing login credentials for internal administrative users including creating, modifying and deleting users
- Providing security access to all users

Note: All users of Santrax should be set up as individual users with their own unique login credentials.

Accessing the Security Module

Access the Security module from the Santrax menu bar.

- This tab is only seen when logged in using the Security Administrator login and password.
  - Clicking the Security tab once, provides access to Security specific reports.
  - Clicking the Security tab twice, provides access to creating, modifying and deleting roles and users.

Security Edit Screen

Reports | Exports | Start Dashboard | New Visit Maintenance | Authorization | Plan of Care | Security | Santrax Documentation

Users: Create | Modify | Delete
Roles
Modify: Passwords Expire in 365 Days
First Alert Settings
Exit: Santrax

Username: OK
Last Name (Optional):
First Name (Optional):
Password:
Retype Password:
Santrax ID: (at least -1 digits terminated in #)
Work Schedule: DEFAULT Setup User Contact Info
Lock:

Roles
DAILY
DATE RANGE
VM_VIEW
VM_UPDATE
AR_VIEW
AR_UPDATE
POC_VIEW
POC_UPDATE

Assigned Roles
End of List

Privileges
Start Employee 'Speaker Verification' system (SV)
Record Employee 'Speaker Verification' message via the phone (SV)
Start Client 'Speaker Verification' system (SV_CLIENT)
Record Client 'Speaker Verification' message via the phone (SV_CLIENT)
Run DAILY reports (REPORTS)
Run reports (REPORTS)

Security Administrator sets up a new user by clicking on the Security tab **twice** to access the create/modify users screen.

Security Roles

Role	Abilities
Security Administrator	Each Santrax system will have an assigned Security Administrator that will manage and administer the Santrax System. They also have all Santrax capabilities as noted below: • Create/Manage all Santrax Users • Start Security application • Data Process • Visit Maintenance (edit visits) • Individual Provider updates • Customer updates • Scheduling functions • Reporting • Payroll activity
Coordinator	The coordinator is a Santrax administrative generalist that supports a variety of Santrax activities, including: • Data Process • Visit Maintenance (edit visits) • Individual Provider updates • Customer updates • Scheduling functions • Reporting • Payroll Support

Security Roles

Role	Abilities
Assistant Coordinator	The assistant coordinator supports the following: • View only Visit Maintenance (can view issues but cannot edit) • Reporting
Payroll Specialist	The payroll specialist supports the payroll process as: • View Santrax system, including Visit Maintenance (can view issues but cannot edit) • Payroll Reporting
Billing Specialist	The billing specialists supports billing specific Santrax function, including: • View Santrax system, including Visit Maintenance (can view issues but cannot edit) • Data Process • Reporting

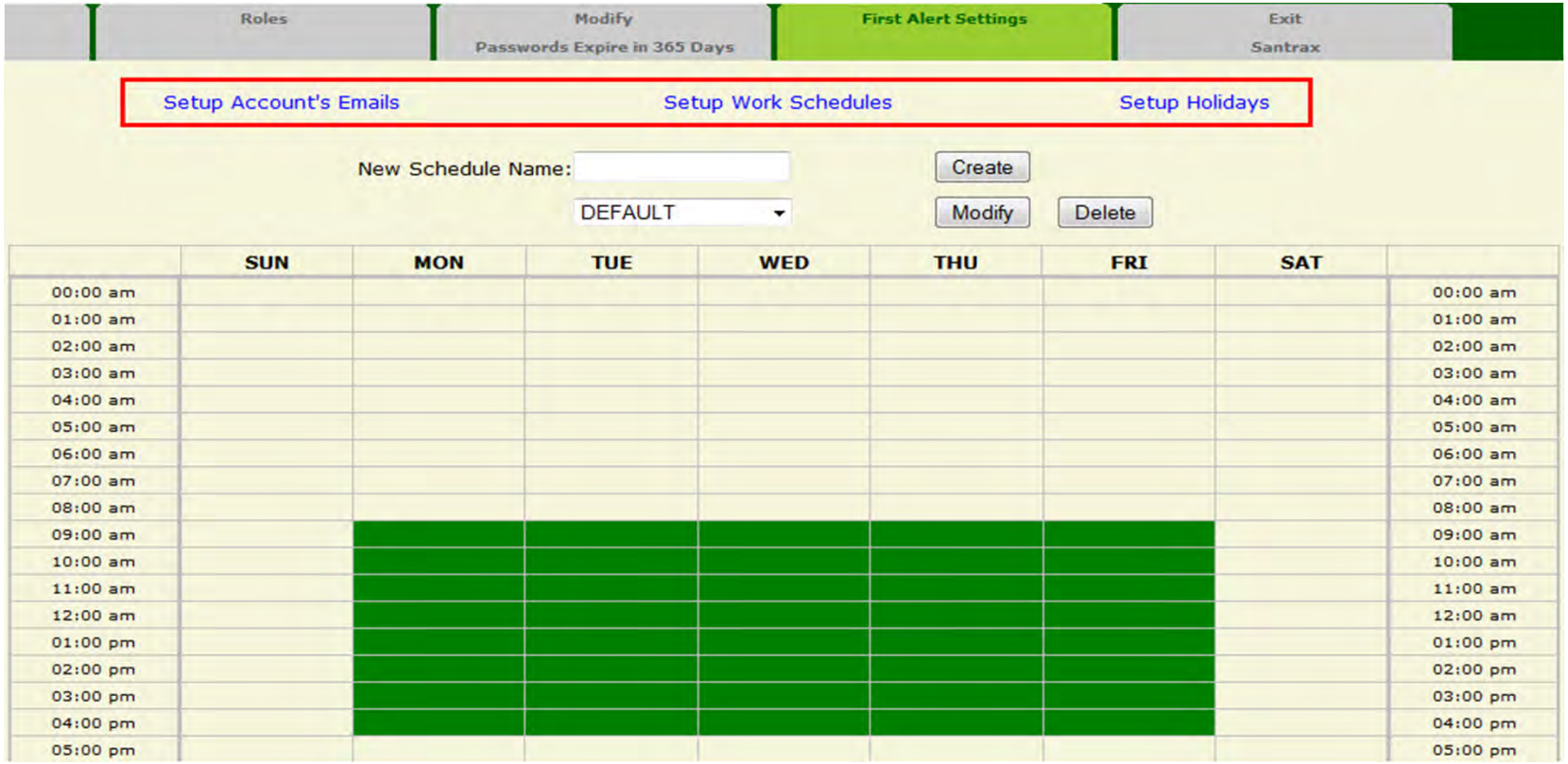
First Alert

Automatically alerts designated agency staff when a scheduled visit missing.

- There are three alert level settings
  - Initial alert is sent if a call has not been received from the customer's home within 5 minutes of scheduled start time
  - Second alert is sent if a call has not been received from the customer's home within 10 minutes of scheduled start time
  - Third alert is sent if a call has not been received from the customer's home within 50 minutes of scheduled start time
- There are three types of Alerts available
  - Email
  - Text
  - Phone call

Alert Schedules

- **Setup Account's Emails** – Define Alert contacts for the system default schedule
- **Setup Work Schedules** - Define schedule hours for when alerts should be sent
- **Set Holidays** – Define your agency holidays



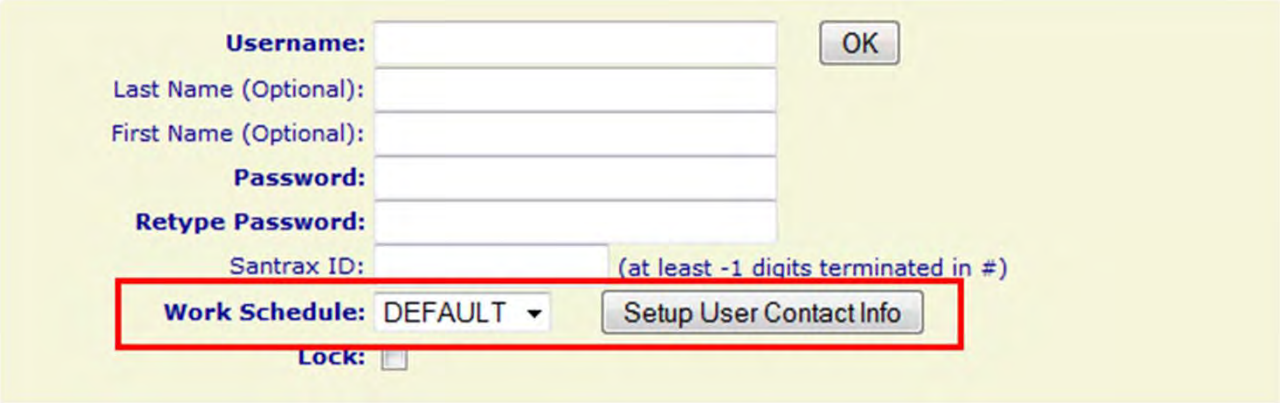
Alert Contact Info

Contact Types	Contact	Enabled	Active at business Hours	Active at non-business Hours	Memo	
Office e-mail		☐	☐	☐		Create / Send Test Message

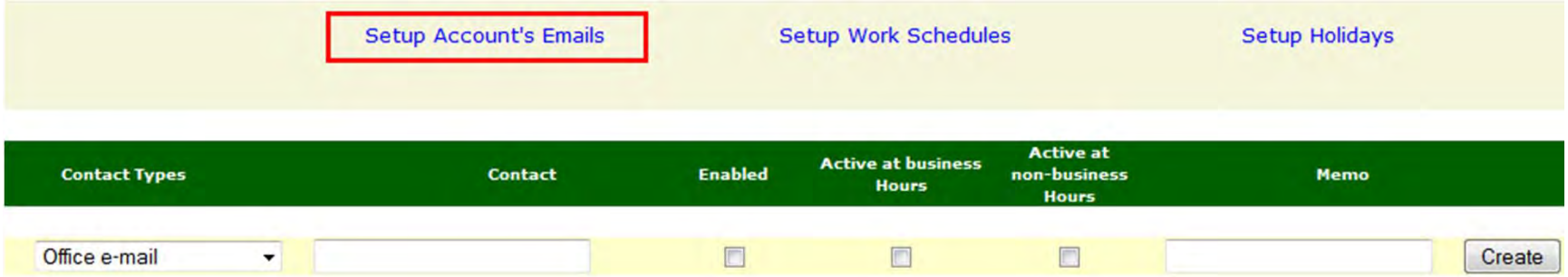
- **Contact Type**: Specify the method of contact; email, text or outbound call.
- **Contact**: Contact information based on selected contact method. (Ex: If selected method is email is selected, enter email address)
- **Enabled**: If checked, alerts will be sent to this contact
- **Active at business Hours**: If checked, contact will only receive alerts during the standard 9 - 5 business hours
- **Active at Non-business Hours**: If checked contact will receive alerts during non-business hours
- **Memo**: Free text field for short comments

Alert Assignment Options

- Set contacts to use a customized work schedule by specifying the schedule and contact info under the user profile



- Set contacts to use the system default work schedule under the First Alert Settings tab



Text Formats

Text alert formats

Verizon: xxxxxxxxxx@vtext.com
AT&T: xxxxxxxxxx@txt.att.net
Sprint: xxxxxxxxxx@messaging.sprintpcs.com
T-Mobile: xxxxxxxxxx@tmomail.net
Nextel: xxxxxxxxxx@messaging.nextel.com
Cingular: xxxxxxxxxx@cingularme.com
Virgin Mobile: xxxxxxxxxx@vmobl.com
Alltel: xxxxxxxxxx@message.alltel.com
CellularOne: xxxxxxxxxx@mobile.celloneusa.com
Omnipoint: xxxxxxxxxx@omnipointpcs.com
Qwest: xxxxxxxxxx@qwestmp.com

Exercise

- Creating a New User
- Editing an existing User
- Deleting an account

Questions

CALL PROCESS

What's covered in this section

- Key Terminology
- About the Call
- Toll Free Call Numbers and Call Reference Guides
- Call Process
- Verification at Call Time
- Helpful Hints and Troubleshooting
- Demonstration
- Q & A

Key Terminology

Telephony: Using telephone technology to identify the caller, call location and electronically document the time of a call

Santrax ID: A unique four to nine digit number determined by the agency and entered by the agency worker during the Santrax call.

