

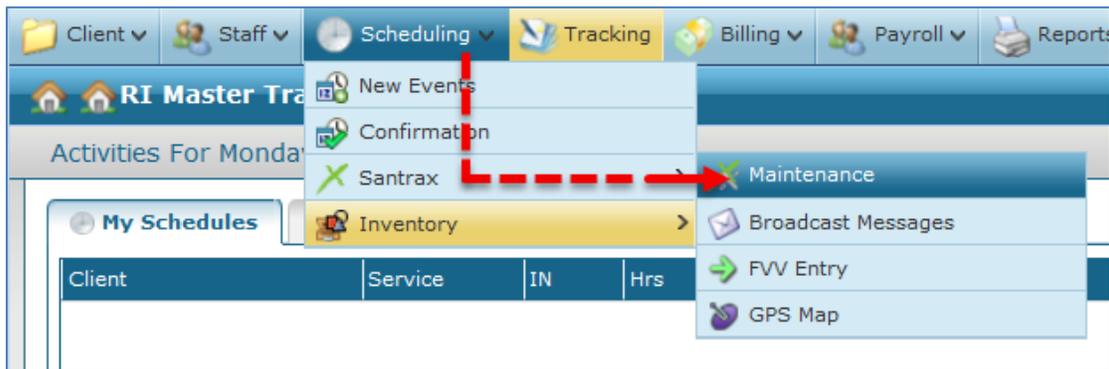


Santrax[®] Agency Management Visit Maintenance – Merging Calls Quick Reference Guide

Accessing Santrax Maintenance

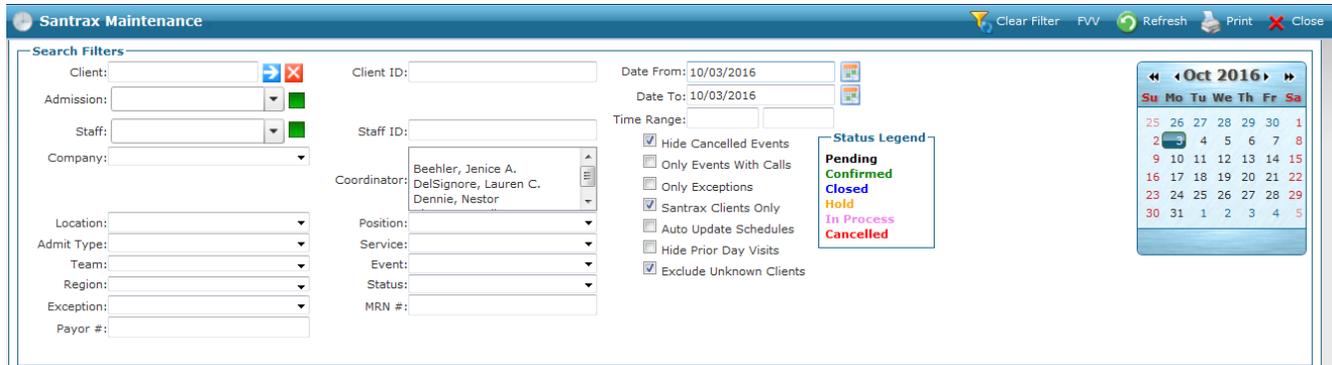
The Santrax Maintenance module is where authorized users can review visits which have already occurred and make adjustments or corrections if necessary to resolve exceptions.

1. From the Top Menu bar, hover over **Scheduling** > **Santrax**, and then click **Maintenance** to launch the **Santrax Maintenance** screen.



Filtering

Use the search filters to limit the visit data to display. Once specified, click the **Refresh** icon on the tool bar to perform the search.



