



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

- Your Santrax ID.
- Your Client's ID.

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.*


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

2.  **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."


3.  **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."


4.  **Press (2) for not a group visit.**

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

6.  **Press the (1) key to "Call In".**

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

7.  **Press the numbers of the client's ID.**

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


8.  **Hang up.**


**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 1 thru 4 to and then continue.**

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

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


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

11.  **Press the numbers of the client's ID.**


 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."

13.  **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."

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



15.  **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."


16.  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."
17.  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."
18.  The client should press the appropriate option.
  -  Santrax will say: "Thank you, bye."
19.  Hang up.

### What to do if there is a Problem:

These are some possible problems you may experience when using the telephone.

-  Busy Signal
-  No Answer

1. Check the number to make sure you have the right phone number.
2. Try calling again.
3. Try calling the second toll-free number provided.
4. If you still cannot complete the call, contact your supervisor or CDS Employer, as applicable.

-  If the system says: " **Sorry, Invalid Number**"

See if the phone has a **T-P** (Tone-to-pulse) switch; make sure the switch is on **T**. If there is no switch, you must say your ID number one digit at a time, into the phone after the tone.



Call Reference Guide:

## SUNSHINE-IN HOME CARE AND ASSI

**Agency Account Number: STX 42322**

Write your Santrax ID number above for easy reference.

**Dial:**  
**1-844-512-8085**  
**Or**  
**1-855-532-0869**

### Features:

- |                                |                            |
|--------------------------------|----------------------------|
| STX ID Verification / Playback | Group Visit – No           |
| CIOF                           | Select Service             |
| Client Voice Recording         | Client Verification: Visit |
| Client Verification: Service   |                            |