



Sandata

Get more right from the start

Connecticut Department of Mental Health and
Addiction Services

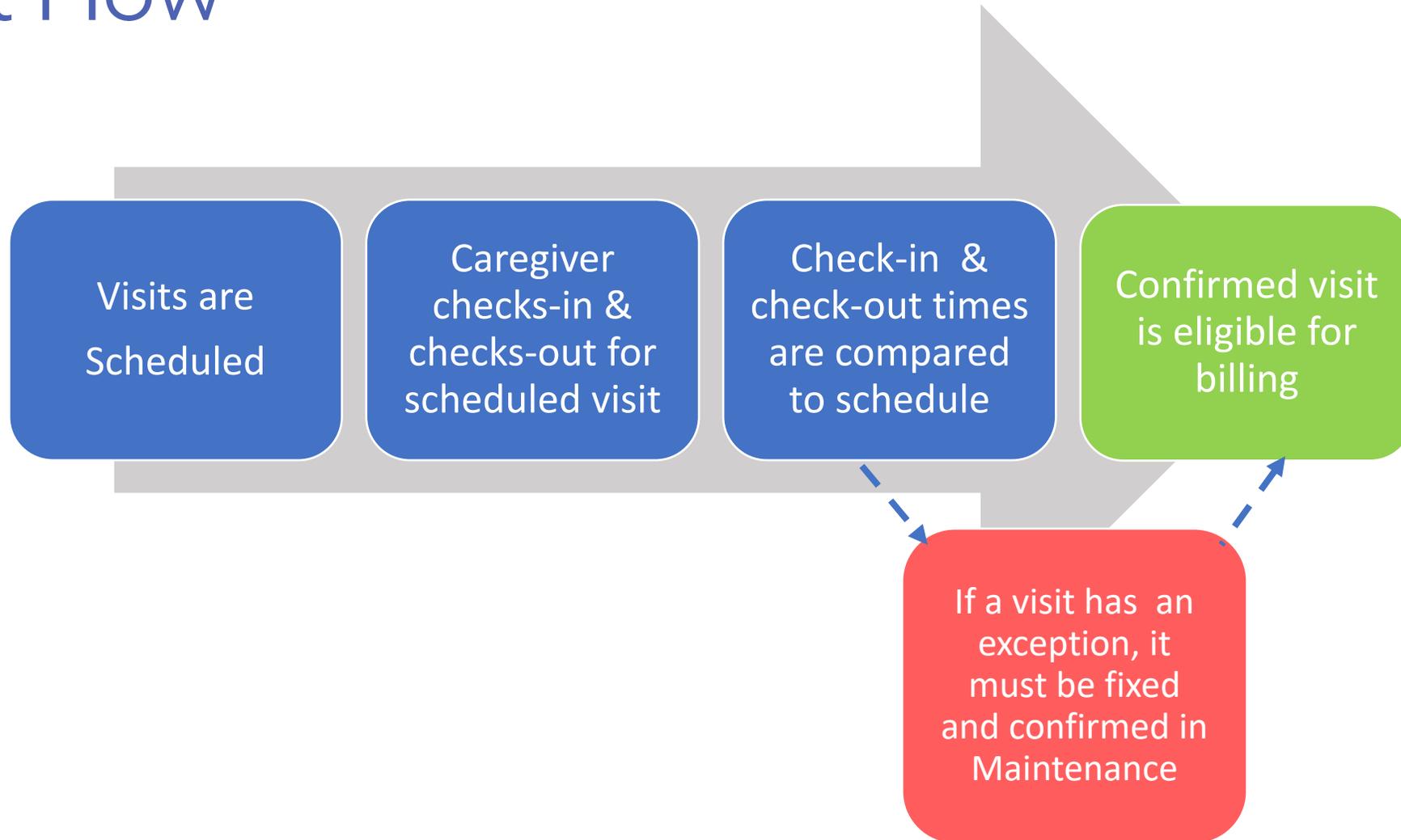
Electronic Visit Verification (EVV) Provider Training
Visit Maintenance Module



Agenda

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

Visit Flow



Call Tolerance, Matching & Visit Rounding

Call time tolerance has been increased to 30 minutes before and after the schedule to reduce exceptions.

Non-skilled visits have a 2 hour window, before and after the schedule for calls to link to the schedule.

Skilled visits have a 4 hours window, before and after the schedule for calls to link to the schedule.

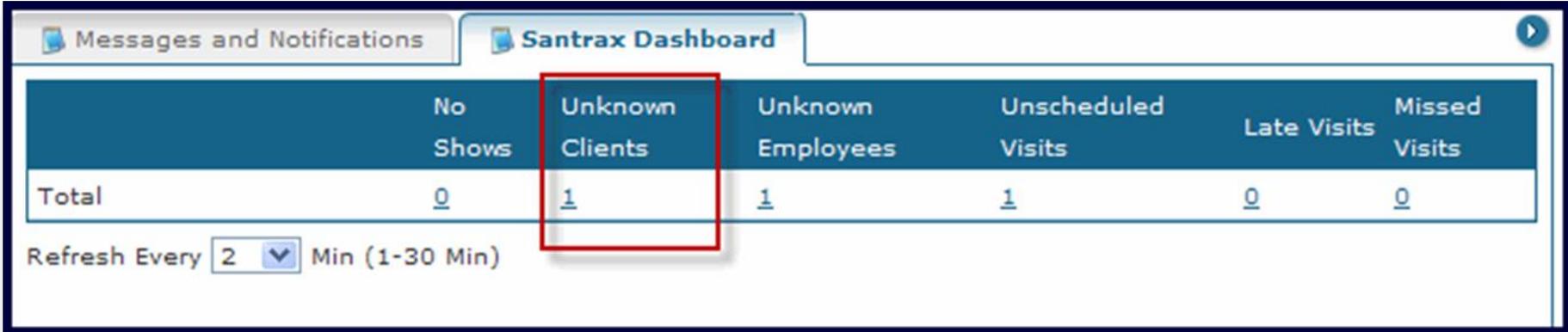
The duration of a visit (actual hours) is rounded to the nearest quarter hour to calculate bill/pay hours.

- ▶ 7 minutes and less rounds down
- ▶ 8 minutes and greater rounds up



Santrax Dashboard

- ▶ 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.



The screenshot shows the Santrax Dashboard interface. It features a table with the following data:

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

Below the table, there is a refresh rate control: "Refresh Every 2 Min (1-30 Min)". The number "2" is in a dropdown menu.