Commonly Used Filters

- **Client:** Use this filter to search for a specific Client, via the dropdown or Advanced Search functionality.
- **Staff:** Use this filter to search for a specific Staff member, via the dropdown or Advanced Search functionality.
- **Staff ID:** Use this filter to search for a specific staff member's **Agency ID** located in the **General** section of the staff member's profile.
- **Coordinator:** Filter by desired Coordinator. This field allows the user to make multiple selections. Press **<Ctrl>** and click the desired item to make multiple individual selections. Press **<Shift>** the click the first then last dropdown options to select a series.
- **Status:** Select the appropriate schedule Status from the drop-down list, to search for schedules with a specific status such as **Hold** or **In-Process**.
- **Date From and Date To:** The system always defaults to today's date. Change the "**From**" and "**To**" dates to broaden your date selection, by manually entering a date, or selecting a date from the calendar icon.
- **Hide Cancelled Events:** By default, this filter is selected to exclude cancelled events. To view cancelled events, clear this field.
- **Exclude Unknown Clients:** By default, this filter is selected to exclude calls made from unknown telephone numbers.



Santrax® Agency Management Visit Maintenance Quick Reference Guide

Merging Calls

When the system cannot automatically match a caregiver's call-in/call-out time to a scheduled visit, the visit will be highlighted in red as an exception in Maintenance. Visit exceptions must be reviewed and cleared before the visit can be confirmed and eligible for billing. The unmatched call(s) will appear on a separate line and should be merged to the schedule line once it has been verified that services were provided to the client.

A. **Unknown Client:** A caregiver calls from a phone number that does not match to any phone number listed in the client's record. The phone number the call originated from appears in place of the client name and is on a separate line. Follow the steps below to merge the unknown client call to the scheduled visit.

1. Enter the visit date into the 'Date From' and 'Date To' fields.
2. Uncheck the 'Exclude Unknown Clients' filter.
3. Enter the scheduled staff's last name into the filter and click **Refresh** to see just that staff's information.

Or...

Click **Refresh** to see all search results then **left click** once on the 'Staff' column header to sort all the visit data in Staff order (A->Z).

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	Reason Code	Memo	Exceptions
	10/07/16-Fr		(516) 484-4400		Rudman, Dominque	LPN	--	--		0.00	15:12											
	10/07/16-Fr	124	BELL, BEATRICE	S5130	Fanning, Susan	CNA	11:00	13:00		2.00							N					
	10/07/16-Fr	111	SMITH, GLORIA	T1000L	Rudman, Dominque	LPN	15:15	16:00		0.75												

4. Locate the schedule line where calls should be merged. (If an unknown call exists, you will see an additional line above or below the schedule line because the data is filtered or sorted by staff name.

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	
	10/07/16-Fr		(516) 484-4400		Rudman, Dominque	LPN	--	--		0.00	15:12								
	10/07/16-Fr	111	SMITH, GLORIA	T1000L	Rudman, Dominque	LPN	15:15	16:00		0.75							N		

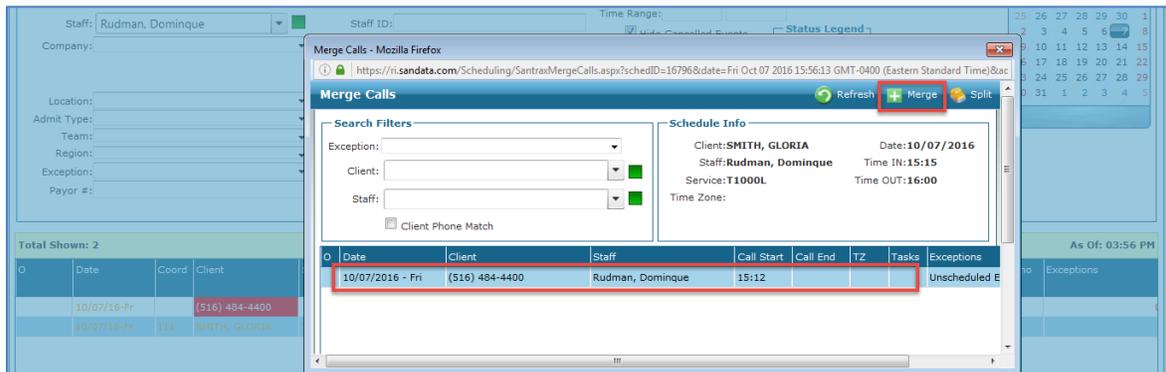
5. **Left click** once on the schedule line to highlight the line.
6. **Right click** once on the highlighted line to display the 'Merge Calls' pop-up.