- Social Security numbers are NOT recommended.

Client ID: A unique number determined by the agency and assigned to each customer.

Speaker Verification: An additional method of identifying the agency worker on the Santrax call. Santrax matches the phrase spoken during the call against the recorded phrase.

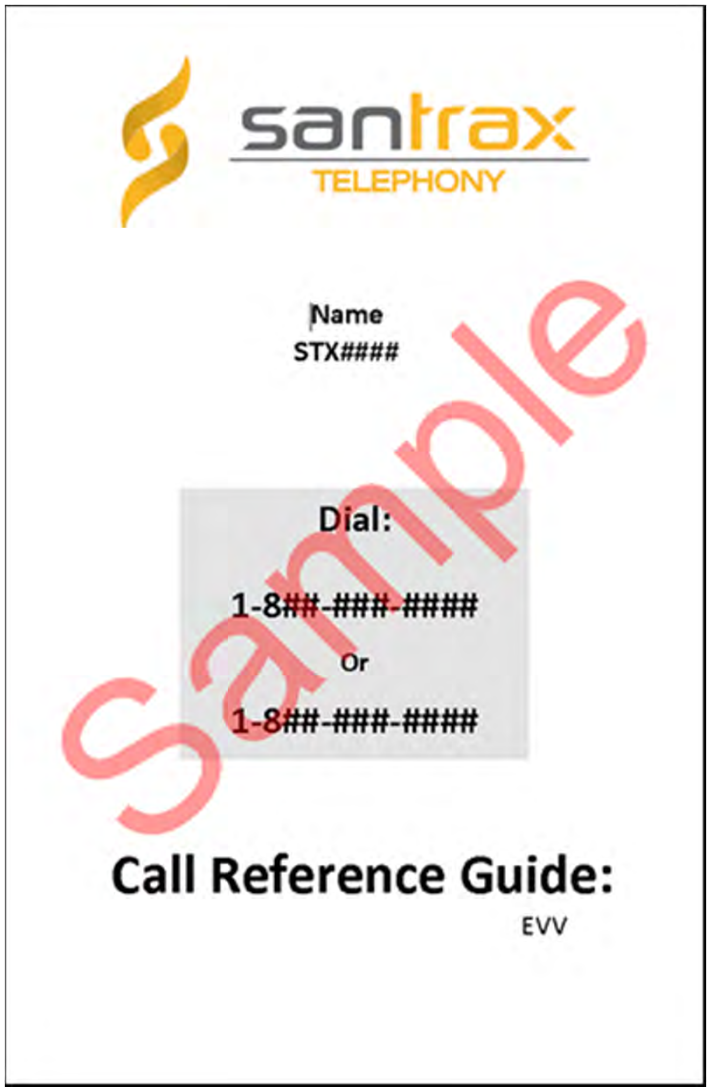
About the call

What is captured on a standard Santrax call?

- Customer name – based on phone number call originated from
- Agency Worker's name – based on the Santrax ID entered during the call
- Visit Start and End – based on call times

The agency worker must call from the customer's home phone or government issued phone. If these options are not available, the customer's cell phone may be used.

Call Reference Guide



Each agency is assigned a unique Santrax account number and given an agency specific Call Reference Guide (CRG).

Sandata provides your agency with two toll-free English numbers and one Spanish number to ensure continuous service.

Call Reference Guide and related account materials will be provided after completion of training.

Call Reference Guide

Calling Instructions — STX IL-DHS

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 an English toll-free line, speak 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.**

   Santrax will say: **"Welcome, please enter your Santrax ID."**

   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.

2. **Press the numbers of your Santrax ID on the touch tone phone.**

   If you are calling from one of your English toll-free lines, you also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.

   Santrax will say: **"To verify your identity, please repeat: At Santrax, my voice is my password"**

   NOTE: *If you have not been enrolled in Speaker Verification, Santrax will skip this prompt. If this is the case, skip step 3, and then continue.*

3. **Say "At Santrax, my voice is my password"**

   The Santrax system may ask you to repeat the phrase several times before verifying your identity.

   Santrax will say: **"Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."**

   If this is an FVV Call, press the star (*) key and refer to the FVV Call Reference Guide for detailed instruction for the FVV call process. If this is not an FVV call, press pound (#) and continue.

4. **Press the pound (#) key to continue.**

   Santrax will say: **"Thank you, bye."**

5. **Hang up.**

Calling Instructions — STX IL-DHS

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

- Your Santrax ID.

Remember: When speaking to Santrax on an English toll-free line, speak 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.**

   Santrax will say: **"Welcome, please enter your Santrax ID."**

   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.

2. **Press the numbers of your Santrax ID on the touch tone phone.**

   If you are calling from one of your English toll-free lines, you also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.

   Santrax will say: **"To verify your identity, please repeat: At Santrax, my voice is my password"**

   NOTE: *If you have not been enrolled in Speaker Verification, Santrax will skip this prompt. If this is the case, skip step 3, and then continue.*

3. **Say "At Santrax, my voice is my password"**

   The Santrax system may ask you to repeat the phrase several times before verifying your identity.

   Santrax will say: **"Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."**

   If this is an FVV Call, press the star (*) key and refer to the FVV Call Reference Guide for detailed instruction for the FVV call process. If this is not an FVV call, press pound (#) and continue.

4. **Press the pound (#) key to continue.**

   Santrax will say: **"Thank you, bye."**

5. **Hang up.**

Call Process

1. Upon arriving and before leaving the Customer's home, the agency worker calls the Santrax toll-free phone number

2. The agency worker enters their Santrax ID using the phone's keypad

3. The agency worker speaks their recorded voiceprint phrase: *"At Santrax, my voice is my password."*
4. Santrax will confirm the call time and prompt to press the * key for a Fixed Verification Visit or press # to continue
5. The agency worker will press # and hang up.

Call Process
Helpful Hints

Pulse or Rotary Phone?

(Not touch-tone phone)

Speak the Santrax ID

(English toll-free numbers only).

Busy Signal?

Use the other toll free number.

No answer? ID not recognized?

Make sure you dialed the right number.

Call again.

If there are still problems, the agency worker should call their agency.

Feature Demo

Importance of Training

The call to Santrax is the key piece of data. The more accurate and consistent the agency worker is in making their Santrax calls, the better the agency data.

Take the time to train the agency worker properly on the call process and there will be fewer corrections needed afterwards.

Questions

SPEAKER VERIFICATION

What's covered in this section

- What Is Speaker Verification
- How Does It Work
- What it Does During Call Process

What is Speaker Verification

Speaker Verification captures the agency worker's voiceprint on the Santrax call and compares it to a pre-recorded voiceprint to help agencies ensure the customer is receiving the proper services:

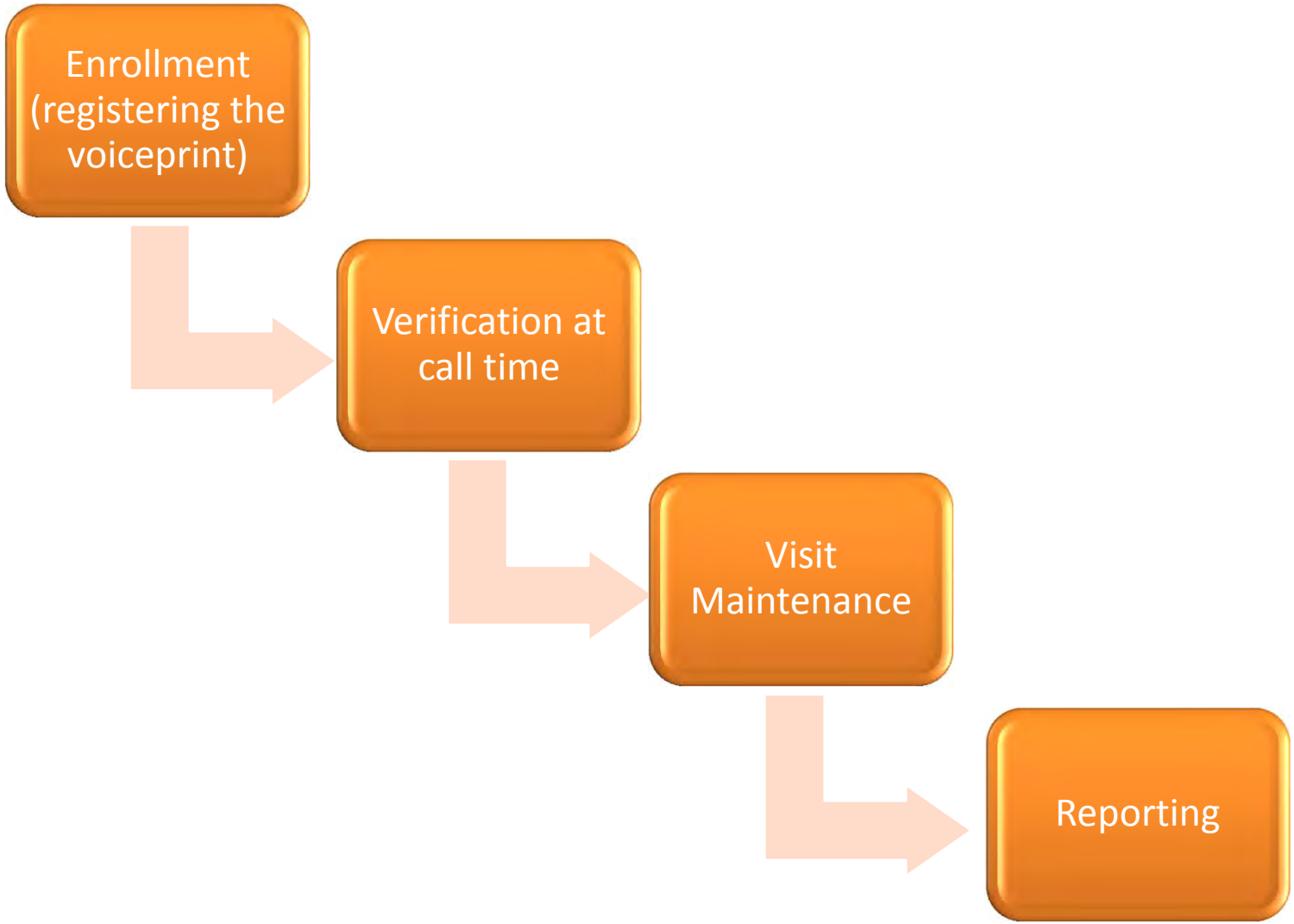
✓ **Right Employee**

✓ **Right customer**

✓ **Right Service**

✓ **Right Time**

How Does It Work?



