Electronic Visit Verification (EVV) Caregiver Guide – Telephony

Fact Sheet - June 2020

Purpose

This guide is for caregivers using the Sandata Telephony Visit Verification (TVV) system, used by provider agencies utilizing the State EVV Solution. TVV allows caregivers to begin and end a visit and does not require a smart device unlike Mobile Visit Verification (MVV). MVV is the primary and preferred method of calling in and out for client visits, however TVV may be used when MVV is not available. TVV can still be utilized with a smart device that has calling capabilities.

Caregivers must work with their provider agencies to assure that their employee status is set to active in the Employee Module of the Sandata EVV web tool. Provider agencies should assure that the phone number the caregiver is calling from is associated with the primary address of the client receiving services in the administrative view (or utilize an Alternate Location to specify correct address after time of service).

Caregivers using Telephony should obtain a "Call Reference Guide" from their provider agency to assist in using Telephony at time of service.

Each provider agency has two toll-free numbers that may be utilized by caregivers from any phone 24 hours a day, 7 days a week. Please contact your provider agency for this information.

Individual Caregiver Call In Process (with audible prompts)

1. Dial the toll-free number

   - Santrax will say (in the respective languages): "For English, please press one (1). For Spanish, please press two (2). For Egyptian Arabic, please press three (3). For Russian, please press four (4). For Chinese Mandarin, please press five (5). For Somali, please press six (6)."

2. Press the number that corresponds to the desired language.

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

3. Press the numbers of your Santrax ID (contact your Provider Agency for correct number) on the touch tone phone.

   • Santrax will say: "**Is this a Group Visit, press 1 for Yes or 2 for No.**"

4. Press 2.

   • If the caregiver's phone number is associated to more than one client, you will be prompted to provide the Client ID to identify the client you are providing services to:

      • Santrax will say: "**Please enter first Client ID or hang up if done.**"

      • Enter the Client ID for the client receiving care.

      • Santrax will say: "**Press 1 to call in or 2 to call out.**"

   • If the caregiver's phone number is not associated to more than one client, you will not be prompted to provide the Client ID.

      • Santrax will say: "**Press 1 to call in or 2 to call out.**"

5. Press 1 to call in.

   • Santrax will say: "**Received at [Time]. Thank you, bye.**"

6. **Hang up** when done.

Individual Caregiver Call Out Process (with audible prompts)

1. Dial the toll-free number (contact your Provider Agency for the number)

   • Santrax will say (in the respective languages): "**For English, please press one (1). For Spanish, please press two (2). For Egyptian Arabic, please press three (3). For Russian, please press four (4). For Chinese Mandarin, please press five (5). For Somali, please press six (6).**"

2. Press the number that corresponds to the desired language.

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

3. Press the numbers of your Santrax ID (contact your Provider Agency for correct number) on the touch tone phone.

   • Santrax will say: "**Press 1 to call in or 2 to call out.**"

4. Press 2 to call-out.

    - Santrax will say: "Received at [Time]"

      If the caregiver's phone number **is associated** to more than one client, you will be prompted to provide the Client ID to identify the client you are providing services to:

      1. Santrax will say: "Please enter first Client ID or hang up if done."

      2. Enter the Client ID for the client receiving care.

      3. Santrax will say: "Please enter the Service ID"

      If the caregiver's phone number **is not associated** to more than one client, you will not be prompted to provide the Client ID.

      1. Santrax will say: "Please enter the Service ID"

5. Press the three-digit ID of the care performed (Service IDs are listed on the back of the Call Reference Guide provided by the Provider Agency).

    - Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."

6. Accept by pressing 1 or press 2 and retry until able to accept.

    - Santrax will say: "Enter number of tasks."

      Tasks are only used in Colorado EVV for notating that an alternate location needs to be recorded:

      If not declaring an alternate location:

      1. **Hang up**.

      If declaring an alternate location:

      1. Press 1

      2. Santrax will say: "Enter task ID."

      3. Press 1 to indicate an Alternate Location

      4. **Hang up**. (Notify your Provider Agency of the actual location.)

Group Visit Caregiver Call In Process (with audible prompts)

1. Dial the toll-free number

   - Santrax will say (in the respective languages): "For English, please press one (1). For Spanish, please press two (2). For Egyptian Arabic, please press three (3). For Russian, please press four (4). For Chinese Mandarin, please press five (5). For Somali, please press six (6)."

2. Press the number that corresponds to the desired 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: "Is this a Group Visit, press 1 for Yes or 2 for No."

4. Press 1 for Yes

   - Santrax will say: "Press 1 to start a new group visit, 2 to continue your group visit, 3 to join a group visit, 4 to exit group visit menu"

5. Press 1 to start a new group visit

   - Santrax will say: "You will start a new group visit with group visit code [XXXXXX]. 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."

6. Press 1 to add a client.

   - Santrax will say: "Press 1 to call-in or 2 to call-out."

7. Press 1 to call-in

   - Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."

8. Enter the client ID for the first client being added to the group visit.

   - Santrax will say: "Enter second client ID or hang up if done."

9. Repeat step 8 for each client being added to the group visit.

10. **Hang up** when done entering clients.

Group Visit Care Call Out Process (with audible prompts)

1. Dial the toll-free number

   - Santrax will say (in the respective languages): "For English, please press one (1). For Spanish, please press two (2). For Egyptian Arabic, please press three (3). For Russian, please press four (4). For Chinese Mandarin, please press five (5). For Somali, please press six (6)."

2. Press the number that corresponds to the desired language.

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

3. Press the numbers of your Santrax ID (contact your Provider Agency for correct number) on the touch tone phone.

   - Santrax will say: "Is this a Group Visit, press 1 for Yes or 2 for No."

4. Press 1 for Yes.

   - Santrax will say: "Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group menu."

5. Press 2 to continue the group visit.

   - Santrax will say: "Please enter the group visit code."

6. Enter the 6-digit group visit code.

   - If the code entered is not valid, Santrax will say: "You have entered an invalid visit code. Please try again."

   - If the code entered is valid, Santrax will say: "You will continue the group visit with visit code [XXXXX]. Please press 1 to add a client to the group visit, 2 to complete 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."

7. Press 2 to complete the visit.

   - Santrax will say "Please select 1 to call in or 2 to call out."

8. Press 2 to call out.

   - Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."

9. Enter the Client ID number.

    - Santrax will say: "Please enter the Service ID."

10. Press the ID of the care performed.

    - Santrax will say "You entered [Service]. Please press 1 to accept, 2 to retry."

11. Accept by pressing 1 or press 2 and retry until able to accept.

    - Santrax will say: "Enter number of tasks."

      Tasks are only used in Colorado EVV for notating that an alternate location needs to be recorded:

      If not declaring an alternate location:

      1. **Hang up**.

      If declaring an alternate location:

      1. Press 1

      2. Santrax will say: "Enter task ID."

      3. Press 1 to indicate an Alternate Location

      4. **Hang up**. (Notify your Provider Agency of the actual location.)

Helpful notes:

- For each prompt, Santrax allows a caller three attempts to enter the information correctly. After three unsuccessful attempts, the call is terminated.

- Caregivers using the task to declare an Alternate Location must notify the provider agency where services were delivered. Additional guidance on Alternate Location functionality is located on the Department's EVV website.

Please direct questions to your Provider Agency or the Sandata Help Desk

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