Total Shown: 2																		
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
	10/07/16-Fr		(516) 484-4400		Rudman, Dominique	LPN	--	--		0.00	15:12							
	10/07/16-Fr	111	SMITH, GLORIA	T1000L	Rudman, Dominique	LPN	15:15	16:00		0.75							N	

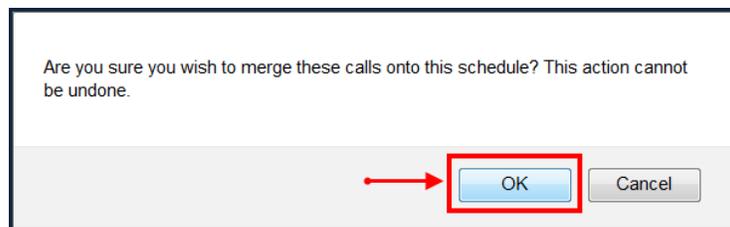
Merge Calls

7. **Left click** once on the 'Merge Calls' pop-up that appears on the line. A window with all the potential calls to merge to the schedule will appear.
8. Select the appropriate call to merge.
9. Click the **Merge** button.

A message will appear asking if you are sure you wish to merge the call – choose **OK** to complete the merge.



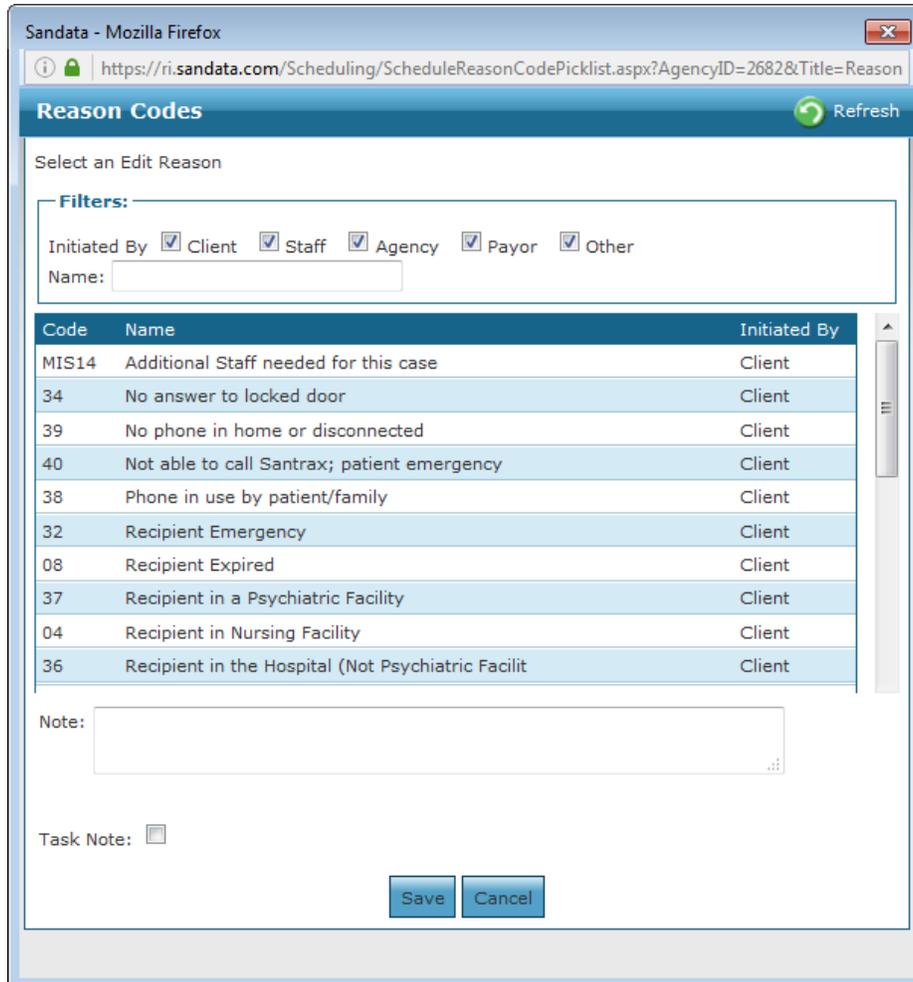
10. Click **OK**. A Reason Code pop up screen is displayed.





