



Sandata
TECHNOLOGIES

Rhode Island EOHHS Electronic Visit Verification (EVV) Program Provider Training – Phase I

Santrax Maintenance



Agenda

- ⌘ Santrax Dashboard
- ⌘ Santrax Maintenance
- ⌘ Exception Types
- ⌘ Correcting Exceptions
- ⌘ Merging Calls
- ⌘ Overriding Hours
- ⌘ Adding Tasks
- ⌘ Adding Comments

Santrax Dashboard

	No Shows	Unknown Clients	Unknown Employees	Unscheduled Visits	Late Visits	Missed Visits
Total	0	1	1	1	0	0

Refresh Every Min (1-30 Min)

- ⚡ The Santrax Dashboard appears in the top right-hand panel of the Home Screen.
- ⚡ The Dashboard shows the current day's visit with exceptions.
- ⚡ The drop-down box controls the screen refresh rate.

Exceptions



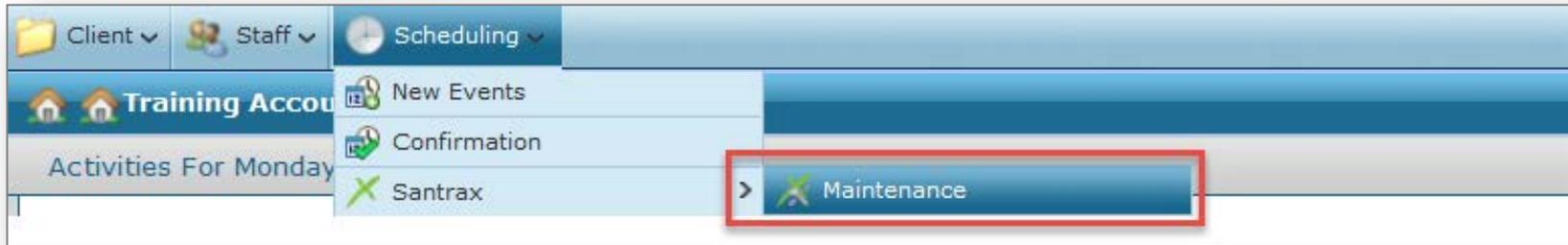
- ⚡ The most frequent exceptions are as follows:

Exception	Description
No Show	No call received within 5 minutes of the scheduled start.
Unknown Client	Call was not made from a registered phone number. May be a new phone or employee cell.
Unknown Employee	Staff is not registered, punched in the wrong ID, or hung up before receiving a time stamp.
Unscheduled Visit	Call(s) received that do not match any schedule. Can be an event was not scheduled or originally had a different caregiver or time.

- ⚡ These are the same exceptions that appear on the Dashboard
- ⚡ Only a System Admin can manually confirm exceptions.

Accessing Santrax Maintenance

- ⚡ Access the Santrax Maintenance screen by selecting it from the Scheduling drop-down list



Screen Filters

Santrax Maintenance Clear Filter FVV Refresh Print Close

Search Filters

Client: Client ID: Date From: 05/04/2016
Admission: Date To: 05/05/2016
Staff: Staff ID: Time Range:
Company: Coordinator: Beehler, Jenice A.
Dennie, Nestor
Location: Position:
Admit Type: Service:
Team: Event:
Region: Status:
Exception: MRN #:
Payor #:

Status Legend

- Hide Cancelled Events
- Only Events With Calls
- Only Exceptions
- Santrax Clients Only
- Auto Update Schedules
- Hide Prior Day Visits
- Exclude Unknown Clients

Calendar: May 2016

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

- Client: Client last name
- Staff: Employee last name
- Company: Private or Certified
- Staff ID: Employee Agency ID
- Coordinator: Multi-select list
- Status: Hold, In-Process
- Service: Homemaker, Personal Care, etc...
- Date: Enter From and To dates
- Exclude Unknown Clients: Uncheck to include unknown client calls

Column Headings



O	Visit related icons (i.e. overnight visit )
Date	Visit Date
Coord	Coordinator code (used for grouping clients)
Client	Client name (Last name, First name)
Service	Service code
Staff	Employee name (Last name, First name)
Sch Start	Schedule Start time
Sch End	Schedule End time
Sch Hrs	Total Schedule Hours
Call Start	Call-In time
Call End	Call-Out time
Act Hrs	Actual worked hours

Pay Hrs	Pay Hours rounded based on VNS rules
OTABS Hrs	OT/ABS visit hours - when authorized and worked hours do not match
OTABS Reason	OT/ABS reason code (auto populated when reason code is entered)
Auth	Authorized hours
Tasks	Visits tasks
P->A	Check the box to copy scheduled hours to pay Hours
Ovrd	Check the box to accept the calculated worked hours
Reason Code	List of visit change reasons
Memo	Opens schedule details window to enter comments
Exceptions	Lists exception reason(s) for the visit

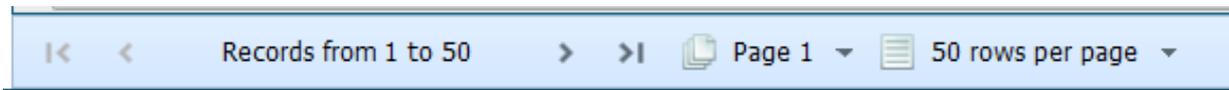
Sorting & Navigating

- Click column headers to sort by the selected column.