Exceptions

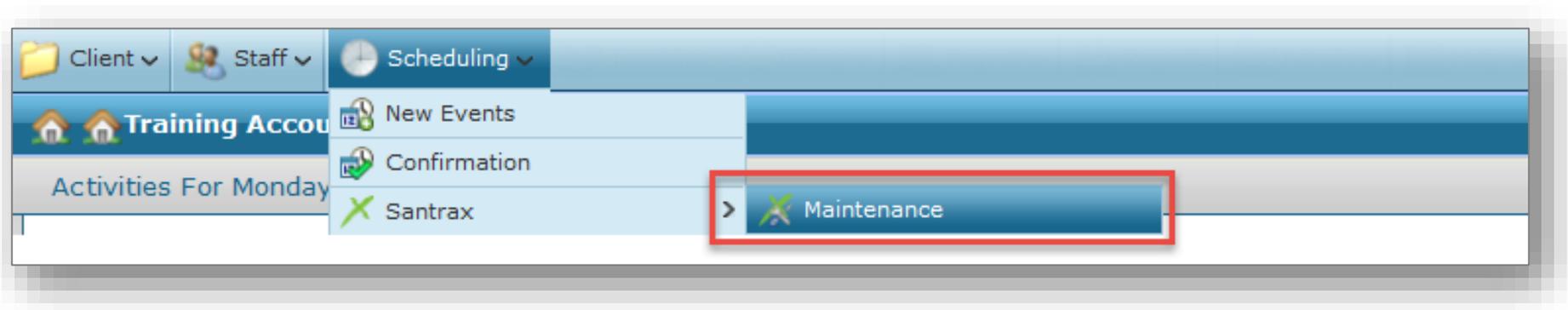
- ▶ The most frequent exceptions are as follows:

Exception	Description
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 **Santrax 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



Maintenance Screen Filters

The screenshot shows the 'Santrax Maintenance' application window. The top bar includes 'Clear Filter', 'FVV', 'Refresh', 'Print PDF', and 'Close' buttons. The main area is divided into several sections:

- Search Filters:** A section with an arrow icon to hide filters. It contains fields for Client, Admission, Staff, Company, Location, Admit Type, Team, Region, Exception, Payor #, Payor, and Call Type. Each field has a search icon (magnifying glass) and a clear icon (X).
- Coordinator:** A multi-select list showing 'TestUser, Rosanna', 'TestUser, Sonia', 'TestUser, Valentina', and 'Wonka, Will' (selected).
- Date Range:** Fields for 'Date From' and 'Date To', both set to '03/31/2021', with a calendar icon.
- Time Range:** A field for 'Time Range'.
- Status Legend:** A legend box showing 'Pending' (blue), 'Confirmed' (green), 'Closed' (red), 'Hold' (yellow), 'In-Process' (purple), and 'Cancelled' (orange).
- Calendar:** A calendar for March 2021 showing dates from 28 to 10.
- Filters:** A list of checkboxes: 'Hide Cancelled Events' (checked), 'Only Events With Calls' (unchecked), 'Only Exceptions' (unchecked), 'Santrax Clients Only' (checked), 'Auto Update Schedules' (unchecked), 'Hide Prior Day Visits' (unchecked), and 'Exclude Unknown Clients' (checked).
- Table Header:** A table header with columns: 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, and Exceptions. The text 'As Of:' is visible to the right of the header.

- Arrow icon to hide search filters
- Client: search using advanced options
- Admission: search by client last name
- Staff: Employee last name
- Staff ID: Employee Agency ID
- Coordinator: Multi-select list
- Status: Pending, Hold, In-Process, etc.
- Date: Enter from and To dates
- Exclude Unknown Clients: Uncheck to include unidentified client calls



Santrax Maintenance - Column Headings

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

Bill Hrs	Total hours used for billing
Pay Hrs	Total hours used for pay
Auth	Authorization Limits (Y=yearly, M=monthly, W=weekly, D= Daily, N=none)
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



Maintenance Screen Sorting & Navigating

Click column headers to sort by the selected column

- ▶ Click again to reverse sort
- ▶ Pointer in the column header indicates the data is being sorted by that column

Total Shown: 80

O	Date	Coord	Client	Service	Staff	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs
	01/13/16-We	009	EHATA, AMIR F	HHA	SANJOS, ADA	12:00	16:00	4.00			
	01/13/16-We	009	STAING, VICTOR		HOWLAND, AKIDA			0.00	08:54		
	01/13/16-We	009	CRESCENZO, RO	HHA	ROBINSON, SHAKIHA	09:00	11:00	2.00	09:18		
	01/13/16-We	009	CRESCENZO, RO	HHA	ROBINSON, SHAKIHA	11:00	13:00	2.00			
	01/13/16-We	009	IVA, MARYANN	HHA	ROBINSON, SHAKIHA	13:00	17:00	4.00			
	01/13/16-We	009	INTANILLA, CHRI	HHA	RICHARDSON, DEEREE	10:00	19:00	9.00			

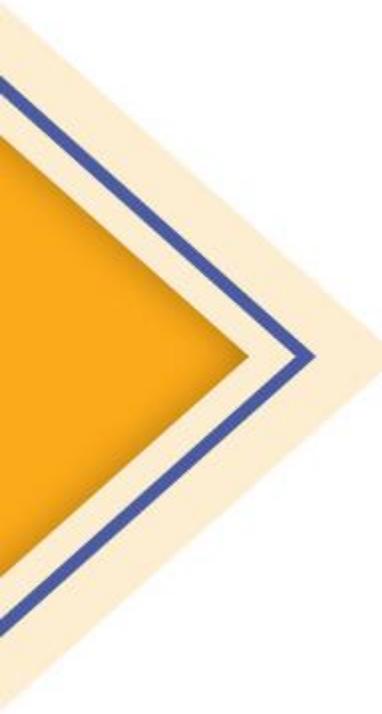
Use the page controls at the bottom of the screen to set the number of lines per page or jump to a specific page



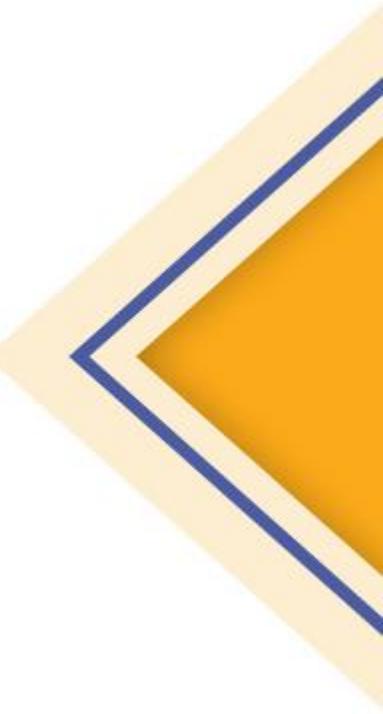
Sorting & Navigating

- ▶ 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.





Identifying and fixing exceptions



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 client.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Au
03/29/21-Mo		(516) 983-9625		Alexander, Frank	HHA	--	--		0.00	13:40	14:45	1.08	1.08	1.08	

- **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	Au
03/22/21-Mo		Rivas, Camille		000012034		--	--	C	0.00	08:40	09:45	1.08	1.00	1.00	



Exception Types

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

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

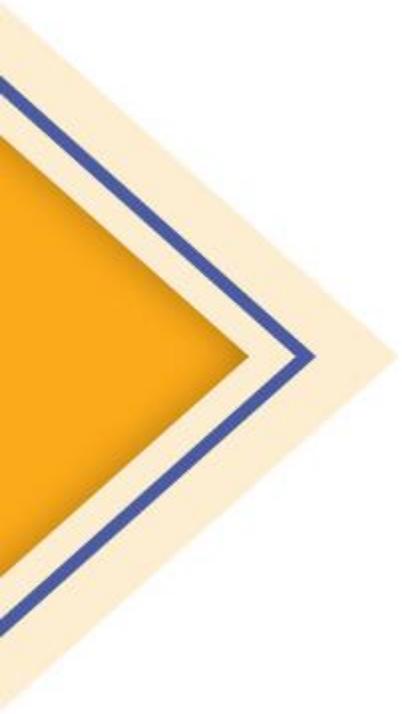
- **Missing call(s)** – Call Start or Call End is highlighted in red.