Warnings: Once a call is merged this action cannot be undone!

11. Select the appropriate Reason Code. Use the filters above to filter the code list.
12. Enter a **Note** and check the *Task Note* box if the note should appear in the Notes report.
13. Click **Save**.
 - a. The call(s) will now merge on the **Santrax Maintenance** screen. Please note that there may be additional exceptions after the merge that need to be addressed.



Sandata - Mozilla Firefox
 https://ri.sandata.com/Scheduling/ScheduleReasonCodePicklist.aspx?AgencyID=2682&Title=Reason

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

Note:

Task Note:

Save Cancel



Note(s):

The **Call Start** and **Call End** columns will be bolded for schedules with merged calls applied.



Santrax® Agency Management Visit Maintenance Quick Reference Guide

B. **Unknown Staff:** A caregiver calls and enters a Santrax ID that does not match to any caregiver in the system. The Santrax ID appears in place of the caregiver name. In instances when no ID is entered, a blank space appears in the staff field. Follow the steps below to merge the unknown staff call to the scheduled visit.

1. Enter the visit date into the 'Date From' and 'Date To' fields.
2. Enter the scheduled client's last name into the filter and click **Refresh** to see just that client's information.

Or...

Click **Refresh** to see all search results then **left click** once on the 'Client' column header to sort all the visit data in client order (A->Z).

3. Locate the schedule line where calls should be merged. (If an unknown call exists, you will see an additional line above or below the schedule line because the data is filtered or sorted by client name.

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	
	10/10/16-Mo	111	GATSON, JANET		006663222		--	--		0.00	09:40			-	-				<input type="checkbox"/>
	10/10/16-Mo	111	GATSON, JANET	S5130	Mak, Rachana	CNA	09:30	10:30		1.00				-	-		N		<input type="checkbox"/>

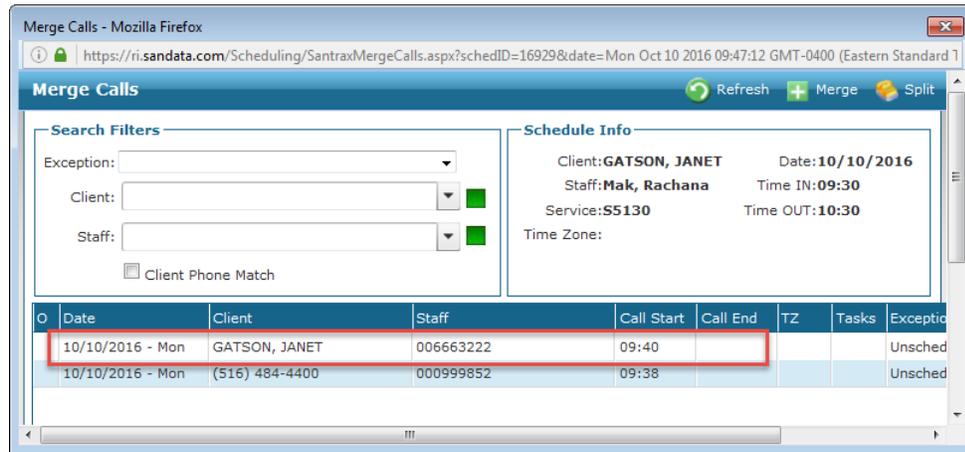
4. **Left click** once on the schedule line to highlight the line.
5. **Right click** once on the highlighted line to display the 'Merge Calls' pop-up.