What Speaker Verification does during the call

- Voiceprint on the call is compared to baseline
- Santrax generates score from 0 to 100%
  - Scores < 69% : fails verification
  - Scores ≥ 70% : passes verification
- If the agency worker does not pass the verification, Santrax will prompt them to repeat the phrase again
- Agency worker is given up to 3 attempts to pass
- If the agency worker does not pass, the system saves the call and marks it as a failed verification
  - Agencies can follow up on failed voice verifications, using standard reporting

SPEAKER VERIFICATION ENROLLMENT PROCESS

What's covered in this section

- Enrollment Guidelines
- Supervisor Enrollment
- Employee Enrollment
- Confirming Enrollment
- Q & A

Enrollment Guidelines

- Agency Supervisors must enroll themselves first
- Agency Supervisors must enroll all employees
- To ensure optimal conditions for speaker verification:
  - Speak clearly
  - Speak at your normal pace
  - Speak in your normal voice
  - Use the handset when making the call
  - Try to avoid noisy environments

Registering Supervisors

Supervisors should be set up in Santrax as a User before enrolling in Speaker Verification

To set up a supervisor:

1. From the Santrax menu bar, click on the Security tab twice
2. Enter all required fields (**in bold**)
3. Enter the supervisor's Santrax ID with a pound symbol (#) at the end. Example: 12345678#
4. Select the SV_EMP_ADMIN_ROLE under the Roles assignment box.

Supervisor Enrollment

1. Dial the toll free number assigned to your agency.
2. Enter your supervisor ID
3. Press 2 to indicate that you will be enrolling your voice.
4. Santrax will advise you that you are about to begin the enrollment process. In order to register your voiceprint, you will be asked to repeat a very simple phrase 3 times: **"At Santrax my voice is my password"**
5. Hang up

Agency Worker Enrollment

1. The Supervisor must call the toll free number assigned to your agency.
2. Supervisor enters their Supervisor ID, followed by the pound (#) key
3. Supervisor presses 2 to start the enrollment process.
4. Santrax will ask the supervisor to verify his identity repeating “At Santrax, my voice is my password”. Santrax Speaker Verification will verify the voiceprint of the supervisor.
5. The Supervisor must then enter the Santrax ID of the employee being enrolled.
5. The Supervisor now hands the phone to the agency worker. The system will ask the agency worker to record his voiceprint by repeating: “At Santrax, my voice is my password”. This will be repeated 3 times.
6. Once the agency worker has been successfully enrolled, they press the pound (#) key to perform a test call.
7. The supervisor will be able to verify the result of the test call by pressing 1 and reviewing the results of the test call.
8. Hang up to conclude the enrollment process or press 3 to enroll another agency worker

Confirming Enrollment

Agency Worker enrollment can be confirmed by running:

- The Employee Listing Report
- The Speaker Verification Enrollment Status Report

Note: It is important to review either of the above reports immediately after enrolling an agency worker, before he or she leaves the office, to ensure they were successfully enrolled.

Questions

FVV CALLS

What's covered in this section

- What is FVV
- Obtaining the values
- Making the Santrax Call and entering the values
- Troubleshooting FVV Calls
- Q & A

What is FVV

Fixed Visit Verification is a way of capturing an agency worker's start and end times for a visit when the customer receiving service does not have a home phone, government issued phone, cell phone or does not allow the agency worker to user their phone.

What is FVV

- The FVV Device provides a 6 digit value when pressed
- The value represents the date and time it was pressed
- The agency worker presses the FVV upon arrival and before leaving the customer's home
- The two values represent the call-in and call-out times
- The agency worker may call Santrax 15 minutes after the visit, from any phone to enter the two 6 digit values for that customer visit.

Obtaining the Values

Start of Visit

- Press and release either button on FVV
- Write down the six digit value. This represents the call in time

End of Visit

- Press and release either button on FVV
- Write down the six digit value. This represents the call out time.

**** Note: If they need to see the number again, they may press and release any button again to display the reading.***

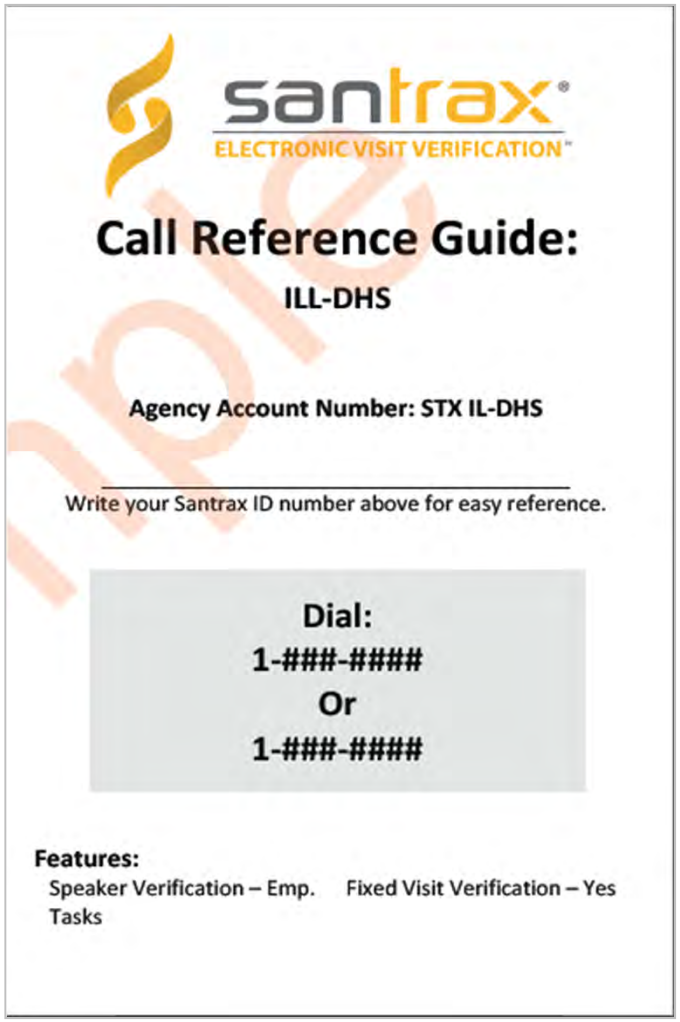
FVV Call Process Introduction

Wait 15 minutes after obtaining the second FVV value before making the Santrax call.

Before calling, the agency worker should have the following information:

- His or her Santrax ID.
- The Client ID.
- First six-digit visit verification number, date and time of arrival (obtained at the beginning of the visit).
- Second six-digit visit verification number, date and time of departure (obtained at the end of the visit).

Making The FVV Call



santrax®
ELECTRONIC VISIT VERIFICATION™

Call Reference Guide:

ILL-DHS

Agency Account Number: STX IL-DHS

Write your Santrax ID number above for easy reference.

Dial:
1-###-####
Or
1-###-####

Features:
Speaker Verification – Emp. Fixed Visit Verification – Yes
Tasks

1. Call the toll free number
2. Enter your Santrax ID
3. Speak the voiceprint phrase
4. Press the star (*) key
5. Enter the Client ID of the customer receiving services
6. Enter the 1st FVV value
7. Press the pound (#) key to continue
8. Enter the 2nd FVV value
9. Press the pound (#) key to continue
10. Hang up

FVV Call Reference Guide

Calling Instructions — STX IL-DHS

Upon Arrival:
When you arrive at the client's home, press and release either of the buttons on the FVV Device and write down the First six-digit visit verification number displayed on the device's screen, as you will use this number later to make your Santrax call. Note the date and time you pushed the button.

Before Departing:
At the end of the visit, press and release either of the buttons on the FVV Device and write down the Second six-digit visit verification number displayed on the device's screen, as you will use this number later to make your Santrax call. Note the date and time you pushed the button.

NOTE: If you need to see the number again right away, you may press and release the button one more time to display the reading. If you get a different number, that's ok, use the new number.

Do not hold the button down, always press and release.

Before calling into Santrax, make sure you have the following information:

- ✓ Your Santrax ID
- ✓ The Client's ID
- ✓ First Six-digit visit verification number representing the date and time of arrival (obtained at the beginning of the visit).
- ✓ Second Six-digit visit verification number representing the date and time of departure (obtained at the end of the visit).

Once you have this information, you are ready to call into Santrax!

NOTE:

- Do not call into Santrax until at least 15 minutes after you receive the second six-digit number at the end of your visit.
- Both of the six-digit visit verification numbers will be entered on a single Santrax call.

1. **Dial any of the toll-free numbers assigned to your agency.**

   Santrax will say: **"Welcome, please enter your Santrax ID."**

   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.

2. **Press the numbers of your Santrax ID on the touch tone phone.**

   If you are calling from one of your English toll-free lines, you also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.

   Santrax will say: **"To verify your identity, please repeat: At Santrax, my voice is my password"**

3. **Say "At Santrax, my voice is my password"**

   The Santrax system may ask you to repeat the phrase several times before verifying your identity.

   Santrax will say: **"Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."**

4. **Press the star (*) key.**

   Santrax will say: **"Please enter first Client ID."**

Calling Instructions — STX IL-DHS

5. **Enter the Client ID.**

   Once the Client ID is entered correctly, Santrax will say: **"Please enter your first visit verification number or press the pound (#) key to continue."**

6. **Enter the first visit verification number.**

   This is the first six-digit number you obtained from the FVV Device when you arrived at the client's home and will represent your time in.

   When the visit verification number is entered correctly Santrax will confirm it by saying: **"The first visit verification number is (DATE/TIME). If this is incorrect, press 1 to retry or press the pound (#) key to continue."**

   NOTE: Listen to check that the date and time provided are the same as the date and time the button on the device was pushed. If they don't match, an incorrect visit verification number may have been entered. Press 1 to re-enter the number.

7. **Press the pound (#) key to continue.**

   Santrax will say: **"Please enter your second visit verification number or press pound (#) to continue."**

8. **Enter the second visit verification number.**

   This is the second six-digit number you obtained from the FVV Device at the end of the visit. It will represent your time out.

   When the visit verification number is entered correctly, Santrax will confirm it by saying: **"The second visit verification number is (DATE/TIME). If this is incorrect, press 1 to retry or press the pound (#) key to continue."**

9. **Press the pound (#) key to continue.**

   Santrax will say, **"Enter number of tasks"**

10. **Press the total number of tasks performed for the client.**

    Santrax will say, **"Enter task ID"**

11. **Press the Task Number you performed.**

    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.*

    Santrax will say: **"You entered (NUMBER) task(s)."**

12. **Hang up.**

Sample

FVV Call

- Making an FVV Call

Feature Demo

FVV Troubleshooting: Invalid Client ID

If the agency worker incorrectly enters a Client ID, Santrax will say "No FVV registered, please re-enter the Client ID or press the pound key to continue."

- re-enter the correct Client ID
- continue with the FVV call

If the agency worker still has trouble with the Client ID they should:

- hang up and try the call again
- contact you for the correct Client ID, then try the call again.

FVV Troubleshooting: Incorrect FVV Value

If the agency worker incorrectly enters the FVV value,

- Santrax says **"Invalid visit verification number, please try again."**

The agency worker should:

- Press 1 to re-enter the correct FVV number and then will be prompted to continue the FVV call
- Call your agency office if they continue to receive an error message

FVV Troubleshooting: No FVV Numbers Entered

Santrax says **"You have not entered any visit verification numbers, press one to return or press the pound key to continue"**

- If the (*) key was accidentally pressed and the call is not a FVV call, the agency worker should hang up
- If the FVV value is known, the agency worker should re-enter the correct number
- If FVV numbers are unknown, the agency worker should hang up and call the office to report the problem so the visit can be manually corrected

Questions

VISIT MAINTENANCE

What's covered in this section

- What is Visit Maintenance
- Key Terminology
- Accessing Visit Maintenance
- Understanding Search, Filter and Sort Options
- Identifying and Correcting Exceptions
- Confirming Pay Hours
- Manually adjusting/creating schedules
- Entering Memo and Reason codes

What is Visit Maintenance?

Visit Maintenance displays the visit information, comparing schedules against the actual call times, calculating the hours worked and highlighting any information that requires review.