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

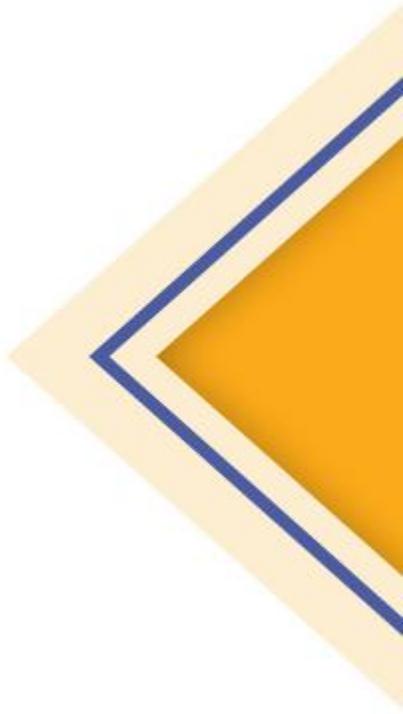
- **Pay Hrs different from Scheduled Hrs** – Aide worked more or less than scheduled. Scheduled Hrs and Pay Hrs will be highlighted in red.

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





Unknown Client Exception



Unknown Client Exception

- ▶ The caregiver calls from a phone number that is not in any client record.
- ▶ The unrecognized phone number appears in the client field instead of the client name.
- ▶ The number could be an additional line for client, change of number, or caregiver called from appointment pick-up/drop-off.
- ▶ This call appears on a separate line and does not link to the scheduled visit.



Unknown Client

Fixing the Exception

Best Practices:

- ▶ Before fixing the exception, verify with client that services were provided.
- ▶ Check why the caregiver called from an unknown number.
- ▶ If the unknown number is valid for the client, add it to the client profile.
- ▶ When fixing the exception, always merge the call to the schedule so calls and schedule are together on one line.
- ▶ Remind caregivers that they cannot use their cell phone to check-in/ check-out unless they are using the mobile app (MVV).

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Au
03/29/21-Mo		(516) 983-9625		Alexander, Frank	HHA	--	--		0.00	13:40	14:45	1.08	1.08	1.08	



Unknown Client

Fixing the Exception – continued

1. Filter the visit data for a specific caregiver or click the Staff column heading to sort visits in staff order.
2. Locate the schedule and line with the call exception (*usually above or below the schedule line*).

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth
03/29/21-Mo		(516) 983-9625		Alexander, Frank	HHA	--	--		0.00	13:40	14:45	1.08	1.08	1.08	
03/29/21-Mo		Smith, Evelyn	HHA	Alexander, Frank	HHA	13:45	14:45		1.00				-	-	

3. Left-click on the schedule line to highlight the line.
4. Right-click on the schedule line again and click the **Merge Calls** pop-up.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth
03/29/21-Mo		(516) 983-9625		Alexander, Frank	HHA	--	--		0.00	13:40	14:45	1.08	1.08	1.08	1
03/29/21-Mo		Smith, Evelyn	HHA	Alexander, Frank	HHA	13:45	14:45	C	1.00						

Merge Calls

Navigate to: ▶



Unknown Client

Fixing the Exception - continued

5. Left-click on the unknown call time.
6. Click the **Merge** button at the top right corner of the screen.

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	03/29/2021 - Mon	(516) 983-9625	Alexander, Frank	13:40	14:45			Unscheduled Event, Unknown

7. Click **OK** to confirm you wish to merge the call to the schedule.

Are you sure you wish to merge these calls onto this schedule? This action cannot be undone.

7 OK Cancel



Unknown Client Fixing the Exception - cont'd

8. Call time is merged to schedule line and bolded. Bill and Pay hours are calculated.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
02/07/17-Tu		(516) 484-4400		Snavely, Dennise	HHA	--	--		8.00	13:13	14:17	1.07	1.07	1.07
02/07/17-Tu	STX	CARSON, MARIE	1021Z	Snavely, Dennise	HHA	14:30	15:30		1.00	14:31	15:28	0.95	1.00	1.00

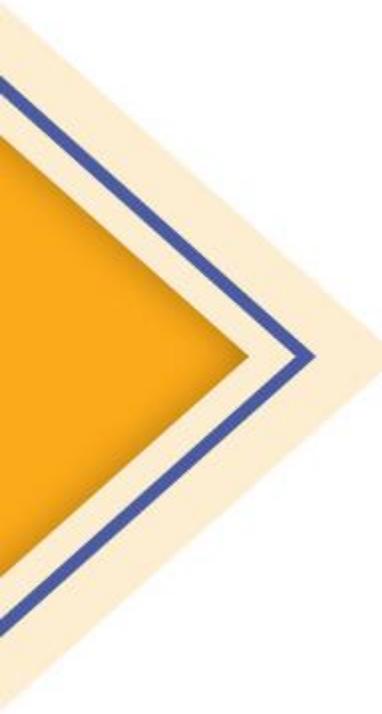
9. Check the Override box (**Ovrd**) on the line to accept the Bill/Pay hours then click **Save** in upper-right corner of the screen and select a reason code to confirm the visit.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Aut	P->A	Ovrd	Re
02/07/17-Tu		(516) 484-4400		Snavely, Dennise	HHA	--	--		0.00	13:13	14:17	1.07	1.07	1.07			<input type="checkbox"/>	
02/07/17-Tu	STX	CARSON, MARIE	1021Z	Snavely, Dennise	HHA	14:30	15:30		1.00	14:31	15:28	0.95	1.00	1.00			<input checked="" type="checkbox"/>	

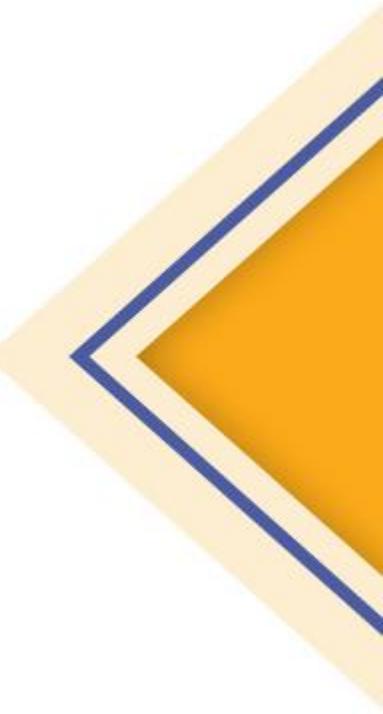


Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
02/07/17-Tu	STX	CARSON, MARIE	1021Z	Snavely, Dennise	HHA	14:30	15:30		1.00	14:31	15:28	0.95	1.00	1.00





Unknown Employee Exception



Unknown Employee Exception

- ▶ The Santrax ID entered by the caregiver does not match to any staff in the system.
- ▶ The ID entered on the call is displayed in the Staff field instead of the caregiver's name.
- ▶ This exception happens when a caregiver enters their Santrax ID incorrectly.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Au
03/22/21-Mo		Rivas, Camille		000012034		--	--	C	0.00	08:40	09:45	1.08	1.00	1.00	



Unknown Employee Fixing the Exception

Best Practices:

- ▶ Before fixing the exception, verify with client that services were provided.
- ▶ Remind the caregiver of their correct Santrax ID.
- ▶ When fixing the exception, always merge the call to the schedule so calls and schedule are together on one line.



Unknown Employee

Fixing the Exception – continued

1. Filter the visit data for a specific client or click the Client column heading to sort visits in client order.
2. Locate the schedule and line with the call exception (*usually above or below the schedule line*).