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	
	10/10/16-Mo	111	GATSON, JANET		006663222		--	--		0.00	09:40			-	-				<input type="checkbox"/>
	10/10/16-Mo	111	GATSON, JANET	S5130	Mak, Rachana	CNA	09:30	10:30		1.00				-	-		N		<input type="checkbox"/>

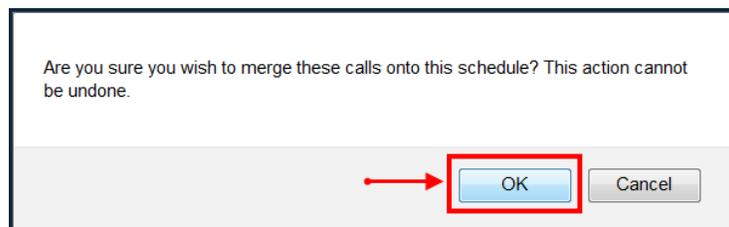
Merge Calls

6. **Left click** once on the 'Merge Calls' pop-up that appears on the line. A window with all the potential calls to merge to the schedule will appear.
7. Select the appropriate call to merge.
8. Click the **Merge** button.

A message will appear asking if you are sure you wish to merge the call – choose **OK** to complete the merge.



9. Click **OK**. A *Reason Code* pop up screen is displayed.



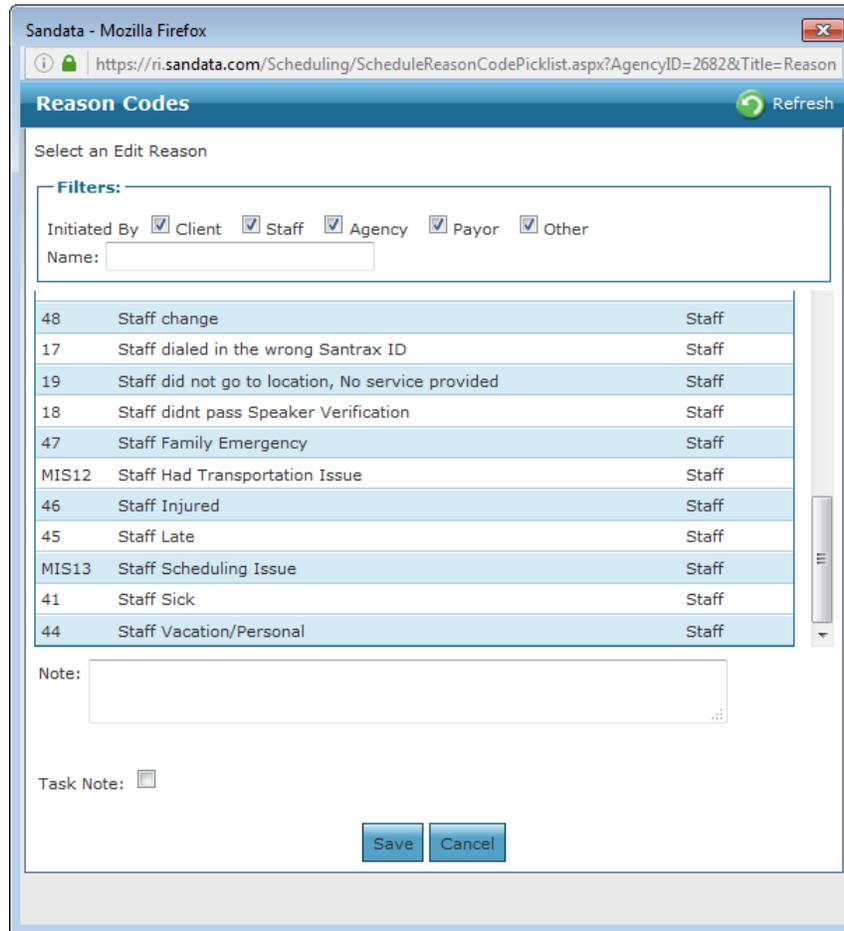
Warnings: *Once a call is merged this action cannot be undone!*