Total Shown: 48

O	Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth	Tasks	P->A	Ovrd
	05/04/16-We	124	CARTER, RICHARD	S5125	Caulfield, Jovita	RN	13:00	14:30		1.50	13:00	14:30	1.50	1.50	1.50	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	GATSON, JANET	S5130	Lichtenberger, Bry	HMK	14:00	15:00		1.00	14:01	15:00	0.98	1.00	1.00	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	JOHNSON, DAISY	S5125C	Mcelligott, Benedic	CNA	14:00	15:00		1.00	14:00	15:00	1.00	1.00	1.00	N	3	<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	KLEIN, MARIA	S5125C	Harring, Willow	RN	14:00	15:00		1.00	14:00			-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	CARTER, RICHARD	S5125	Royer, Trang	CNA	15:00	16:30		1.50	14:45	16:30	1.75	1.75	1.75	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	LONDON, CHRISTOPH	S5130	Vessels, Brigida	CNA	15:00	16:00		1.00				-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00	15:30			-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	124	KLEIN, MARIA	S5125C	Rudman, Dominiqu	LPN	16:00	17:00		1.00		17:04		-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	JOHNSON, DAISY	S5125C	Snow, Suzanna	CNA	16:00	17:00		1.00	15:58	17:00	1.03	1.00	1.00	N	2	<input type="checkbox"/>	<input type="checkbox"/>
	05/04/16-We	111	GATSON, JANET	S5130	Beehler, Jenice A.	HMK	16:00	17:00		1.00	16:00	17:00	1.00	1.00	1.00	N		<input type="checkbox"/>	<input type="checkbox"/>

- Use the page controls at the bottom of the screen to set the number of lines per page or jump to a specific page.



Sorting & Navigating



- ⚡ System defaults to display all visits except Unknown Clients.
- ⚡ Exceptions appear in red and description is displayed in Exception column.
- ⚡ Unscheduled Visits will show dashes (--) in Schedule Start and End columns.
- ⚡ Mouse over the client or employee name for pop-up to see Santrax ID and contact numbers.
- ⚡ Manual adjustments/edits will appear bolded.

Exception Types

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

- Unknown Client – Attendant calls from a phone number that is not assigned to any recipient.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/05/16-Th		(516) 484-4400		Lichtenberger, Bry	HMK	--	--		0.00	21:27				-

- Unknown Employee – Santrax ID entered does not match to any employee

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/04/16-We	124	KLEIN, MARIA		00123471#		--	--		0.00	17:02				-

Exception Types



- **Unscheduled Visit** – Start and End calls received but not matched to a schedule. Dashes appear in Scheduled Start and End cells.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/04/16-We	124	RIOS, EDGAR		Mcavoy, Daniella	LPN	--	--		0.00	16:00			-	-

- **Missing call(s)** – Call Start or Call End is highlighted in red.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/04/16-We	124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00	15:30			-	-

- **Pay Hrs different from Scheduled Hrs** – Aide worked more or less than scheduled. Scheduled Hrs and Pay Hrs will be highlighted in red.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/05/16-Th	124	LEATER, ALAN	S5125	Pera, Kathaleen	CNA	12:00	13:00		1.00	12:02	13:18	1.27	1.25	1.25

Correcting Exceptions



⚡ Missing call(s):

1. Filter data by client to identify if there's a call with an unknown Santrax ID from the client's home
2. Right click on schedule to open Merge Calls window
3. Select the unknown Santrax ID call to merge

-
1. Filter data by Staff and uncheck 'Exclude Unknown Clients' to see any staff calling from an alternate number
 2. Right click on schedule to open Merge Calls window
 3. Select the unknown phone call to merge

⚡ Unscheduled Visit:

1. Click on the unscheduled visit line with the calls
2. Enter the proposed schedule times
3. Save the updates

Correcting Exceptions



⚡ Unfilled/Unassigned Visit:

1. Click on the visit line
2. Fill the schedule with the aide that worked
3. Save the update

⚡ Confirming worked hours less than scheduled:

- Click the **Ovrd** box and select the appropriate reason in the Reason Code pop-up window.