It is also the area in Santrax where a user can make adjustments/corrections if necessary.

Adjustments/corrections include:

- Correcting a call for a visit made from an unrecognized phone number
- Correcting when an agency worker enters their Santrax ID incorrectly
- Confirming the correct hours worked when Santrax warns that the worked hours was more/less than scheduled

** *Remember to still obtain customer certifications as these need to be retained for DHS auditing purposes*.

Key Terminology

Exceptions: any visit data which Santrax has highlighted in red because it is missing or unidentified

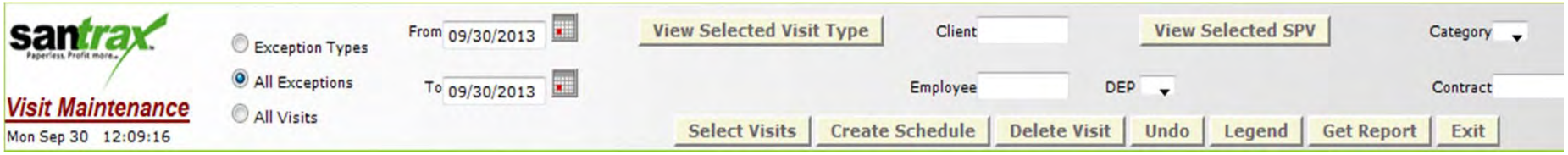
Merging a call: taking a single call time and assigning it to a visit as the start or end time, to complete the visit

Reason code: a pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance

Accessing Visit Maintenance

- Accessed using the New Visit Maintenance tab at the top of the Santrax homepage.
- Opens in a separate window.
- Pop-Up blockers must be disabled.
- For security purposes, Visit Maintenance sessions time out after 15 minutes of non-activity
- Visit Maintenance is supported by Internet Explore 9.0 or higher and Firefox 18 or higher

Filter, Search, Sort Options



Filter Options

- Date Range
- Exception Types, All Exceptions, All Visits

Search Options

- View Selected Visit Type
- Client ID or Name
- Employee ID or Name
- View Selected SPV
- Dept., Category, Contract *(if info is provided by client)*

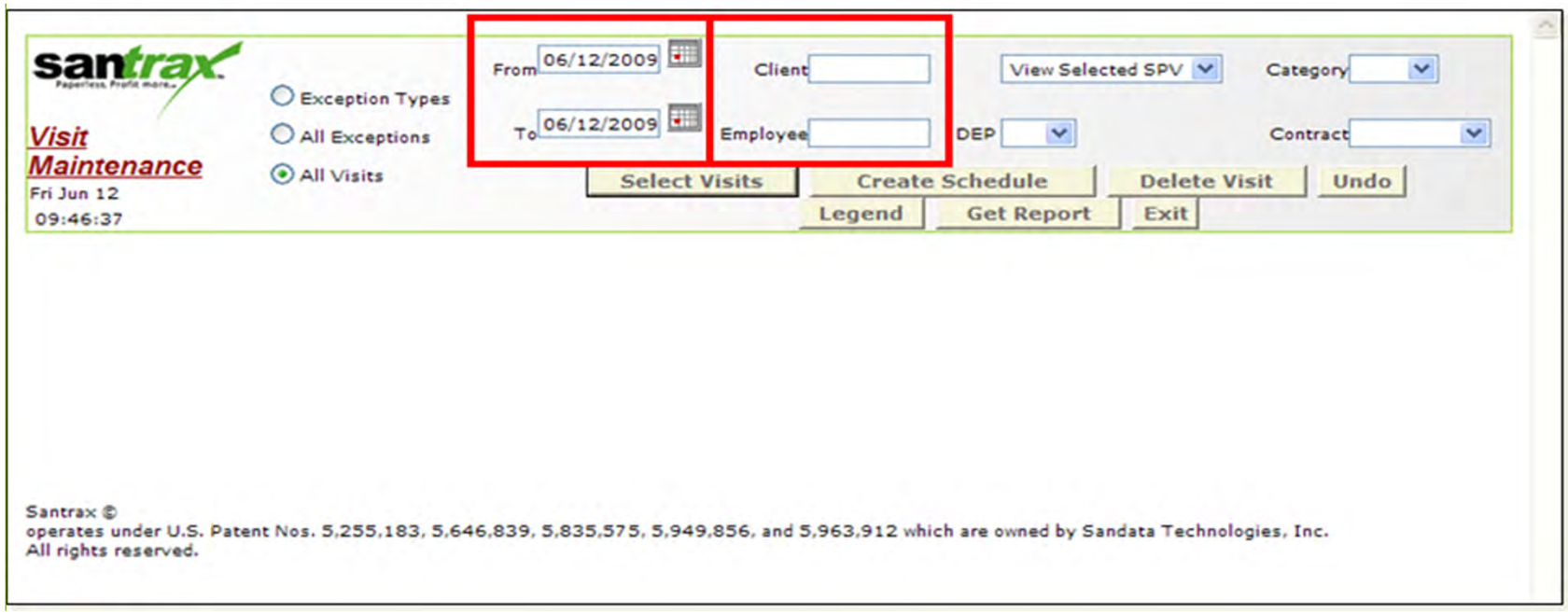
Sort Options *(available by hovering over the Select Visits button)*

- Client, Employee, Date, Schedule Times, Call Times, Hours, Codes and Tasks

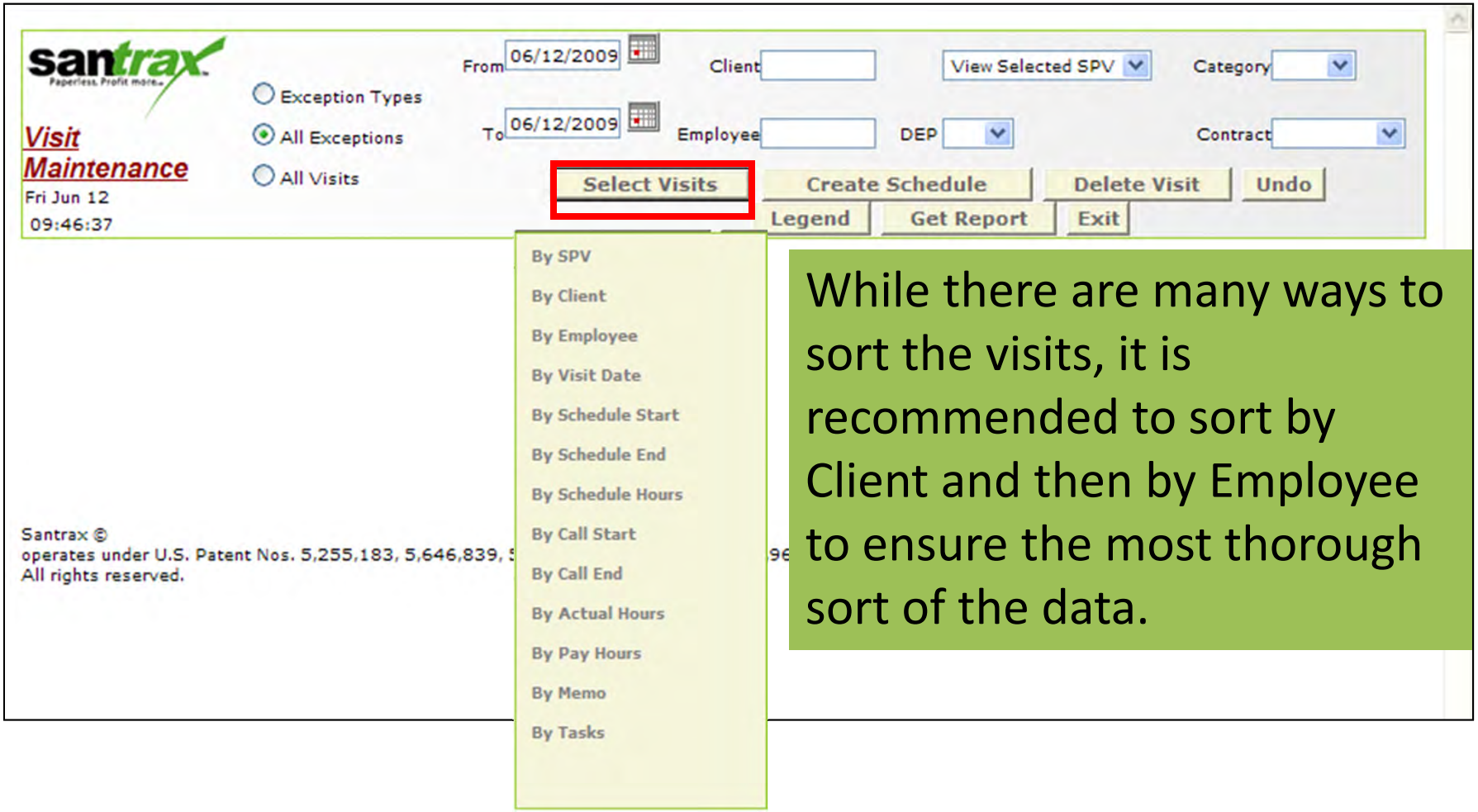
Visit Maintenance: Selecting by Date Range

Date range to select your visits

Leave blank for all or enter a specific name



Visit Maintenance: Sorting Data



While there are many ways to sort the visits, it is recommended to sort by Client and then by Employee to ensure the most thorough sort of the data.

Visit Maintenance: Tool Tips

Move your mouse over the name of an Employee to display the Santrax ID as entered in Santrax.

Move your mouse over the name of an individual to display the Client ID and Phone Number.

Visit Data

santrax

Visit Maintenance

Fri Oct 4 4:19:57

Exception Types
All Exceptions
All Visits

From 01/01/2013
To 01/10/2013

View Selected Visit Type | Client | View Selected SPV | Category

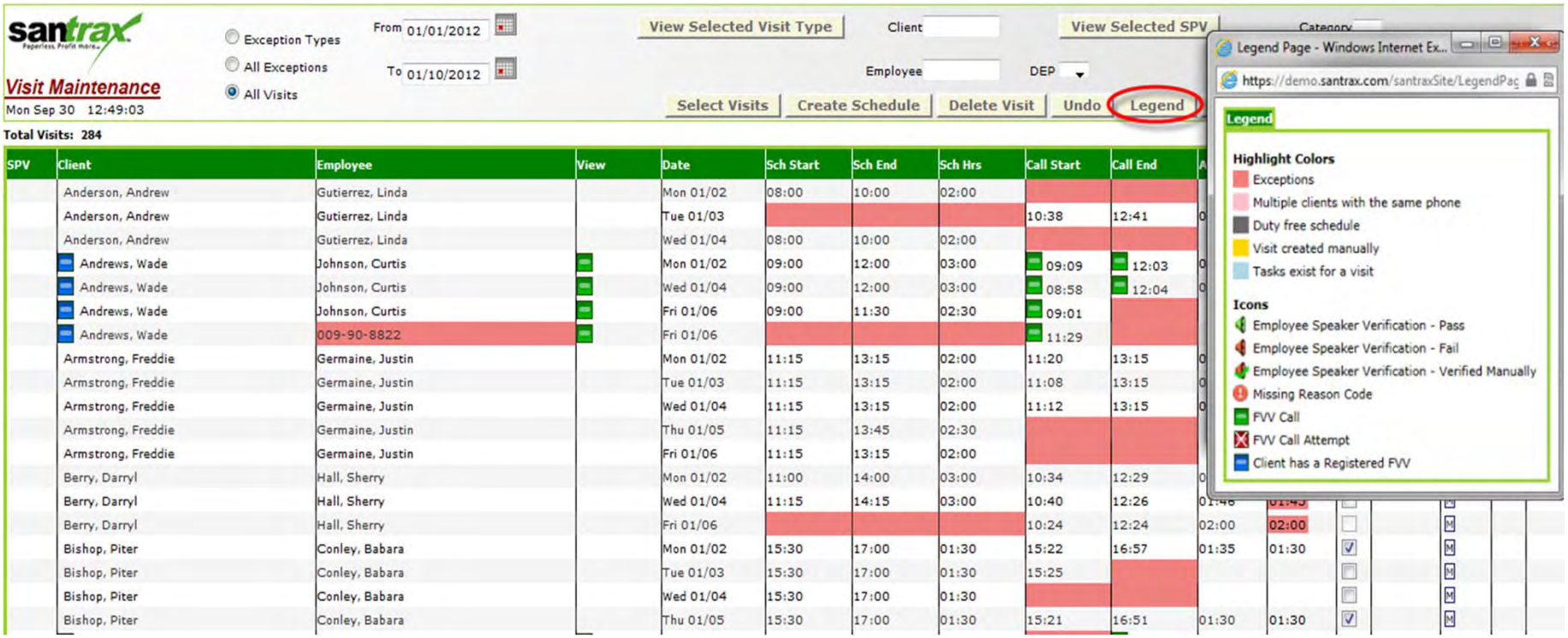
Employee | DEP | Contract

Select Visits | Create Schedule | Delete Visit | Undo | Legend | Get Report | Exit