10. Select the appropriate Reason Code. Use the filters above to filter the code list.

11. Enter a **Note** and check the *Task Note* box if the note should appear in the Notes report.

12. Click **Save**.

The call(s) will now merge on the **Santrax Maintenance** screen. Please note that there may be additional exceptions after the merge that need to be addressed.



Code	Description	Category
48	Staff change	Staff
17	Staff dialed in the wrong Santrax ID	Staff
19	Staff did not go to location, No service provided	Staff
18	Staff didnt pass Speaker Verification	Staff
47	Staff Family Emergency	Staff
MIS12	Staff Had Transportation Issue	Staff
46	Staff Injured	Staff
45	Staff Late	Staff
MIS13	Staff Scheduling Issue	Staff
41	Staff Sick	Staff
44	Staff Vacation/Personal	Staff



Note(s):

The **Call Start** and **Call End** columns will be **bolded** for schedules with merged calls applied.

- C. **Unscheduled Visit:** There is no schedule in the system for that client and caregiver visit. The call times appear as a line entry without any schedule times. Follow the steps below to merge unscheduled visit calls.

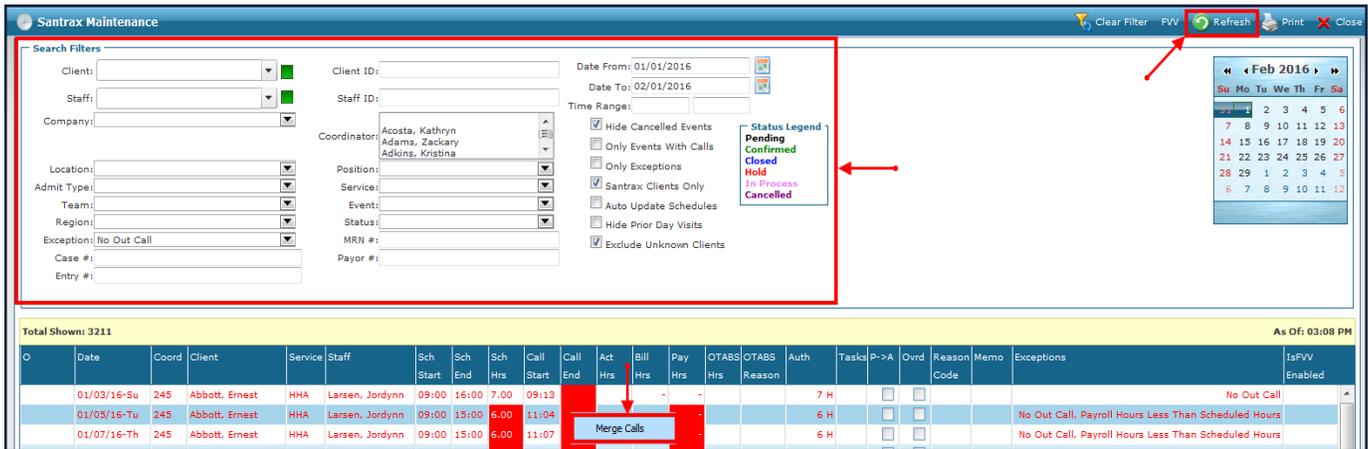
Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
10/07/16-Fr		SMITH, GLORIA		Rudman, Dominque	LPN	--	--		0.00	13:00	15:12		-	-

1. If visit is valid, create a schedule for the client, staff and schedule time that is within two hours of the call time(s).
2. Follow the previously outlined steps to merge the calls to the added schedule, starting from: **Left click** once on the schedule line to highlight the line.