⚡ Save your corrections.

Merging Calls

- ⚡ Sorting and filtering by Client helps locate calls with Staff ID errors
- ⚡ Sorting and filtering by Staff helps locate calls from unregistered phones (*uncheck the 'exclude unknown clients' filter*)
- ⚡ Filter for a specific Client or Staff to see the schedule and additional unknown Client or Staff call together

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
05/05/16-Th		(646) 533-8500		Beehler, Jenice A.	HMK	--	--		0.00	16:21			-	-
05/05/16-Th	111	BELL, BEATRICE	S5130	Beehler, Jenice A.	HMK	14:00	15:30		1.50				-	-

Merging Calls – *cont'd*

1. Click anywhere on a schedule line that needs calls merged to highlight it, then right click
(Schedule must have a service in order to merge calls to it)
2. Click Merge Calls in pop-up
 - A dialog box with all the potential calls you can merge will open

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Au
05/05/16-Th		(646) 533-8535		Beehler, Jenice A.	HMK	--	--		0.00	16:21				-	-
05/05/16-Th	111	BELL, BEATRICE	S5130	Beehler, Jenice A.	HMK	14:00	15:30		1.50						
05/05/16-Th	111	GATSON, JAM	S5130	Beehler, Jenice A.	HMK	16:00	17:00		1.00	16:15	17:00				

Merge Calls

1

2

Merging Calls – *cont'd*

3. Select the appropriate call
 - Calls within 2 hours of the start or end of the schedule
 - Same or unknown staff and client
4. Click the Merge button

Merge Calls Refresh Merge Split

Search Filters

Exception:

Client:

Staff:

Client Phone Match

Schedule Info

Client: **BELL, BEATRICE** Date: **05/05/2016**

Staff: **Beehler, Jenice A.** Time IN: **14:00**

Service: **S5130** Time OUT: **15:30**

Time Zone:

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	05/05/2016 - Thu		Beehler, Jenice A.	14:03	15:02		4	Unscheduled Event, Unknown
	05/05/2016 - Thu		Beehler, Jenice A.	16:21			2	Unscheduled Event, Unknown
	05/05/2016 - Thu		000012345	16:27				Unscheduled Event, Unknown

Overriding Bill and Pay Hours

When Pay hours do not match the scheduled hours, the exception can be corrected in the following ways:

- Double-click in the Pay column and type in the correct hours.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth	Tasks	P->A	Ovrd
05/04/16-We	111	GATSON, JANET	S5130	Crandell, Melisa	HMK	11:30	12:30		1.00	11:45	12:36	0.85	0.75	<input type="text"/>	N		<input type="checkbox"/>	<input type="checkbox"/>
05/05/16-Th	111	GATSON, JANET	S5130	Crandell, Melisa	HMK	11:30	12:30		1.00		12:58		-	-	N		<input type="checkbox"/>	<input type="checkbox"/>

- Check the Ovr (Override) box to accept the calculated Pay hours.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth	Tasks	P->A	Ovrd
05/05/16-Th	124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00		16:34		-	-	N	2		<input type="checkbox"/>
05/04/16-We	111	GATSON, JANET	S5130	Crandell, Melisa	HMK	11:30	12:30		1.00	11:45	12:36	0.85	1.00	1.00	N			<input checked="" type="checkbox"/>

Overriding Bill and Pay Hours

- Check the P->A (Proposed to Actual) box to make the Pay Hours match the Scheduled hours

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth	Tasks	P->A	Ovrd
05/05/16-Th	124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00		16:34		-	-	N		<input type="checkbox"/>	<input type="checkbox"/>
05/04/16-We	111	GATSON, JANET	S5130	Crandell, Melisa	HMK	11:30	12:30		1.00	11:45	12:36	0.85	1.00	1.00	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