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	A
03/22/21-Mo		Rivas, Camille		000012034		--	--	C	0.00	08:40	09:45	1.08	1.00	1.00	
03/22/21-Mo		Rivas, Camille	17HC	Chavez, Patsy	HHA	11:30	12:30		1.00				-	-	

3. Left-click on the schedule line to highlight the line.
4. Right-click on the schedule line again and click the **Merge Calls** pop-up.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	A
03/22/21-Mo		Rivas, Camille		000012034		--	--	C	0.00	08:40	09:45	1.08	1.00	1.00	
03/22/21-Mo		Rivas, Camille	17HC	Chavez, Patsy	HHA	11:30	12:30	C	1.00				-	-	

Merge Calls

Navigate to: ▶



Unknown Employee Fixing the Exception – continued

5. Left-click on the unknown staff call time.
6. Click the **Merge** button at the top right corner of the screen.

Merge Calls Refresh Merge Split

Search Filters

Exception:

Client:

Staff:

Client Phone Match

Schedule Info

Client: **Rivas, Camille** Date: **03/22/2021**

Staff: **Chavez, Patsy** Time IN: **11:30**

Service: **17HC** Time OUT: **12:30**

Time Zone: **C**

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	03/22/2021 - Mon	Rivas, Camille	000012034	08:40	09:45	C		Unscheduled Event, Unknown

7. Click **OK** to confirm you wish to merge the call to the schedule.

Are you sure you wish to merge these calls onto this schedule? This action cannot be undone.



Unknown Employee

Fixing the Exception – continued

8. Call time is merged to schedule line. Bill and Pay hours are calculated.
- If actual hours is within allowed rounding, the visit automatically appears in green (confirmed).
 - If the actual hours is more or less than scheduled, or there are other exceptions then additional review is needed.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Au
03/22/21-Mo		Rivas, Camille	17HC	Chavez, Patsy	HHA	11:30	12:30	C	1.00	08:40	09:45	1.08	1.00	1.00	



Unknown Employee Fixing the Exception – continued

If the calculated hours are correct but need to be confirmed:

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth
03/22/21-Mo		Rivas, Camille	17HC	Chavez, Patsy	HHA	11:30	12:30	C	1.00	08:40	09:45	1.08	1.00	1.00	

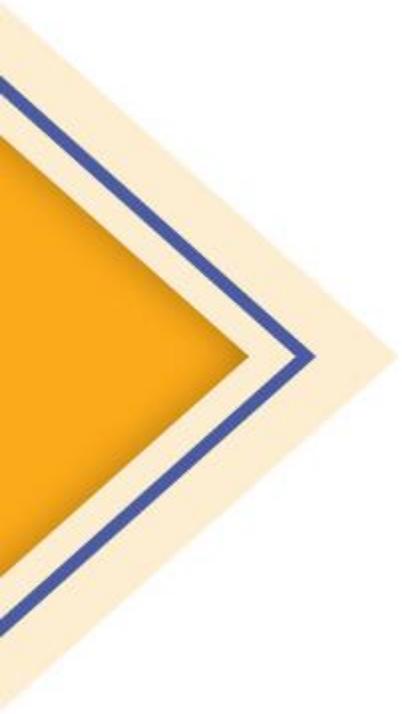
Check the Override box (**Ovrd**) on the line to accept the Bill/Pay hours then click **Save** in upper-right corner of the screen and select a reason code to confirm the visit.

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	R
03/22/21-Mo		Rivas, Camille	17HC	Chavez, Patsy	HHA	11:30	12:30	C	1.00	08:40	09:45	1.08	1.00	1.00				<input type="checkbox"/>	<input checked="" type="checkbox"/>

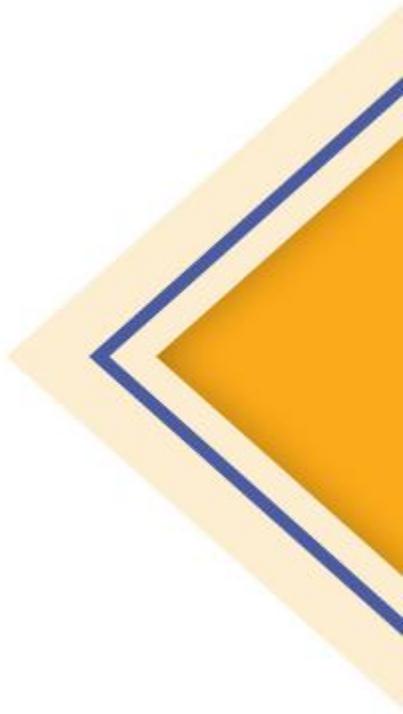


Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth
03/22/21-Mo		Rivas, Camille	17HC	Chavez, Patsy	HHA	11:30	12:30	C	1.00	08:40	09:45	1.08	1.00	1.00	





Unscheduled Visit Exception



Unscheduled Visit Exception

- ▶ Start and End calls received but not matched to a schedule.
- ▶ Dashes appear in **Scheduled Start** and **End** cells.
- ▶ Exception could be due to:
 - Visit not scheduled in the system
 - Visit is scheduled but caregiver works off too far off schedule



Unscheduled Visit Fixing the Exception

1. Double click on the unscheduled visit line to open the Schedule Detail screen.
2. Enter the **Service**, **Event code** and **Proposed Times**.
3. Click **Save** at the bottom of the screen and select the appropriate Reason Code when prompted.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	A
02/08/17-We	111	DIAZ, MARIA		Snavelly, Dennise	HHA	--	--		0.00	01:38	02:05	0.45	0.50	0.50	

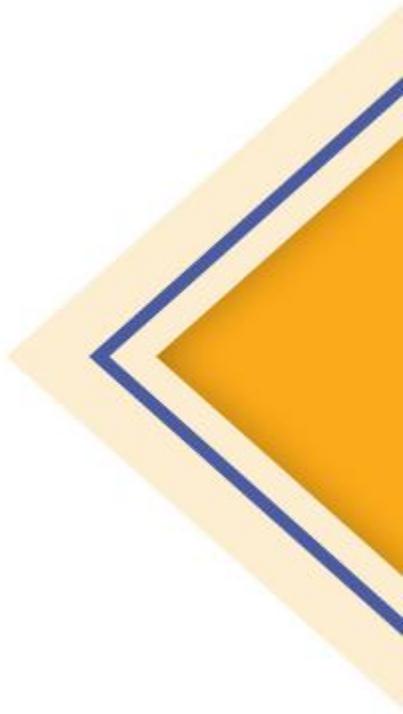
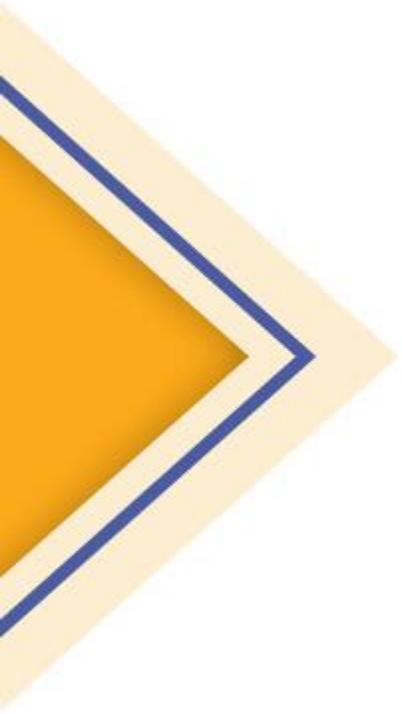
The screenshot shows the 'Schedule Detail' window with several fields highlighted by red boxes and numbered with green circles:

- 1**: A green circle highlights the 'Sch End' field in the table above, which is currently empty.
- 2**: A green circle highlights the 'Service' dropdown menu in the 'General' section.
- Another red box highlights the 'Event Code(s)' list, which currently contains 'ZZ- Default (Modifier specified in Billing)'.
- A third red box highlights the 'Proposed' time fields, which are currently empty.