Splitting Calls

In some instances, the system pairs calls from an unknown telephone number or unknown Santrax ID together that should be separated (split) in order to apply the "in call" to one visit and the "out call" to a second visit. The following steps will show you how to split calls, in order for you to merge or apply each call to separate visit.

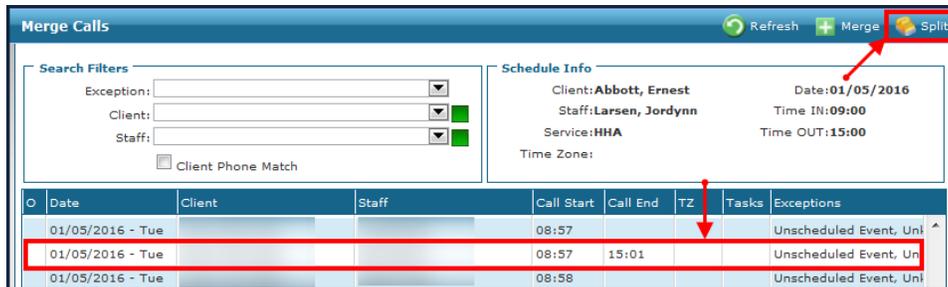
1. Select the applicable **Client/Staff** filter or sort columns accordingly, if applicable and click **Refresh**.
2. **Left click** on the schedule line.
3. **Right click** on the highlighted line to display the 'Merge Calls' pop-up.
4. Click on **Merge Calls**. The Merge Calls pop up box will be displayed.



The screenshot shows the Santrax Maintenance interface. At the top right, there are buttons for 'Clear Filter', 'FVV', 'Refresh', 'Print', and 'Close'. A red arrow points to the 'Refresh' button. On the left, there are search filters for Client, Staff, Company, Location, Admit Type, Team, Region, Exception, Case #, and Entry #. In the center, there are fields for Client ID, Staff ID, Date From, Date To, and Time Range, along with checkboxes for 'Hide Cancelled Events', 'Only Events With Calls', 'Only Exceptions', 'Santrax: Clients Only', 'Auto Update Schedules', 'Hide Prior Day Visits', and 'Exclude Unknown Clients'. A 'Status Legend' box is also visible. Below the filters, a table shows a list of calls. The third row is highlighted in blue, and a red box highlights the 'Merge Calls' button in the 'Act' column of that row. A red arrow points to this button.

O	Date	Coord	Client	Service	Staff	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	OTABS Hrs	OTABS Reason	Auth	Task	P->A	Ovrd	Reason Code	Memo	Exceptions	IsPW Enabled	
	01/03/16-Su	245	Abbott, Ernest	HHA	Larsen, Jordynn	09:00	16:00	7.00	09:13														No Out Call	
	01/05/16-Tu	245	Abbott, Ernest	HHA	Larsen, Jordynn	09:00	13:00	6.00	11:04														No Out Call, Payroll Hours Less Than Scheduled Hours	
	01/07/16-Th	245	Abbott, Ernest	HHA	Larsen, Jordynn	09:00	15:00	6.00	11:07														No Out Call, Payroll Hours Less Than Scheduled Hours	

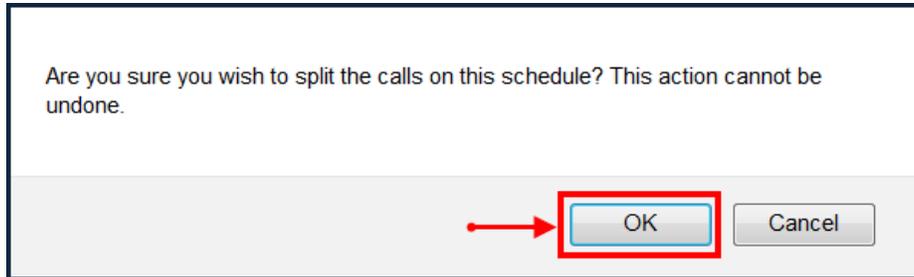
5. Select the appropriate line of paired calls to split/separate.
6. Click **Split**.