Total Visits: 283

SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	Task	Exp	No Exp
	Anderson, Andrew	Gutierrez, Linda		Mon 01/02	08:00	10:00	02:00							M				
	Anderson, Andrew	Gutierrez, Linda		Tue 01/03				10:38	12:41	02:03	02:00			M				
	Anderson, Andrew	Gutierrez, Linda		Wed 01/04	08:00	10:00	02:00							M				
	Andrews, Wade	Johnson, Curtis		Mon 01/02	09:00	12:00	03:00	09:09	12:03	02:54	03:00	✓		M				
	Andrews, Wade	Johnson, Curtis		Wed 01/04	09:00	12:00	03:00	08:58	12:04	03:06	03:00	✓		M				
	Andrews, Wade	Johnson, Curtis		Fri 01/06	09:00	11:30	02:30	09:01						M				
	Andrews, Wade	009-90-8822		Fri 01/06				11:29						M				
	Armstrong, Freddie	Germaine, Justin		Mon 01/02	11:15	13:15	02:00	11:20	13:15	01:55	02:00	✓		M				
	Armstrong, Freddie	Germaine, Justin		Tue 01/03	11:15	13:15	02:00	11:08	13:15	02:07	02:00	✓		M				
	Armstrong, Freddie	Germaine, Justin		Wed 01/04	11:15	13:15	02:00	11:12	13:15	02:03	02:00	✓		M				
	Armstrong, Freddie	Germaine, Justin		Thu 01/05	11:15	13:45	02:30							M				
	Armstrong, Freddie	Germaine, Justin		Fri 01/06	11:15	13:15	02:00							M				
	Berry, Darryl	Hall, Sherry		Mon 01/02	11:00	14:00	03:00	10:34	12:29	01:55	02:00			M				
	Berry, Darryl	Hall, Sherry		Wed 01/04	11:15	14:15	03:00	10:40	12:26	01:46	01:45			M				
	Berry, Darryl	Hall, Sherry		Fri 01/06				10:24	12:24	02:00	02:00			M				
	Bishop, Piter	Conley, Babara		Mon 01/02	15:30	17:00	01:30	15:22	16:57	01:35	01:30	✓		M				
	Bishop, Piter	Conley, Babara		Tue 01/03	15:30	17:00	01:30	15:25						M				
	Bishop, Piter	Conley, Babara		Wed 01/04	15:30	17:00	01:30							M				
	Bishop, Piter	Conley, Babara		Thu 01/05	15:30	17:00	01:30	15:21	16:51	01:30	01:30	✓		M				
	Bradley, Kelly	Borges, Maritza		Mon 01/02	13:15	15:45	02:30		15:30					M				
	Bradley, Kelly	Borges, Maritza		Wed 01/04	13:15	16:15	03:00	12:56	15:59	03:03	03:00	✓		M				
	Bradley, Kelly	Borges, Maritza		Thu 01/05	13:30	15:30	02:00		15:28					M				
	Burke, Darren	Manning, Shelly		Wed 01/04	10:50	12:50	02:00	10:52	12:54	02:02	02:00	✓		M				
	Burke, Darren	Manning, Shelly		Thu 01/05	10:50	12:50	02:00	10:50	12:51	02:01	02:00	✓		M				
	Burke, Darren	Manning, Shelly		Fri 01/06				10:53	12:53	02:00	02:00			M				
	Cabus, John	Louis, Genta		Mon 01/02	08:00	11:30	03:30	07:59	11:42	03:43	03:45			M				
	Cabus, John	Louis, Genta		Wed 01/04	08:00	11:30	03:30	08:00	11:35	03:35	03:30	✓		M				

Legend



SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	A				
	Anderson, Andrew	Gutierrez, Linda		Mon 01/02	08:00	10:00	02:00							
	Anderson, Andrew	Gutierrez, Linda		Tue 01/03				10:38	12:41	0				
	Anderson, Andrew	Gutierrez, Linda		Wed 01/04	08:00	10:00	02:00							
	Andrews, Wade	Johnson, Curtis		Mon 01/02	09:00	12:00	03:00	09:09	12:03	0				
	Andrews, Wade	Johnson, Curtis		Wed 01/04	09:00	12:00	03:00	08:58	12:04	0				
	Andrews, Wade	Johnson, Curtis		Fri 01/06	09:00	11:30	02:30	09:01						
	Andrews, Wade	009-90-8822		Fri 01/06				11:29						
	Armstrong, Freddie	Germaine, Justin		Mon 01/02	11:15	13:15	02:00	11:20	13:15	0				
	Armstrong, Freddie	Germaine, Justin		Tue 01/03	11:15	13:15	02:00	11:08	13:15	0				
	Armstrong, Freddie	Germaine, Justin		Wed 01/04	11:15	13:15	02:00	11:12	13:15	0				
	Armstrong, Freddie	Germaine, Justin		Thu 01/05	11:15	13:45	02:30							
	Armstrong, Freddie	Germaine, Justin		Fri 01/06	11:15	13:15	02:00							
	Berry, Darryl	Hall, Sherry		Mon 01/02	11:00	14:00	03:00	10:34	12:29	0				
	Berry, Darryl	Hall, Sherry		Wed 01/04	11:15	14:15	03:00	10:40	12:26	01:46	01:45			
	Berry, Darryl	Hall, Sherry		Fri 01/06				10:24	12:24	02:00	02:00			
	Bishop, Piter	Conley, Babara		Mon 01/02	15:30	17:00	01:30	15:22	16:57	01:35	01:30	✓		
	Bishop, Piter	Conley, Babara		Tue 01/03	15:30	17:00	01:30	15:25						
	Bishop, Piter	Conley, Babara		Wed 01/04	15:30	17:00	01:30							
	Bishop, Piter	Conley, Babara		Thu 01/05	15:30	17:00	01:30	15:21	16:51	01:30	01:30	✓		

Exceptions

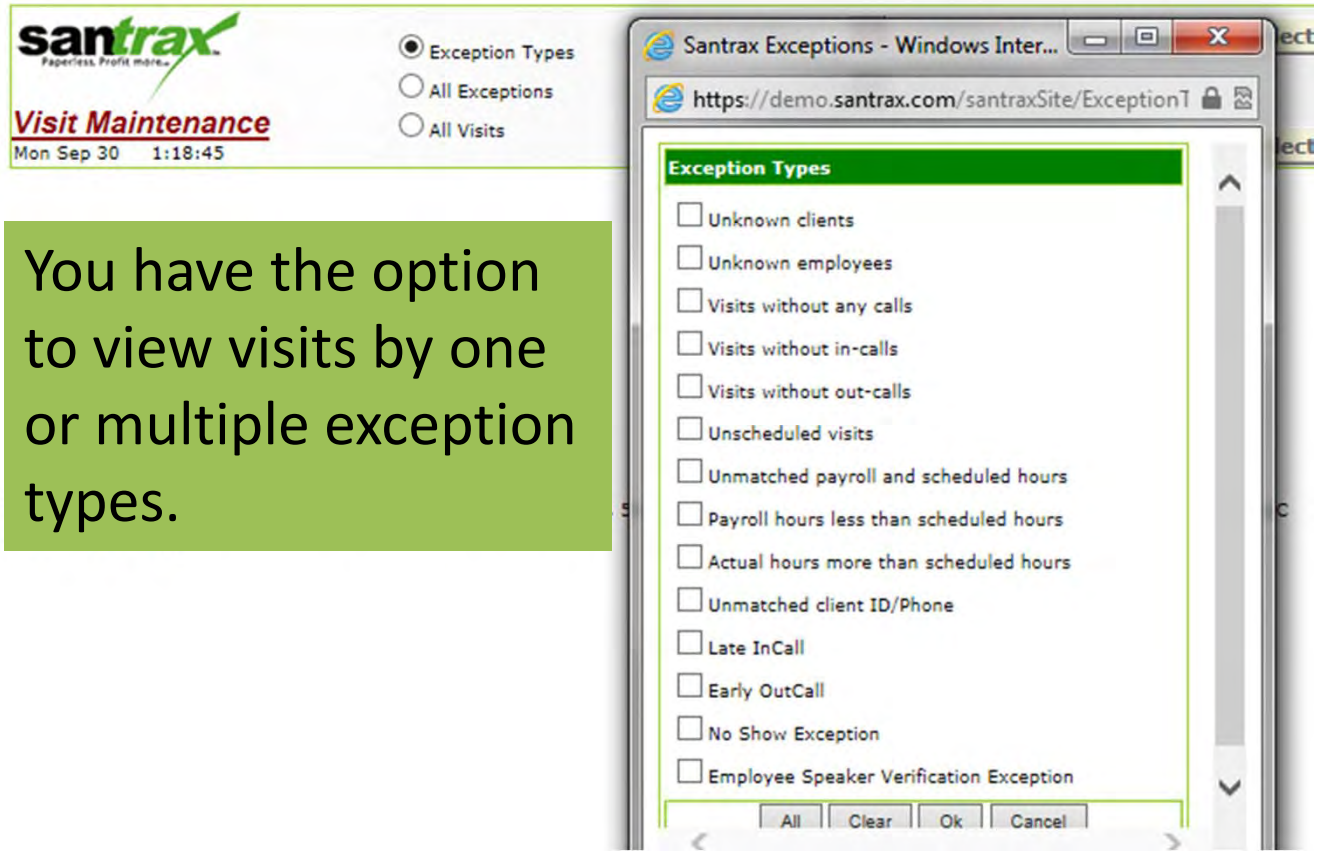
When Santrax cannot confirm an agency worker's visit, his or her information must be corrected in Visit Maintenance.

- Invalid or incomplete information = Exception (appears in red)
- For a single visit, there may be more than one exception

EVV users with appropriate permissions can edit visits in Visit Maintenance.

Common Exception Types

Visit Exceptions are highlighted in Red, indicating data is missing or invalid.



You have the option to view visits by one or multiple exception types.

Correcting Exceptions

Manual adjustments will show **bolded** in Visit Maintenance

- Unknown Client/Employee:
  - Click on the unknown data element (phone number or Santrax ID)
  - Pop-up window opens allowing you to search for the correct Client/Emp.
- Unscheduled Visit:
  - Update your scheduling system with the new schedule and transfer updated data to Santrax. Once processed by Santrax, schedule will exist and calls will be paired to schedule
- Missing call(s):
  - Click on the missing call cell to see if the employee made any unknown calls. If there is an appropriate call and you confirm the call is for the visit, select the call to match it to the schedule.