The 'General' section includes fields for Date (02/08/2017 - Wed), Company (CT Home Care Agency 1), Location (Hartford), PoS, and Shift Group (Hartford No Shift). The 'Status' is '09- Hold'. The 'Times' section shows 'Santrax' (01:38 to 02:05, 0.5 hrs) and 'Adjusted' (01:38 to 02:05, 0.5 hrs). The 'Associated Totals' section shows Miles: 0.00, TT Bill: 0, and TT Pay: 0.



Merging Calls



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

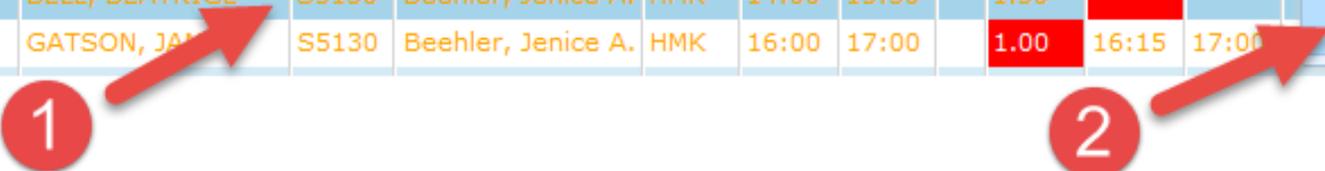
Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
	(646) 533-8500		Beehler, Jenice A.	HMK	--	--		0.00	16:21			-	-
111	BELL, BEATRICE	S5130	Beehler, Jenice A.	HMK	14:00	15:30		1.50				-	-



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

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



The screenshot shows a table with columns for Coord, Client, Service, Staff, Pos, Sch Start, Sch End, TZ, Sch Hrs, Call Start, Call End, Act Hrs, Bill Hrs, Pay Hrs, and Au. The second row has a red background for the Client cell. The third row has a blue background. A 'Merge Calls' button is overlaid on the third row's Call End cell.



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

The screenshot shows the 'Merge Calls' interface. At the top right, there are buttons for 'Refresh', 'Merge', and 'Split'. The 'Merge' button is highlighted with a red circle and the number 4, with an arrow pointing to it. On the left, there are search filters for Exception, Client, and Staff, with a 'Client Phone Match' checkbox. On the right, there is 'Schedule Info' for Client: BELL, BEATRICE, Staff: Beehler, Jenice A., Date: 05/05/2016, Time IN: 14:00, and Time OUT: 15:30. Below this is a table of calls. The second row of the table is highlighted with a red box and a red arrow pointing to it, with a red circle and the number 3 next to it. The table has columns for O, Date, Client, Staff, Call Start, Call End, TZ, Tasks, and Exceptions.

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



Splitting Paired Unknown Calls to Merge

When paired, unknown calls need to be applied individually to separate schedules.

1. Locate the paired unknown calls.
2. Left-click on the first schedule line that the call should be merged with.

In the example below, two calls were made from the same unknown number. The 13:42 call belongs to the visit for client Baskin and the 14:10 call belongs to the visit for client Espada.

Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	B
(718) 272-1489		Ross, Doug	HHA	--	--		0.00	13:42	14:10	0.47	
BASKIN, MARY	1021Z	Ross, Doug	HHA	11:30	13:45		2.25				
ESPADA, ESTHER	1021Z	Ross, Doug	HHA	14:00	15:00		1.00				



Splitting Paired Unknown Calls to Merge

3. Right-click on the schedule line and choose **Merge Calls**.
4. Left-click on the paired unknown calls line to highlight the line.

Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	A
(718) 272-1489		Ross, Doug	HHA	--	--		0.00	13:42	14:10	0.47	0.47	0.47	
BASKIN, MARY	1021Z	Ross, Doug	HHA	11:30	13:45		2.25					-	
ESPADA, ESTHER	1021Z	Ross, Doug	HHA	14:00	15:00		1.00					-	

3

Merge Calls Refresh Merge Split

Search Filters

Exception:

Client:

Staff:

Client Phone Match

Schedule Info

Client: **BASKIN, MARY** Date: **02/10/2017**

Staff: **Ross, Doug** Time IN: **11:30**

Service: **1021Z** Time OUT: **13:45**

Time Zone:

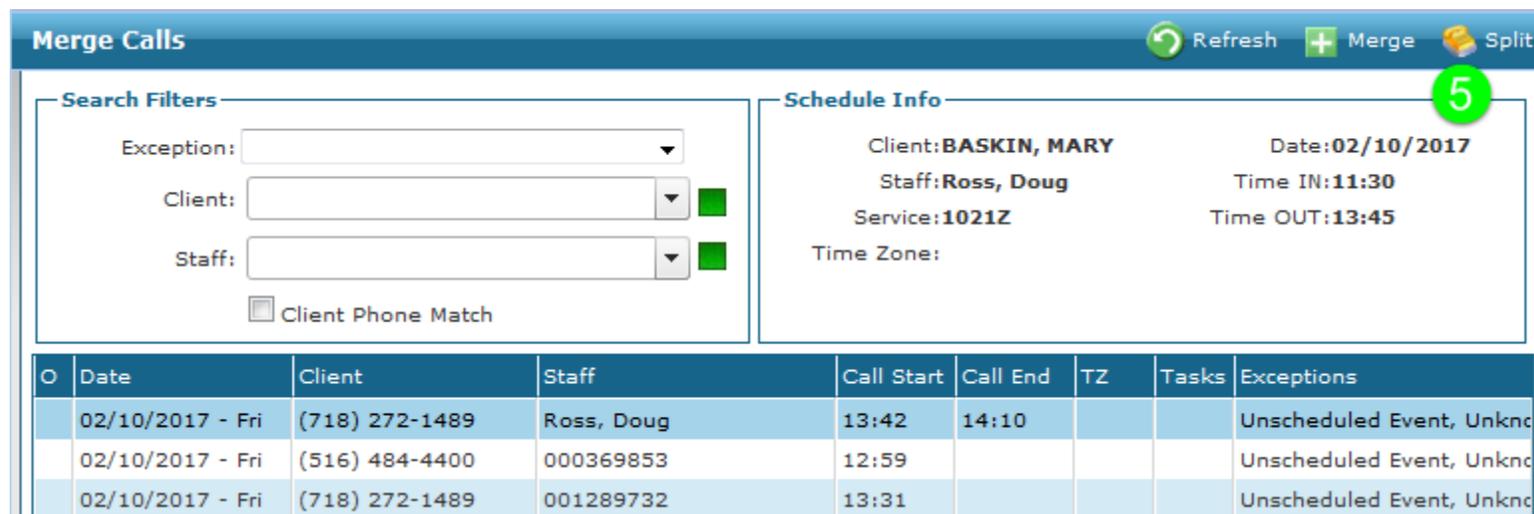
O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	02/10/2017 - Fri	(718) 272-1489	Ross, Doug	13:42	14:10			Unscheduled Event, Unknc
	02/10/2017 - Fri	(516) 484-4400	000369853	12:59				Unscheduled Event, Unknc
	02/10/2017 - Fri	(718) 272-1489	001289732	13:31				Unscheduled Event, Unknc

4



Splitting Paired Unknown Calls to Merge

1. Click **Split** in upper-right corner of the window and click **OK** to confirm split.



The screenshot shows a software interface titled "Merge Calls". At the top right, there are three buttons: "Refresh" (circular arrow icon), "Merge" (plus sign icon), and "Split" (orange square icon). A green circle with the number "5" is overlaid on the "Split" button. Below the buttons are two main sections: "Search Filters" and "Schedule Info".