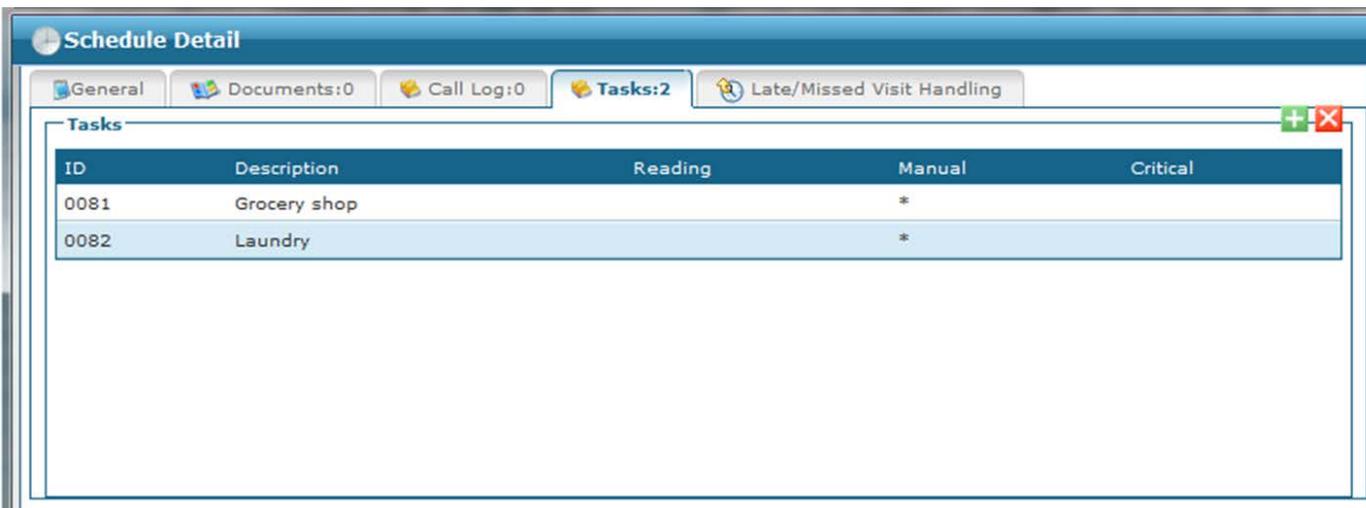
Overriding Bill and Pay Hours

- ⚡ When the Bill or Pay hours need to be adjusted, double-click in the appropriate column and type in the correct number.
- ⚡ Bill hours cannot be greater than scheduled hours.
- ⚡ Decimal points are not required for whole hours.
- ⚡ Save to Confirm changes.

Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	Ovrd	M
04/02/2012 - Mon	Alterations, Evelyn	T1019	Abercrombie, Ros	HHA	10:00	14:00		4.00	10:31	14:01	3.50	4		0	1	<input checked="" type="checkbox"/>	
04/02/2012 - Mon	Alterations, Evelyn	S5130	Abercrombie, Ros	HHA	15:00	16:00		1.00	14:59	15:57	0.97	1.00	1.00	0	4	<input type="checkbox"/>	

Adding Tasks

- Tasks should be entered by the caregiver when they call out.
- If tasks were not entered, they can be added via the **Tasks** tab in the Schedule Details view.



The screenshot shows a software interface titled "Schedule Detail". It has several tabs: "General", "Documents:0", "Call Log:0", "Tasks:2", and "Late/Missed Visit Handling". The "Tasks" tab is active, displaying a table with the following data:

ID	Description	Reading	Manual	Critical
0081	Grocery shop		*	
0082	Laundry		*	

Reason Codes

- ⚡ When adjusting or correcting a visit, the user will be prompted to select the appropriate reason for the change.
- ⚡ The selected reason can be added as a note.

Reason Codes Refresh

Select an Edit Reason

Filters:

Initiated By Client Staff Agency Payor Other
Name:

Code	Name	Initiated By
MIS14	Additional Staff needed for this case	Client
34	No answer to locked door	Client
39	No phone in home or disconnected	Client
40	Not able to call Santrax; patient emergency	Client
38	Phone in use by patient/family	Client
32	Recipient Emergency	Client
08	Recipient Expired	Client
37	Recipient in a Psychiatric Facility	Client
04	Recipient in Nursing Facility	Client
36	Recipient in the Hospital (Not Psychiatric Facilit	Client
03	Recipient in the Hospital/Psychiatric Facility	Client
09	Recipient No Longer Eligible for Services	Client
01	Recipient on Vacation/Out of Town	Client
25	Recipient removed from home by family	Client

Note:

Task Note:

Adding Comments

- ⚡ The **Comments** section on the **Schedule Details** screen can be used to note schedule changes or manual confirmation reasons.

Schedule Detail

Documents:0 Call Log:1 Tasks:0

General

Date: 05/04/2016 - Wed

Service: S5125- Personal Care

Company: RI Agency

Location: Warwick

PoS:

Shift Group: Warwick No Shift

Event Code(s)

DEF Default

Comments

Client phone was in use at call out time. Service was verified.

What You Have Learned



- ⚡ Accessing the Santrax Dashboard
- ⚡ Understanding common types of exceptions
- ⚡ Accessing Santrax Maintenance and key functionality
 - Sorting
 - Merging Calls
 - Manually Confirming Exceptions
 - Overriding Bill and Pay Hours
 - Adding Tasks
 - Adding Comments



DEMONSTRATION MAINTENANCE