Adjusting Pay Hours

- Pay hours for a visit will be highlighted in red as an exception when it does not match the scheduled hours. This needs to be reviewed and the hours confirmed.
- Adjusting Pay hours (3 Ways):
  1. Left click once in the pay cell on the visit line and type the desired hours
  2. Double click on the red pay hours cell on the line to confirm the calculated hours
  3. Click the check box to the right of the Pay Hours column to make the Pay Hours equal the Scheduled Hours.

Adjusting/Creating Schedules

BEST PRACTICE: While Santrax has the capability for users to create and delete schedules directly in Visit Maintenance, please note that it is a best practice for agencies using automated scheduling systems to add, modify or delete schedule information directly in their scheduling input source.

Adjusting/Creating Schedules

- Schedule information can be updated by clicking on the schedule to view the details. Typical schedule changes include:
  - Employee (agency worker)
  - Client (Customer)
  - Start Time
  - End Time
- A schedule can be added if it did not exist previously (in cases of last minute replacement worker visits)
- If existing schedule information is changed or a schedule is created, the schedule is highlighted in yellow to serve as a visual indicator.

Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start
Bartlett, Jed	Guidry, Ron		Wed 01/30	15:30	20:00	04:30	
Bartlett, Jed	Guidry, Ron		Thu 01/31	15:30	19:30	04:00	
Bartlett, Jed	Guidry, Ron		Fri 02/01	15:30	19:30	04:00	

Memo & Reason Codes

- Memo and Reason codes allow the user to document why visit information was edited.
- Visit Maintenance is set up to allow free text memos and a configured list of reason codes.

```
< Please Select >
01 Wrong Phone Number - Agency Verified
02 Invalid ID - Agency Verified
03 Phone Unavailable - Agency Verified
06 Agency Worker Failed to Call In/Out - Customer Verified Agency Worker Worked Hours as Entered as Daily Pay Hours
07 Agency Worker did not Work as per Customer Request
08 Fill-in for Regular Agency Worker
09 Additional Hours at Customer Request
10 Customer Does Not Have Home Phone
11 Companion case
13 Customer Refused Agency Worker Use of Phone
15 Services Provided Outside of the Home
16 FVV Requested
17 No Home Phone - Does Not Qualify for FVV
18 Phone Lines Not Working - Agency Worker Not Able to Call
19 Less Hours Worked Than Scheduled at Customer's Request
99 Other
```

Exercise

- Navigating and sorting Visit Maintenance data
- Correcting Exceptions
- Confirming Hours

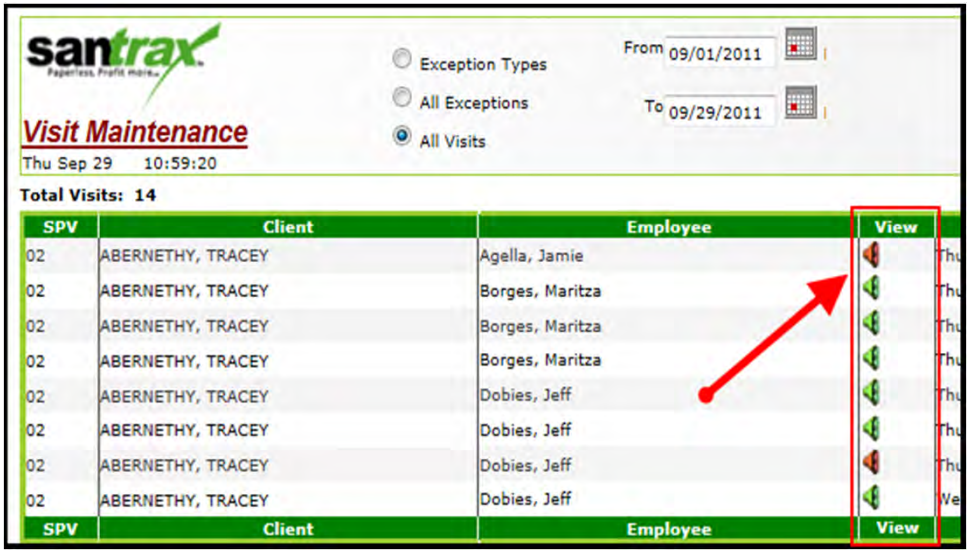
SPEAKER VERIFICATION & VISIT MAINTENANCE

What's covered in this section

- The View Column
- Details of a Passed Call
- Details of a Failed Call
- Manually Verifying Failed Calls
- Memo Field & Authorization Notes

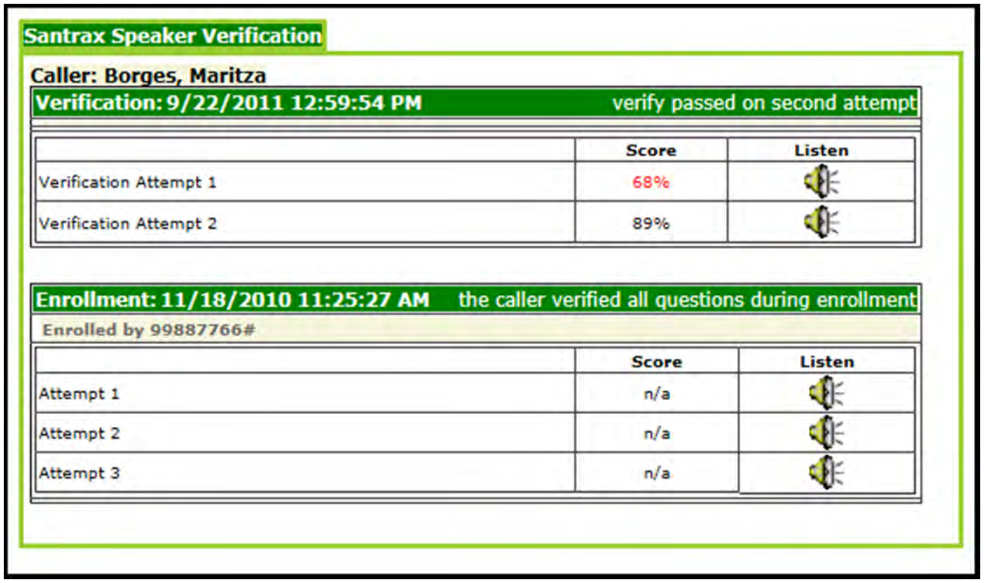
The View Column

- This column indicates the pass/fail status of the call
- Click on the header/footer to sort by pass/fail status
- Speaker Icons in the View Column:
  - **Green** → Passed verification
  - **Red** → Failed verification
- Click on the speaker icon to view details of the call



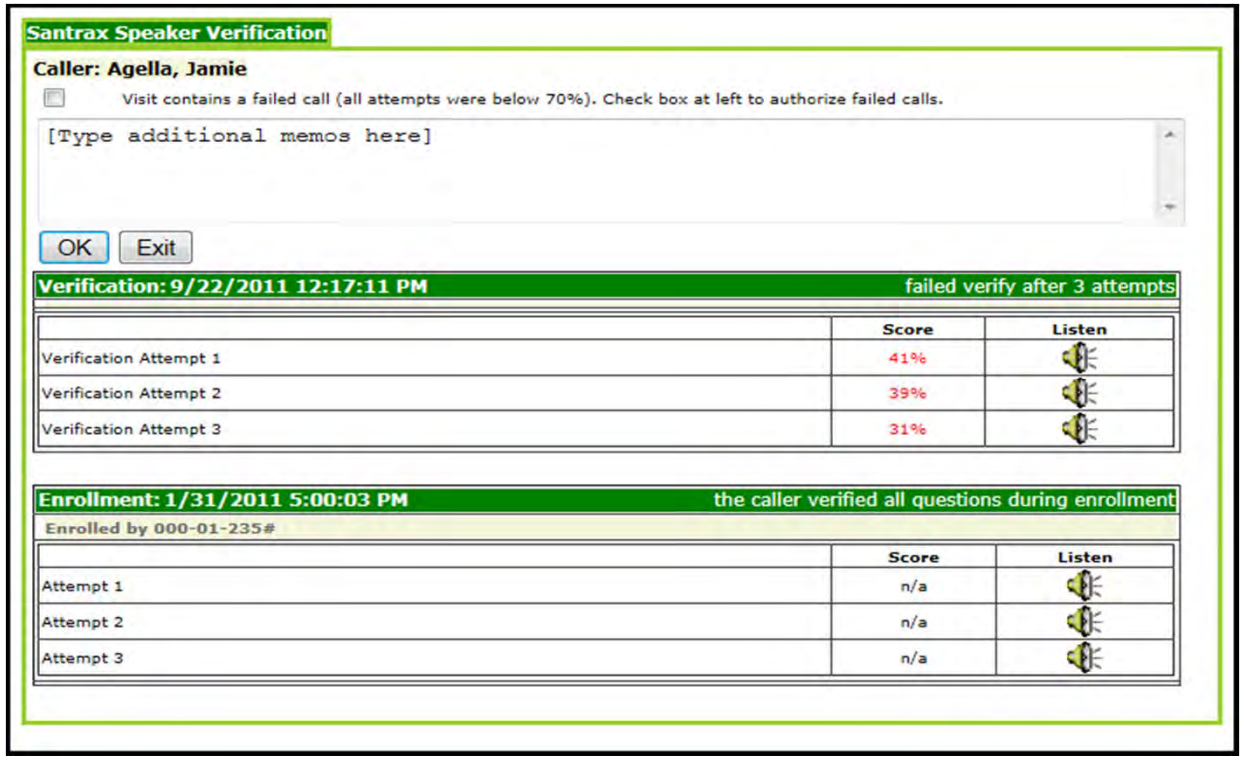
Details of a Passed Call

- Name of the verified caller
- Date and time of each call made for the visit
- Score is displayed for each verification attempt (≥ 70% is considered passed)
- Click on the speaker icon to listen to the call
- A separate box shows enrollment details



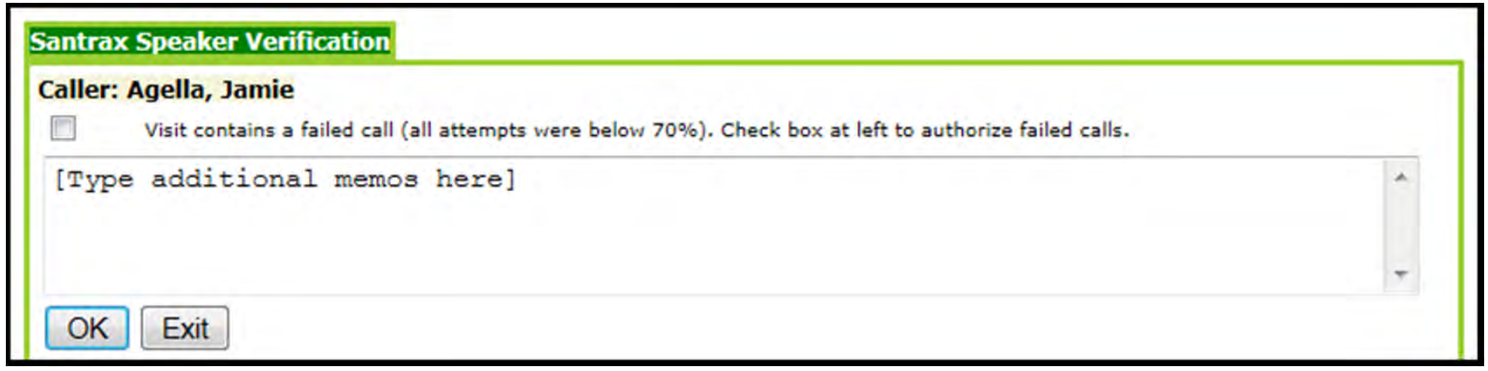
Details of a Failed Call

- Same information as for passed calls
- Also provides the ability to authorize the unverified call and enter a memo