Search Filters: Contains three dropdown menus for "Exception:", "Client:", and "Staff:". Below them is a checkbox labeled "Client Phone Match".

Schedule Info: Displays the following information:
Client: **BASKIN, MARY** Date: **02/10/2017**
Staff: **Ross, Doug** Time IN: **11:30**
Service: **1021Z** Time OUT: **13:45**
Time Zone:

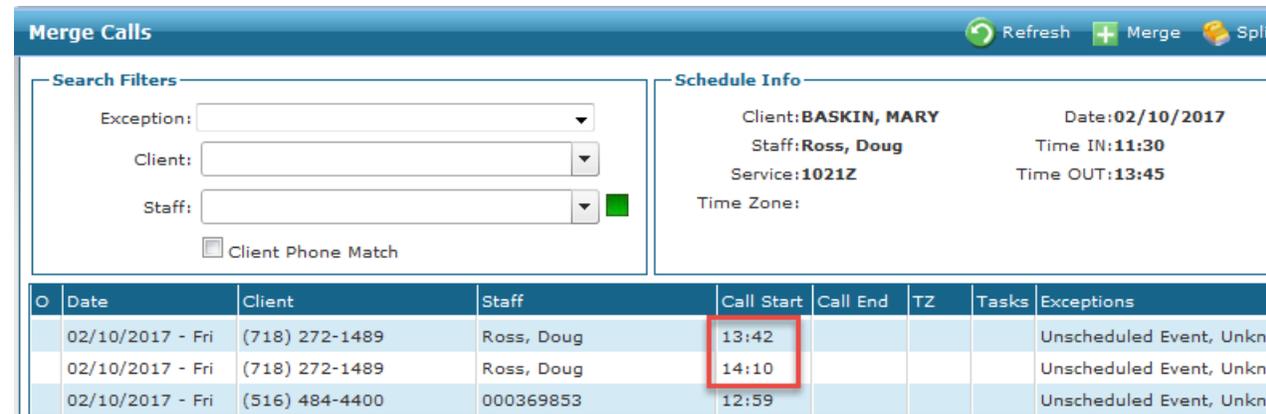
Below these sections is a table with the following data:

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	02/10/2017 - Fri	(718) 272-1489	Ross, Doug	13:42	14:10			Unscheduled Event, Unknc
	02/10/2017 - Fri	(516) 484-4400	000369853	12:59				Unscheduled Event, Unknc
	02/10/2017 - Fri	(718) 272-1489	001289732	13:31				Unscheduled Event, Unknc



Splitting Paired Unknown Calls to Merge

2. Calls will appear on separate lines.



The screenshot shows a 'Merge Calls' window with the following components:

- Search Filters:** Exception, Client, Staff, and a 'Client Phone Match' checkbox.
- Schedule Info:** Client: BASKIN, MARY; Date: 02/10/2017; Staff: Ross, Doug; Service: 1021Z; Time IN: 11:30; Time OUT: 13:45; Time Zone: (blank).
- Table:** A table with columns: O, Date, Client, Staff, Call Start, Call End, TZ, Tasks, Exceptions. The first two rows have 'Call Start' times of 13:42 and 14:10, which are highlighted with a red box.

O	Date	Client	Staff	Call Start	Call End	TZ	Tasks	Exceptions
	02/10/2017 - Fri	(718) 272-1489	Ross, Doug	13:42				Unscheduled Event, Unknc
	02/10/2017 - Fri	(718) 272-1489	Ross, Doug	14:10				Unscheduled Event, Unknc
	02/10/2017 - Fri	(516) 484-4400	000369853	12:59				Unscheduled Event, Unknc

3. Left-click on the first call (13:42) and click **Merge**.

4. Click **OK** to confirm and click **Save** when prompted for a reason code to save the change.



Splitting Paired Unknown Calls to Merge

5. Call is merged to the first schedule.

Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
(718) 272-1489		Ross, Doug	HHA	--	--		0.00	14:10			-	-
DIAZ, MARIA	1021Z	Ross, Doug	HHA	01:00	01:30		0.50	01:02	01:32	0.50	0.50	0.50
DIAZ, MARIA	1023Z	Ross, Doug	HHA	02:00	02:45		0.75	02:01	02:41	0.67	0.75	0.75
BASKIN, MARY	1021Z	Ross, Doug	HHA	03:00	03:30		0.50		03:29		0.50	0.50
ESPADA, ESTHER	1021Z	Ross, Doug	HHA	03:45	04:30		0.75	03:56			0.75	0.75
BASKIN, MARY	1021Z	Ross, Doug	HHA	11:30	13:45		2.25		13:42		-	-
ESPADA, ESTHER	1021Z	Ross, Doug	HHA	14:00	15:00		1.00				-	-

6. Click one the second schedule to merge the second call. After merging the second call, the schedules will show the split calls merged and bolded.

Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs
STX	BASKIN, MARY	1021Z	Ross, Doug	HHA	11:30	13:45		2.25		13:42		-	-
123	ESPADA, ESTHER	1021Z	Ross, Doug	HHA	14:00	15:00		1.00	14:10			-	-



Overriding Bill and Pay Hours

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

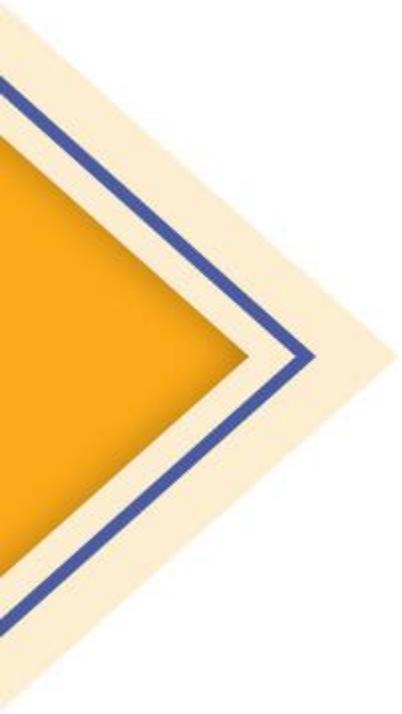
1. Double-click in the Pay column and type in the correct hours.