The screenshot shows the 'Merge Calls' pop-up window. At the top right, there are buttons for 'Refresh', 'Merge', and 'Split'. A red arrow points to the 'Split' button. On the left, there are search filters for Exception, Client, and Staff, along with a 'Client Phone Match' checkbox. On the right, there is 'Schedule Info' for Client: Abbott, Ernest, Staff: Larsen, Jordynn, Service: HHA, Date: 01/05/2016, Time IN: 09:00, and Time OUT: 15:00. Below the filters, a table shows a list of calls. The second row is highlighted in red, and a red arrow points to it.

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	01/05/2016 - Tue			08:57				Unscheduled Event, Un
	01/05/2016 - Tue			08:57	15:01			Unscheduled Event, Un
	01/05/2016 - Tue			08:58				Unscheduled Event, Un

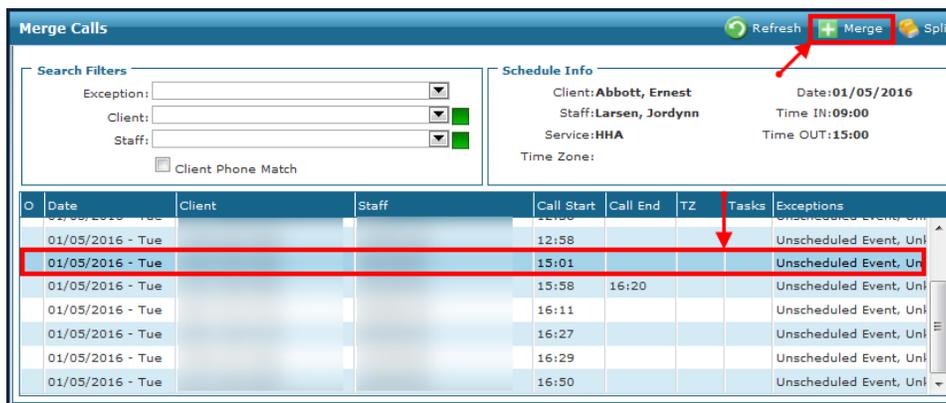
7. Click on **OK**. Your calls will now split in the Merge Calls pop up box.



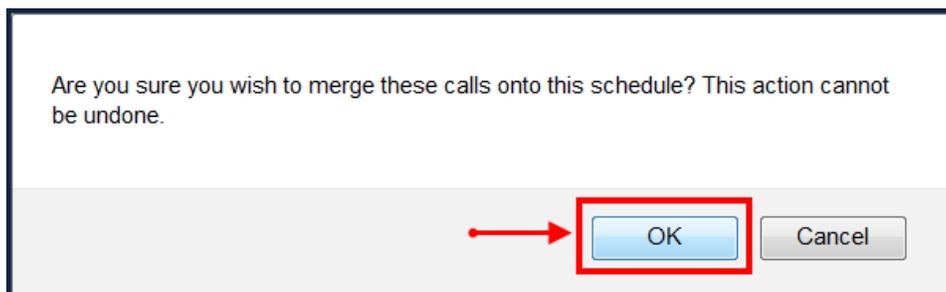
8. Select the desired split call to merge to the schedule.

9. Click on the **Merge** button.

A message will appear asking if you are sure you wish to merge this calls.



10. Click on **OK**. A *Reason Code* pop up screen is displayed.



11. Select the desired Reason Code.

12. Click **Save**.

Your calls will now merge on the **Santrax Maintenance** screen. Please note that there may be additional exceptions after the merge that need to be addressed.