Manually Verifying Failed Calls

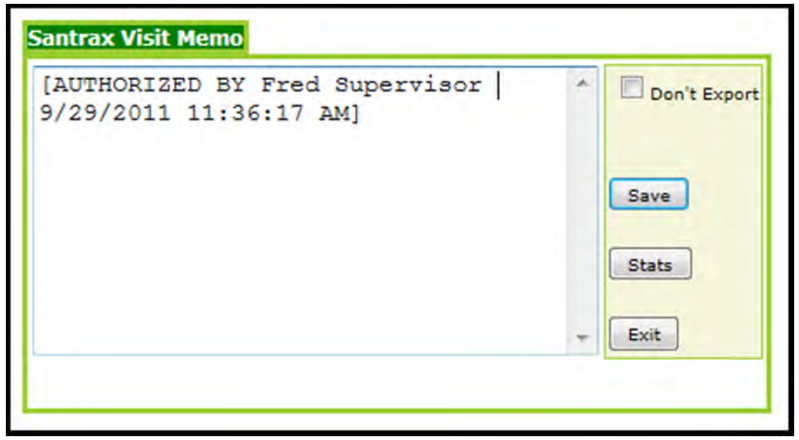
- Within the popup window of the failed call:
  1. Click on the checkbox to authorize the failed call
  2. Enter a memo in the space provided
  3. Click on OK



- Additional memos entered will also appear in the Memo field in Visit Maintenance.

Memo Field & Authorization Notes

- When a failed verification call is authorized, Santrax automatically populates the memo field with an authorization note that contains:
  - Supervisor's Santrax ID
  - Timestamp



- Additional supporting text may be entered in the Memo field after the time stamp

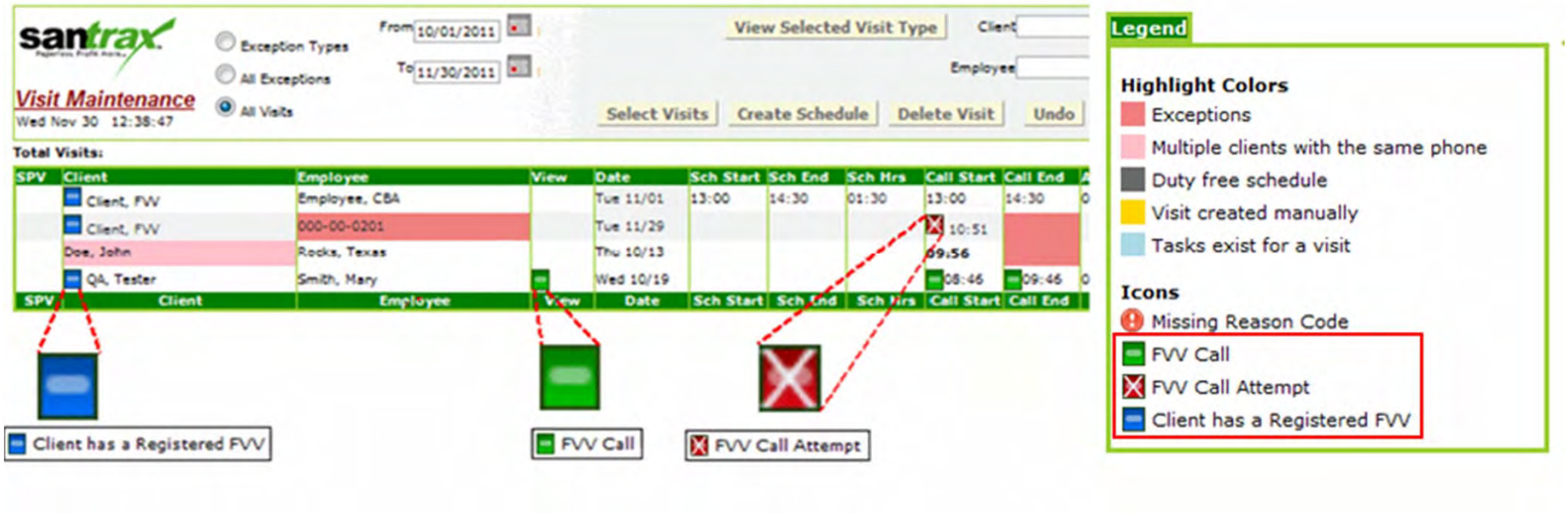
Questions

FVV & VISIT MAINTENANCE

What's covered in this section

- How to identify the FVV icons displayed in Visit Maintenance.
- How to correct a FVV visit exception in Visit Maintenance
- What additional reports are available

FVV: Visit Maintenance Legend Icons/Symbols



- FVV calls where a value has been entered display in Visit Maintenance with a green box under the View column of the visit line (shown above).
- Individuals with registered FVV Devices appear with a blue box to the left of their name in the Client column.

FVV: Visit Maintenance Information

Click the icon( ) to view the call details, including:

- the first and second visit verification numbers (FVV Values)
- calculated times based on the values
- Caller (agency worker) and Client (customer) associated with the call

Fixed Visit Verification(FVV)

Caller: A, MARIA

Client: B, DORA

Call Received: 5/4/2011 7:02:11 PM

Calculated Date/Time	FVV Value	Type
5/3/2011 7:42:32 AM	087-823	Call In
5/3/2011 8:21:32 AM	043-104	Call Out

FVV: Visit Maintenance Process

The Agency needs to use Visit Maintenance to fill in missing data or make corrections.

Correcting FVV visits uses the same process as home telephone call corrections.

Examples of missing information or errors in data include:

- Client ID and/or Employee ID is entered incorrectly.
- Multiple FVV calls are made.
- FVV Device In or Out values are entered incorrectly.

Example: FVV Call Unknown/Invalid Client

Unknown client

The red FVV attempt

SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	A
	(516)526-9439	Fry, Ted		Fri 06/17				13:09		
SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	A

Note: When the Client ID is entered incorrectly, or not at all, the time of the call (not the time of the visit) appears in Call Start.

Example: FVV Call
Unknown Client and Employee

SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End
	(516)526-9439	000-06-5893		Fri 06/17				13:15	
SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End

Incorrect Client ID and Santrax ID. Client and employee fields are flagged in red.

Example: FVV Call Missing Call Out

When the call was made to enter the FVV values for the visit, the Call Out value was incorrect or missing, therefore the Call End box is red.

Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hr
Client, FVV	Texas, Lovely		Mon 06/20	07:00	09:00	02:00	07:07			
Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hr

When the FVV icon is showing, the Call Start/End values represent the time of the visit (not the time of the call).

Example: FVV Call
FVV attempt – no value entered

When FVV values are not entered at the time of the call, the time of the call (not the time of the visit) appears in Call Start

Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hr
Client, FVV	Rose, Debra		Mon 06/20	08:00	09:00	01:00	09:19		
Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hr

Visit Maintenance: Multiple FVV Calls

If FVV values for the same visit were entered on different calls, Santrax will apply visit-matching logic to automatically associate the values to the correct visit.

If a match cannot be made, manual adjustments will be needed to resolve any missing or unmatched call information.

* ***Note: agency workers should try to avoid making more than one call to enter FVV values.***

Exercise

- Viewing FVV visits
- Correcting FVV exceptions

Questions

REPORTS

What's covered in this section

- Accessing the Report menus
- Sort and Filter Options
- Daily Reports
- Date Range Reports
- Q & A

Reports Menu

The Reports menu is listed in the green menu bar across the top of the Santrax Homepage

Reports | Exports | Start Dashboard | New Visit Maintenance | Authorization | Plan of Care | Security | Santrax Documentation |

Santrax v7.12

Select Report

Report Type

Daily Reports

Report Name

Daily Call Listing

Select Timeframe

From

11/04/2013 00:00

To

11/04/2013 23:59

Select Parameters

Contract All

Program All

Service All

Client All

Client AR# All

Supervisor All

Department All

Employee All

Order Sequence

Run Report

Last transfer files received
None

Last transfer files processed
None

Last reject files processed
None

Exit

santrax TELEPHONY

Sort and Filter Options

- Two types of reports are available; Daily and Date Range
- Each report contains its own set of search parameters. The Parameters section will change based upon the report chosen.
- Daily Reports will only allow for a single date to be entered. Date Range reports will allow for a range of dates to be entered

Santrax uses Military Time: Conversion Table

Regular Time	Military Time	Regular Time	Military Time
Midnight	0000	Noon	1200
1:00 a.m.	0100	1:00 p.m.	1300
2:00 a.m.	0200	2:00 p.m.	1400
3:00 a.m.	0300	3:00 p.m.	1500
4:00 a.m.	0400	4:00 p.m.	1600
5:00 a.m.	0500	5:00 p.m.	1700
6:00 a.m.	0600	6:00 p.m.	1800
7:00 a.m.	0700	7:00 p.m.	1900
8:00 a.m.	0800	8:00 p.m.	2000
9:00 a.m.	0900	9:00 p.m.	2100
10:00 a.m.	1000	10:00 p.m.	2200
11:00 a.m.	1100	11:00 p.m.	2300

Helpful Hint:

Just add 12 to the hour to make it PM.

Daily Reports

Common Daily Reports

- Daily Call Listing – line item listing of calls into the account
- No Show – lists any missed visits where a call has not yet been received
- Unknown Client – calls made from unrecognized phone numbers
- Unknown (Attn/Emp) – calls made with unrecognized Santrax IDs
- Unscheduled Visit – calls received from an unscheduled Client/Employee combination or call time is more than two hours outside of the schedule
- Master Schedule – list of schedules for the day
- Clients (Customers) – list of active clients on that day
- Attendant/Employee – list of active agency workers on that day
- Daily Call Summary – lists scheduled visits with start and end times

Date Range Reports

Common Date Range Reports:

- Employee Weekly Master Schedule – weekly schedules by employee
- Client Weekly Master Schedule – weekly schedules by customer
- Weekly Call Summary – lists schedules with call times and summarizes total schedule with total worked time
- Payroll Summary (Emp) – lists by Employee the visits worked, hours for each visit and total hours for specified date range
- Payroll Summary (Cli) - lists by customer the visits worked, hours for each visit and total hours for specified date range
- Visit Maintenance Report – printable view of Visit Maintenance
- Visit Maintenance Exceptions – printable view of exceptions
- Visit Maintenance Activity – audit trail of Visit Maintenance changes

FVV Reports

FVV Devices and calls made using an FVV Device generate some specific reports.

FVV Registrations Report (Date Range): Displays a listing of customers with a registered FVV device for the specified date range.

FVV Call Listing Report (Date Range menu): Displays all calls made using an FVV Device within the specified date range.

Speaker Verification Daily Call Listing

The “SV” Speaker Verification column will display “OK” for passed speaker verification calls and “X” for failed calls, or blank if there is no Speaker Verification.