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
111	GATSON, JANET	S5130	Crandell, Melisa	HMK	11:30	12:30		1.00	11:45	12:36	0.85	0.75		N		<input type="checkbox"/>	<input type="checkbox"/>
111	GATSON, JANET	S5130	Crandell, Melisa	HMK	11:30	12:30		1.00		12:58		-	-	N		<input type="checkbox"/>	<input type="checkbox"/>

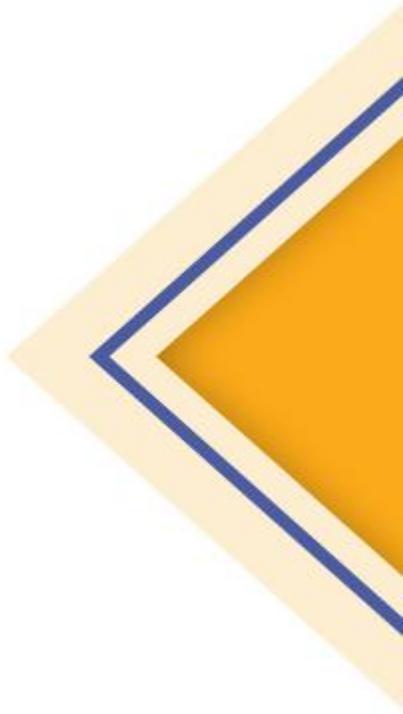
2. Check the Ovrd (Override) box to accept the calculated Pay hours.

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
124	LEATER, ALAN	S5125	Clarkson, Deena	CNA	15:30	16:30		1.00		16:34		-	-	N	2		<input type="checkbox"/>
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 type="checkbox"/>	<input checked="" type="checkbox"/>





Bill & Pay Hours Exceptions



Bill and Pay Hours Exceptions

When Bill/Pay hours do not match the scheduled hours for a visit, the exception reason would be:

- ▶ Payroll hours less than scheduled hours
- ▶ Actual hours more than scheduled hours



Bill and Pay Hours

Fixing the Exception

1. If the calculated Bill/Pay hours are correct and you want to confirm the visit for those hours, check the **Ovrd** (Override) box.
2. Click **Save** in the upper-right corner of the screen and select the appropriate reason code.

In the example below, the caregiver worked less hours than scheduled.

Before

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
CARSON, MARIE	1021Z	Snavelly, Dennise	HHA	22:00	22:45		0.75	22:44	23:18	0.57	0.50	0.50	N		<input type="checkbox"/>	<input checked="" type="checkbox"/>



After

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
CARSON, MARIE	1021Z	Snavelly, Dennise	HHA	22:00	22:45		0.75	22:44	23:18	0.57	0.50	0.50	N		<input type="checkbox"/>	<input type="checkbox"/>



Bill and Pay Hours

Fixing the Exception

1. If the calculated Bill/Pay hours are not correct and you want to confirm the visit for the scheduled hours, check the **P->A** box.
2. Click **Save** in the upper-right corner of the screen and select the appropriate reason code. (* Note: Override will automatically be checked)

In the example below, the visit is missing one call so worked hours could not be calculated.

Before

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
CARSON, MARIE	1021Z	Snavelly, Dennise	HHA	06:45	07:45		1.00	06:48			1.00	1.00	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DIAZ, MARIA	1023Z	Ross, Doug	HHA	07:00	08:00		1.00	06:59			-	-	N		<input type="checkbox"/>	<input type="checkbox"/>

After

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
CARSON, MARIE	1021Z	Snavelly, Dennise	HHA	06:45	07:45		1.00	06:48			1.00	1.00	N		<input type="checkbox"/>	<input type="checkbox"/>
DIAZ, MARIA	1023Z	Ross, Doug	HHA	07:00	08:00		1.00	06:59			-	-	N		<input type="checkbox"/>	<input type="checkbox"/>



Bill and Pay Hours Adjustment

- ▶ When the Bill/Pay hours need to be adjusted because:
 - Call time late because client was using the phone
 - Caregiver had to service client upon arrival
- 1. Double-click in the appropriate column and type in the correct number.
 - **Decimal points are not required for whole hours.**
- 2. Save to Confirm changes.

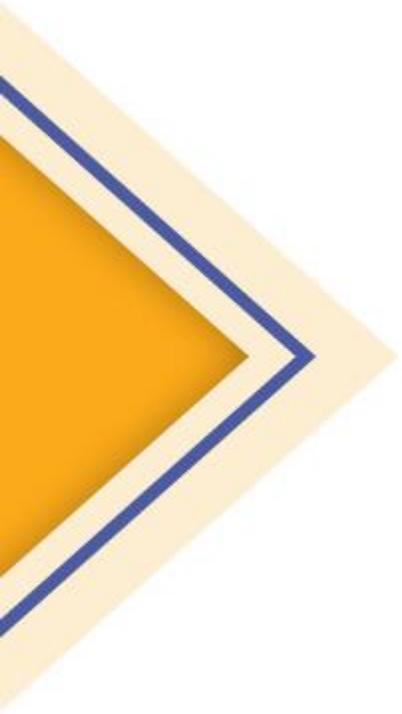
Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End	Act Hrs	Bill Hrs	Pay Hrs	Auth	Tasks	P->A	Ovrd
DOZARIO, FRANK	1021Z	Snavely, Dennise	HHA	10:00	11:00		1.00	10:02	10:13	0.18	.50				<input type="checkbox"/>	<input checked="" type="checkbox"/>



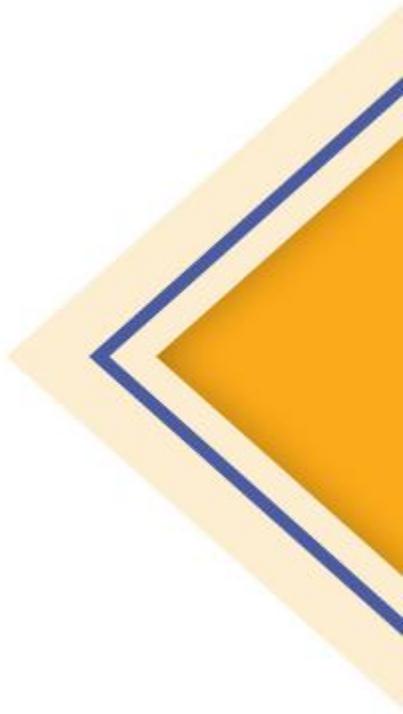
Demonstration: Visit Maintenance

- Filtering and viewing visits
- Correcting/Merging Unknown calls
- Adjusting Bill/Pay hour exceptions





Important schedule details



Call Log

- ▶ The Call Log tab shows all calls linked to the visit.
- ▶ If a caregiver calls multiple times within 7 minutes of each other, they may be linked to the same visit and will be listed here.

In the example below, the visit line only shows one call time but looking in the Call Log, there were two calls made.

Date	Coord	Client	Service	Staff	Pos	Sch Start	Sch End	TZ	Sch Hrs	Call Start	Call End
02/09/17-Th	111	DIAZ, MARIA	1021Z	Ross, Doug	HHA	09:30	10:30		1.00		10:40

Schedule Detail

General Documents:0 Call Log:2 Tasks:0

General

Date: 02/09/2017 - Thu

Service: 1021Z- Personal Care Services

Company: CT Home Care Agency 1

Location: Hartford

Call Log

Call From	Call Time	Client	Staff
7182633790	02/09/17 10:39 AM	DIAZ, MARIA	001280732
7182633790	02/09/17 10:40 AM	DIAZ, MARIA	001280732

Cancel: []

Times

Proposed: 09:30 10:30 = 1 hrs



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.

