Santrax Electronic Visit Verification
Fixed Visit Verification Device
Financial Management Services Agency/
Consumer Directed Employer
Installation and Call Training
Introduction

– Fixed Visit Verification (FVV) Device Installation
– FVV Calling Instructions

This training presentation is for Electronic Visit Verification (EVV) FVV only. Additional EVV training materials can be accessed via the DADS EVV website at http://www.dads.state.tx.us/evv/training.html
What is the purpose of this training?

This training is for Consumer Directed Services (CDS) Employers who will be installing the FVV Device in the home of the individual receiving services.

It also contains the FVV call process and instructions that CDS Employees will use to record FVV calls.
What you will learn

• How to assist an individual with installing an FVV Device in the home.
• How to use an FVV Device.
• How to make an FVV call for visit verification.
Important Notice Regarding Confidential Information

Please be advised that certain data fields required by the EVV system may contain protected health information under The Health Insurance Portability and Accountability Act (HIPAA) or other personal information under the privacy laws of the state.

Employees and/or agencies who have access to such information need to take appropriate safeguards to ensure such information is not disclosed without the consent of the individual or otherwise in accordance with applicable law.
Use of Medicaid ID as Client ID

- Individuals' Client IDs are used by CDS Employees as part of the FVV Call Process.

- DADS is aware that based on initial instruction, the FMSA may have used individuals' Medicaid IDs as Santrax Client IDs.

- Since the Santrax Client ID will need to be shared with CDS Employees and used as part of the FVV call process, DADS has determined that the Medicaid ID should NOT be used as the Santrax Client ID for individuals that receive an FVV Device.

- If you need to change Santrax Client IDs for your FMSA, please contact the toll-free Sandata Customer Service line at (855) 781-2079 for further instructions.
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FVV Device Request and Notification

• Your FMSA will make the request for the FVV Device.

• When your FMSA receives approval for the device, they will contact you to let you know that you will be receiving the device.

• If there are problems with your device, contact your FMSA for assistance.
Once a request has been approved, within five business days, the FVV package will be mailed to the CDS Employer. The FVV package will include everything you need to get started with the FVV Device.
Contents of the FVV Package for CDS Employers

• The FVV Device
• Double-sided tape for installation.
• A copy of the approved FVV request that your FMSA submitted. This document is for you to keep in your records.
• The FVV Registration Report which will list the device included in the package, by serial number; as well as the Client ID which is registered to the device. Please note the Client ID number on this form will be used for making FVV calls into Santrax.
• A copy of the Santrax EVV FVV Device Overview and Request Training materials. This training provides basic information about the device and the request process.
Contents of the FVV Package for CDS Employers
Continued

- A copy of the Santrax EVV FVV Device Installation and Call Training materials. This training provides information about how to install the device and train your CDS Employee(s) on its use.
- A copy of the Santrax EVV FVV Device Visit Maintenance and Report Training materials. This training provides information about how FVV Devices change the visit maintenance activities.
- The FVV Device Guide. This guide provides detailed information about FVV.
- The FVV Call Reference Guide. This booklet provides basic instructions that your CDS Employee(s) will use to make FVV calls.
- A pre-paid return envelope. This will allow you to return the FVV Device in the event it needs repair or is no longer needed.
CDS Employer Distribution

Sandata will ship the approved FVV Device package to the CDS Employer.

Upon receiving this package, there are a few things the CDS Employer will need to do:

• Conduct training with the CDS Employees providing services using this FVV Device. Training materials are included in the FVV Device package.

• Install the device. Sandata encourages you to use the double-sided adhesive tape provided to install the FVV Device in the location you choose.

• Have your CDS Employee begin using the FVV Device to verify visits immediately after installation.

• File the approved FVV Request Form in your records.
• Install the FVV Device in your home. You may place the device anywhere in your home as long as your CDS Employee(s) is able to get to it. Sandata recommends you use the tape that is provided.

• Train your CDS Employee(s) on how to use the FVV Device and how to make the FVV calls. To do this:
  – Review the training materials that were provided in your FVV Package with your CDS Employee(s).
  – Give your CDS Employee(s) the FVV Call Reference Guide to use when making FVV calls.

• Tell your CDS Employee(s) to begin using the FVV Device.

• Remember to use Santrax Visit Maintenance to verify your visit.
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Preparing To Use The FVV Device

• When the FVV package is received, all CDS Employees who will be using the FVV Device will need to be trained.

• Copies of the Santrax FVV Call Reference Guide should be distributed to all CDS Employees who will be using an FVV Device.

• The FVV Call Reference Guide outlines the use of the FVV Device and the Santrax call-in process.
FVV Calling Instructions

Upon Arrival:
When you arrive at the individual’s home, press and release the right button on the FVV Device and write down the 1st six-digit visit verification number displayed on the FVV Device’s screen. Note the date and time the button was pushed.

Upon Departure:
At the end of the visit, press and release the right button on the FVV Device and write down the 2nd six-digit visit verification number displayed on the FVV Device’s screen. Note the date and time the button was pushed.

NOTE: If you need to see the number again you may press and release the button one more time to display the reading.