11:40 Sep 29, '11 DAILY CALL LISTING FOR 09-29-11 00:00 - 11:40 Ver: 6.70 Page 3

VEN: 998 Local Aid SORT ORDER: SUPERVISOR,CLIENT,TIME

SPV:

CLIENT	CLIENT-NAME	EMPLOYEE	EMPLOYEE-NAME	SANTRAX ID	<-----SCHEDULED-----> START	END	HOURS	CALL TIME	SV
23505	JOHNSTON, ELIZABETH	71921	BRADLEY, VINCENT	110-66-0845	08:00	09:00	01.00	08:00	OK
23505	JOHNSTON, ELIZABETH	71921	BRADLEY, VINCENT	110-66-0845	08:00	09:00	01.00	08:57	OK
23505	JOHNSTON, ELIZABETH	71921	BRADLEY, VINCENT	110-66-0845	10:00	11:00	01.00	10:08	X
23505	JOHNSTON, ELIZABETH	71921	BRADLEY, VINCENT	110-66-0845	10:00	11:00	01.00	11:01	OK

- CLIENT ID ENTERED ON CALL v - VOICE CALL *- MULTIPLE CLIENTS WITH SAME PHONE M-SECONDARY NUTUAL CLIENT ▶ - CHANGED

Speaker Verification Enrollment Status Report

- This report can be found on the Daily tab
- Lists enrollment date and time of employees enrolled

SPEAKER VERIFICATION ENROLLMENT STATUS REPORT

Ver 6.7 Page 1

ACTIVE EMPLOYEES ONLY

29-SEP-11 10:50:58

Wednesday 09-14-11

VEN: 0998 Local Aid

Sort Order: Employee ID

EMPLOYEE	EMPLOYEE-NAME	SANTRAX-ID	ENROLLMENT DATE	ENROLLMENT TIME	SUPERVISOR
	Agella, Jamie		05/05/10	14:27	
	Thompson, David	987-65-4321	05/13/11	10:49	
	GIARMO, TOM	000-03-3333	12/17/09	09:33	
	Spinney, Mike	000-03-4655	09/28/10	17:19	
	Last, Robert	000-01-2345	01/08/10	09:41	
	Borges, Maritza	000-02-2222	11/18/10	11:25	
	Scott, Donna	000-03-3611	10/07/10	11:14	

Total Employees: 7

Exercise

- Running Reports

Questions

Sandata TECHNOLOGIES

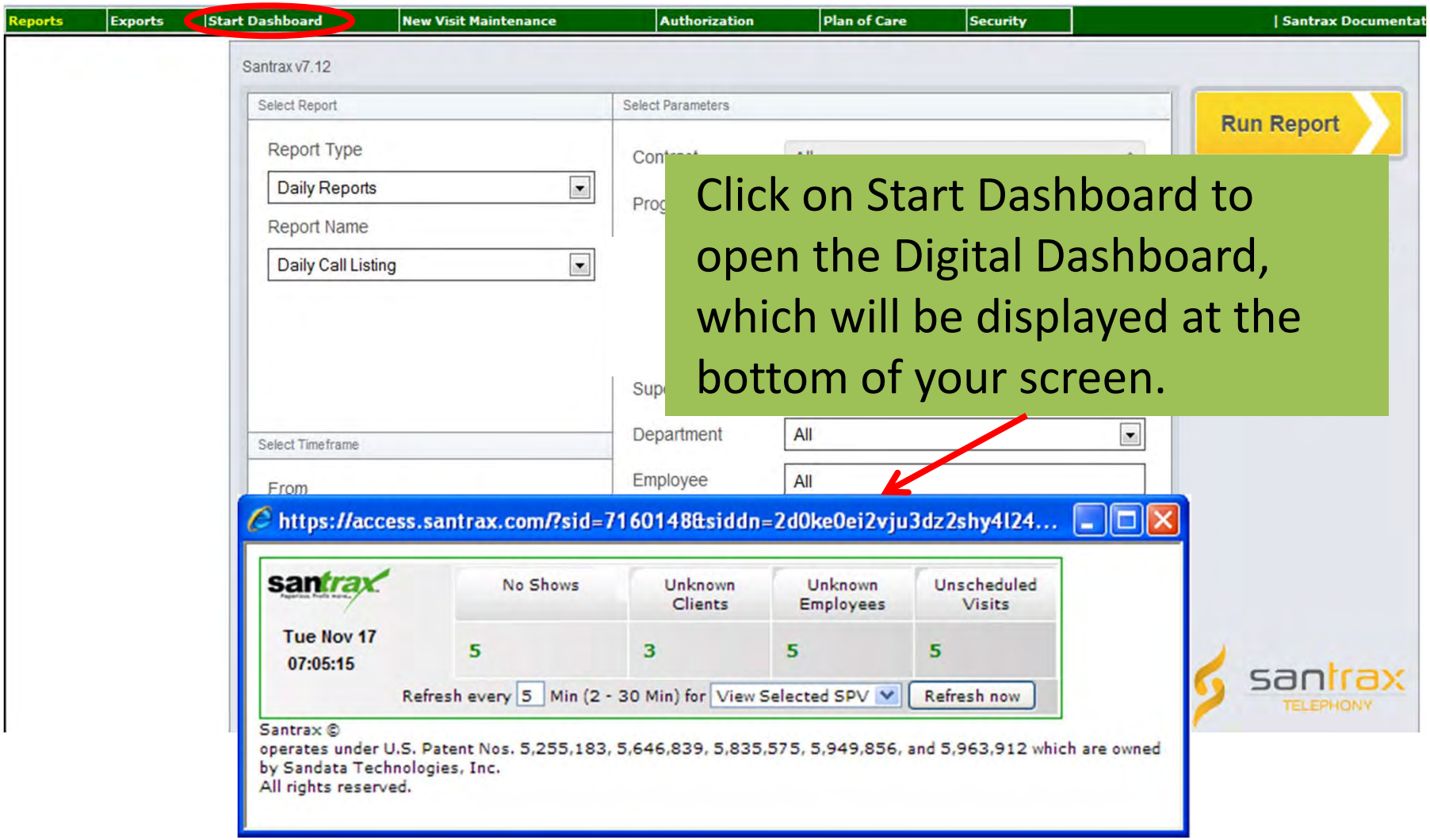
DIGITAL DASHBOARD

Digital Dashboard Purpose

The Digital Dashboard:

- Window providing real-time view of exceptions
- Can be left open on all EVV Users' computers
- Shows visit activity that may need to be addressed in Visit Maintenance (i.e. no shows)

Digital Dashboard Creation



Click on Start Dashboard to open the Digital Dashboard, which will be displayed at the bottom of your screen.

Digital Dashboard

You can minimize Santrax and leave the Dashboard open all the time.

The Santrax Dashboard provides information in real time so you can monitor services being provided.

You can set the Digital Dashboard refresh every two to thirty minutes.

Dashboard Detailed Exception Information

https://access.santrax.com/?reqFrom=dashBoar...

Santrax No Show Exception Details

Total: 15 | Refresh now | This view is auto-refresh every 5 min

Client Name	Worker Name	Date	Start Time
A, Evelyn	R, Leshia	Tue 11/17	07:00
B, Lawrence	D, Debbie	Tue 11/17	07:00
C, William	S, Barbara	Tue 11/17	07:00
C, Rosalee	L, Loretta	Tue 11/17	07:00
G, Rena	F, Samantha	Tue 11/17	07:00

https://access.santrax.com/?sid=7160148&siddn=2d0ke0ei2vju3dz2shy4l24...

santrax

	No Shows	Unknown Clients	Unknown Employees	Unscheduled Visits
Tue Nov 17 07:05:15	5	3	5	5

Refresh every 5 Min (2 - 30 Min) for View Selected SPV | Refresh now

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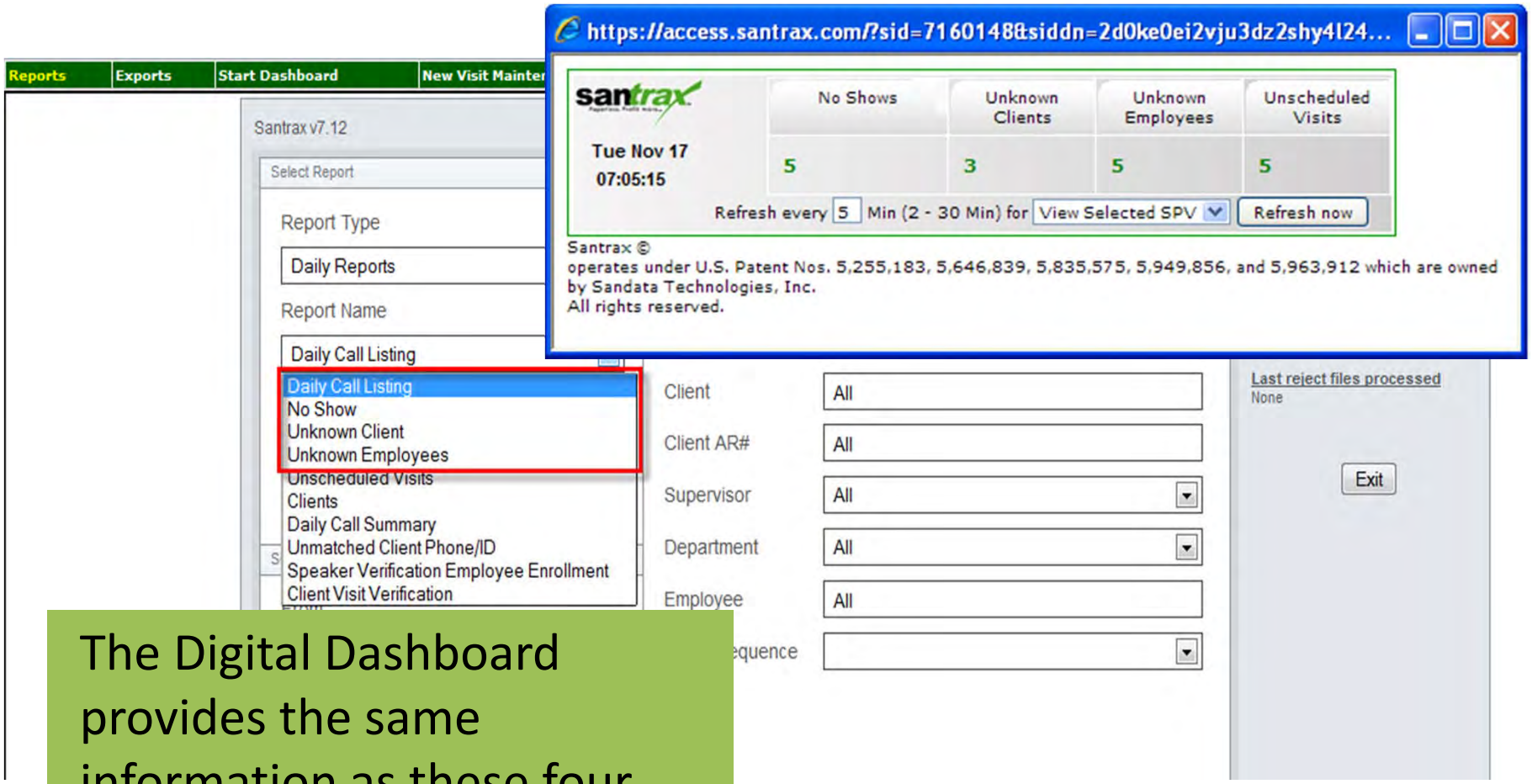
Clicking on the number that appears under a specific column heading will provide you with detailed information for that exception.

Dashboard and Reports



The Digital Dashboard provides the same information as these four Daily Reports.

Questions

NEXT STEPS

NEXT STEPS

- Welcome email containing Getting Started information will be emailed to the Agency Administrator
- Identify office staff that will be using the EVV System
- Educate your field staff on the telephony process

RESOURCES AND CONTACT INFO

- Access the DHS EVV website for additional information: **www.dhs.illinois.gov/evv**
- For EVV System or technical questions, call the toll-free Sandata Customer Care line at: 855-331-8191

THANK YOU FOR YOUR TIME!