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

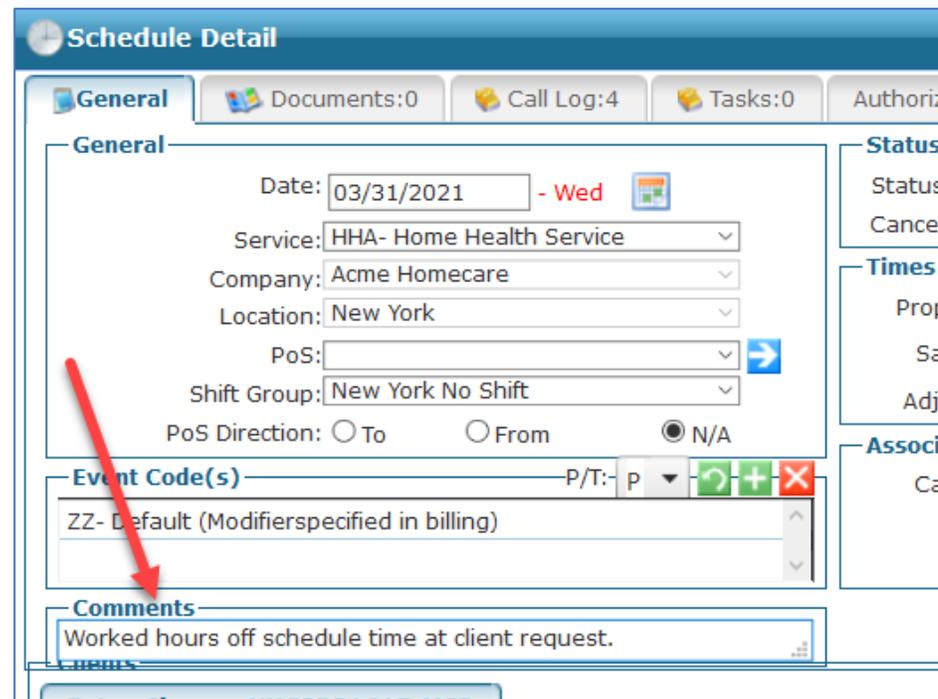
Note:

Task Note:



Adding Comments

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



The screenshot displays the 'Schedule Detail' window with the 'General' tab selected. The 'General' section contains the following fields:

- Date: 03/31/2021 - Wed
- Service: HHA- Home Health Service
- Company: Acme Homecare
- Location: New York
- PoS: (empty)
- Shift Group: New York No Shift
- PoS Direction: To From N/A

The 'Event Code(s)' section shows a list with one entry: 'ZZ- Default (Modifiers specified in billing)'. The 'Comments' section at the bottom contains the text: 'Worked hours off schedule time at client request.' A red arrow points from the 'Comments' section back to the 'Event Code(s)' section.



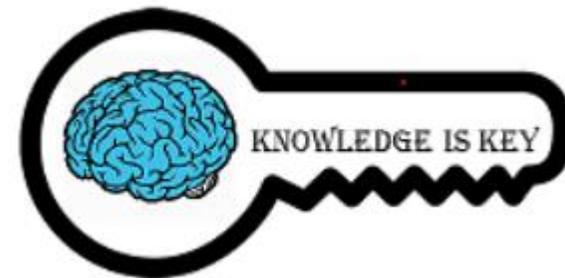
What You Have Learned

Accessing the Santrax Dashboard

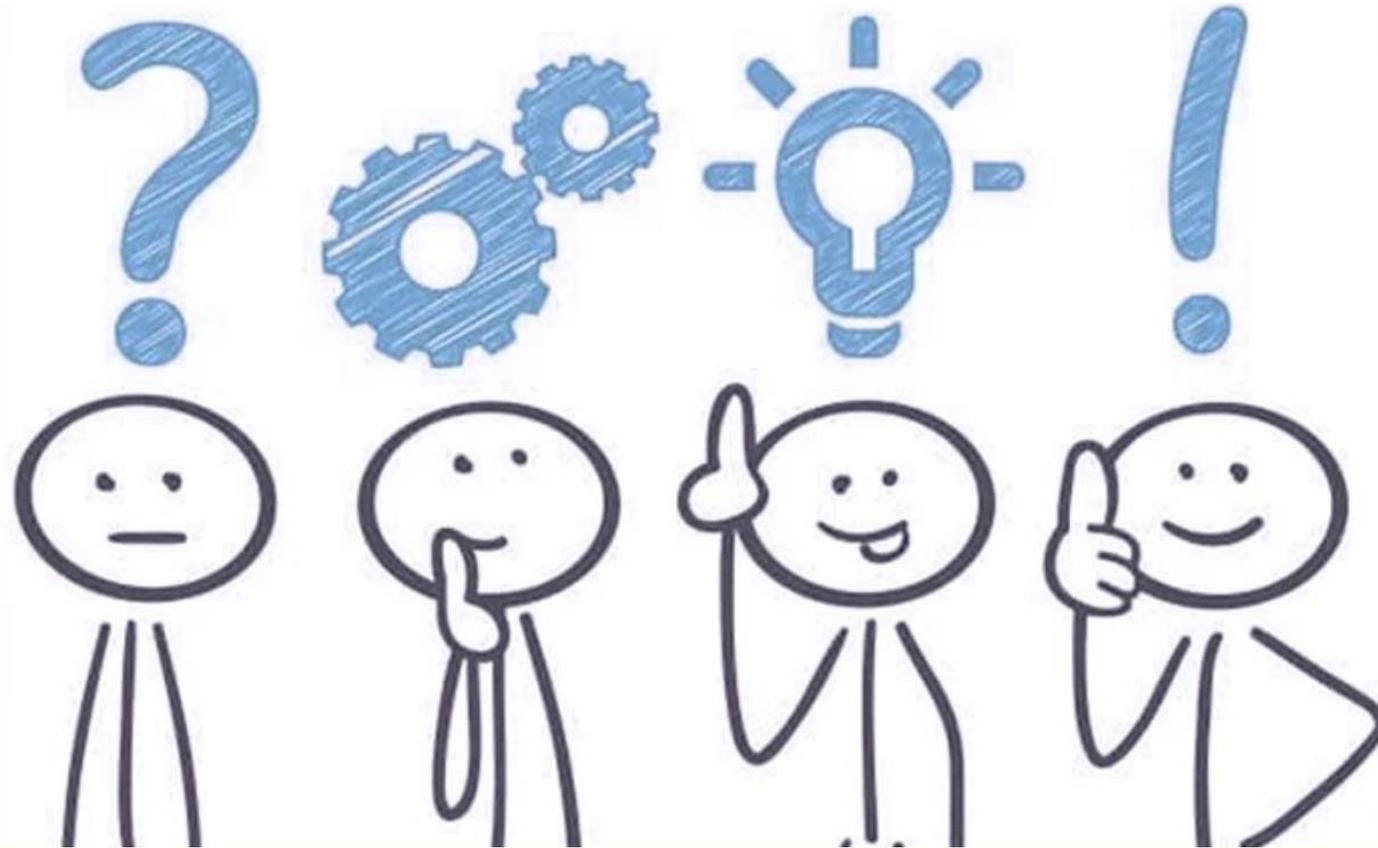
Understanding common types of exceptions

Accessing Santrax Maintenance and key functionality

- ▶ Sorting
- ▶ Merging Calls
- ▶ Manually Confirming Exceptions
- ▶ Overriding Bill and Pay Hours
- ▶ Adding Tasks
- ▶ Adding Comments



Questions...



How to Stay Connected

We look forward to working with you.

Please do not hesitate to reach out with questions, comments or suggestions as we move forward.

Website

www.ctdssmap.com

Email

ctcustomer@sandata.com

Telephone

1-855-399-8050