*Do not hold the button down, always press and release.*
FVV calls can be made from any available telephone with the exception of the CDS Employer’s landline telephone.

Before calling into Santrax, make sure you have the following information:

- Your Santrax ID
- The individual’s ID (Client ID in Santrax)
- 1\textsuperscript{st} visit verification number, date and time of arrival. (obtained at the beginning of the visit)
- 2\textsuperscript{nd} visit verification number, date and time of departure. (obtained at the end of the visit)
- Once you have this information and the visit is complete, you are ready to call into Santrax!

Wait at least 15 minutes after you receive the second Visit Verification number to call into Santrax.

Call into Santrax within seven days of the visit time.
Making a Santrax FVV Call

1. **Dial one of the toll-free numbers assigned.**
   The Santrax system will say: **“Welcome, please enter your Santrax ID.”**
   
   *If you are experiencing difficulties with the primary toll-free number, please utilize the secondary toll-free number.*

2. **Press the numbers of your Santrax ID on the touch tone phone.**
   You also have the option to speak your Santrax ID slowly and clearly one digit at a time.

   When entered, Santrax will say: **“Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise press the pound (#) key to continue.”** *This is your FVV value prompt.*

3. **Press the star (*) key.**
   Santrax will say: **“Please enter first Client ID.”**
4. **Enter the Client ID.**
   Santrax will say: "Please enter your first visit verification number or press the pound (#) key to continue."

5. **Enter the first visit verification number.**
   *This is the first six-digit number you obtained from the FVV Device when you arrived at the individual’s home and will represent your time in call.*

   When the visit verification number is entered Santrax will confirm it by saying: “The first visit verification value is (DATE/TIME). If this is incorrect, press 1 to retry or press the pound (#) key to continue.”

   **NOTE:** Listen to verify that the date and time provided coordinate with the date and time the button on the device was pushed. If they don’t match, an incorrect visit verification number may have been entered. Press 1 to re-enter the number.

   *If re-entering the number does not create a match, contact your CDS Employer. Do not attempt to call into the system again for this call.*
6. Press the # key to continue. Santrax will say: "Please enter your second visit verification number or press pound (#) to continue."

7. Enter the second visit verification number. This is the six-digit number you obtained from the FVV Device at the end of the visit. It will represent your time out call.

When the visit verification number is entered Santrax will confirm it by saying: “The second visit verification value is (DATE/TIME)”. If this is incorrect, press 1 to retry or press the pound (#) key to continue.

NOTE: Listen to verify that the date and time provided coordinate with the date and time the button on the device was pushed. If they don’t match an incorrect visit verification number may have been entered. Press 1 to re-enter the number.

If re-entering the number does not create a match, contact your CDS Employer.

8. Hang up after Santrax confirms the second visit verification number.
In the FVV call process, after pressing the star (*) key to indicate an FVV call, the CDS Employee will be prompted to enter the Client’s ID.

"Please enter first Client ID."

If the Client ID is entered incorrectly, the CDS Employee will hear the following prompt:

“No FVV registered, please re-enter the client ID or press the pound key to continue."

The CDS employee should re-enter the correct Client ID, and will be prompted to continue the FVV call.

If the Client ID is not accepted after repeated attempts, the CDS Employee should hang up, contact the CDS Employer for the correct Client ID and try the call again.
Troubleshooting FVV Call - Incorrect FVV Values

• In the FVV call process, after entering the Client ID correctly, the CDS Employee will be prompted to enter the first FVV number:

• “Enter the first visit verification number.”
This is the first number the CDS Employee obtained from the FVV Device when he arrived at the individual’s home and will represent his time in.

• If the FVV number is entered incorrectly, the CDS Employee will hear the following prompt: “Invalid visit verification number, please try again.”

• The CDS employee should re-enter the correct FVV number, and then will be prompted to continue the FVV call.

• If the CDS employee does not successfully enter the correct FVV number, he should hang up and contact his CDS Employer to correct the visit using Santrax Visit Maintenance.
Troubleshooting FVV Call - No FVV Values Input

• In the FVV call process, after entering the Client ID correctly, the CDS Employee will be prompted to enter the first FVV number:

• “Enter the first visit verification number.”
This is the first number the CDS Employee obtained from the FVV Device when he arrived at the individual’s home and will represent his time in.

• If the CDS employee does not enter both FVV numbers, he will hear the following prompt: “You have not entered any visit verification numbers, press 1 to return or press the # key to continue.”

• The CDS employee should enter the FVV numbers if known, and then will be prompted to continue the FVV call.

• If the CDS employee does not know or has not successfully entered the FVV Numbers, he should hang up, and contact his CDS Employer to correct the visit using Visit Maintenance.
In this presentation, you have learned:

• How to install and use an FVV Device.

• How to use the visit verification numbers when calling into Santrax.

Should you have any questions contact Sandata at (855) 781-2079.
For additional FVV Device training, please access the additional training modules:

**FVV Device Overview Request Training (CDS):** Overview and request process.

**FVV Device Visit Maintenance Report Training (CDS):** FVV Device Visit Maintenance* and reporting in Santrax.

*Visit Maintenance is the call and schedule review function of Santrax.*