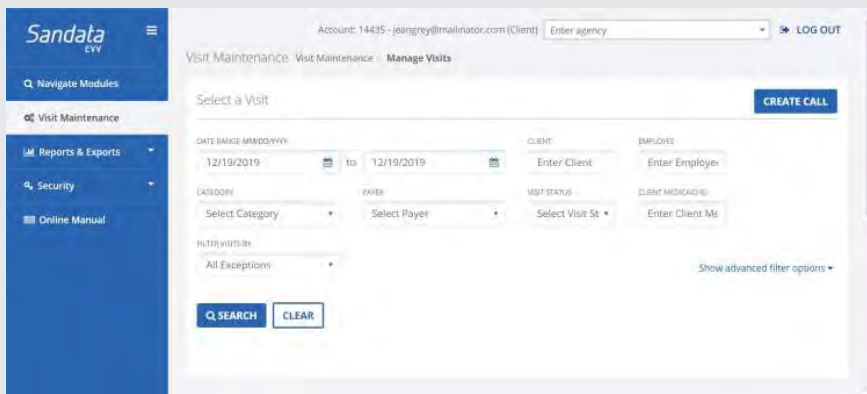




Using **Visit Maintenance**

To fix and acknowledge exceptions on the Sandata website



Log into the Sandata website. You will land on the visit maintenance screen.

1. Use the "all exceptions" filter to find visits with exceptions.
2. Use the date range filter to narrow your search, if needed.
3. Use the employee filter to narrow your search, if needed.

When the visits are displayed, a red dot will mean there is an exception to approve.

Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Bill Hours	Visit Status	Do Not Bill	Approved	Actions
PCA OVER-CFC/CHC	02/11/2019	●	10:08 AM							Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
NURSE TRAINING-CFC	02/05/2019		10:46 AM	03:53 PM	05:07			05:00	05:07	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
NURSE TRAINING-CFC	02/05/2019	●	08:56 AM							Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	

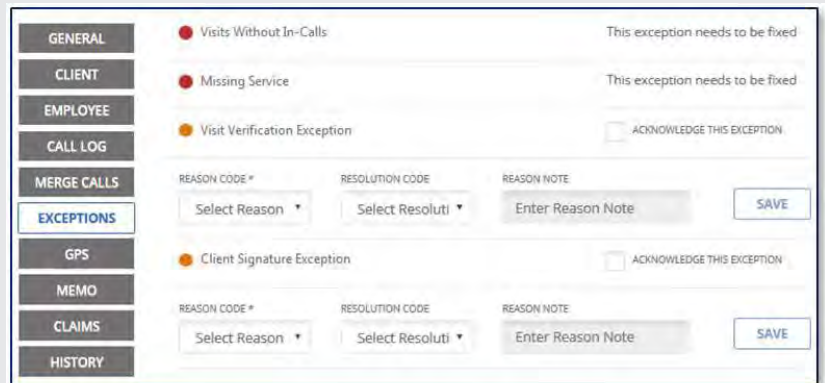
Click the edit icon to view details of the visit.

Most common reasons for an **Exception**

1. Client Signature, or voice recording, is missing.
2. Client did not verify the services provided at the end of the visit.
3. Services provided during the visit are missing.
4. The minimum number of tasks is missing.
5. Client has not verified the visit time at the end of a visit.
6. Visit was logged without a call-in or call-out time.

Exceptions that need to be **FIXED** will display a red dot.

Exceptions that need to be **ACKNOWLEDGED** will display an orange dot.

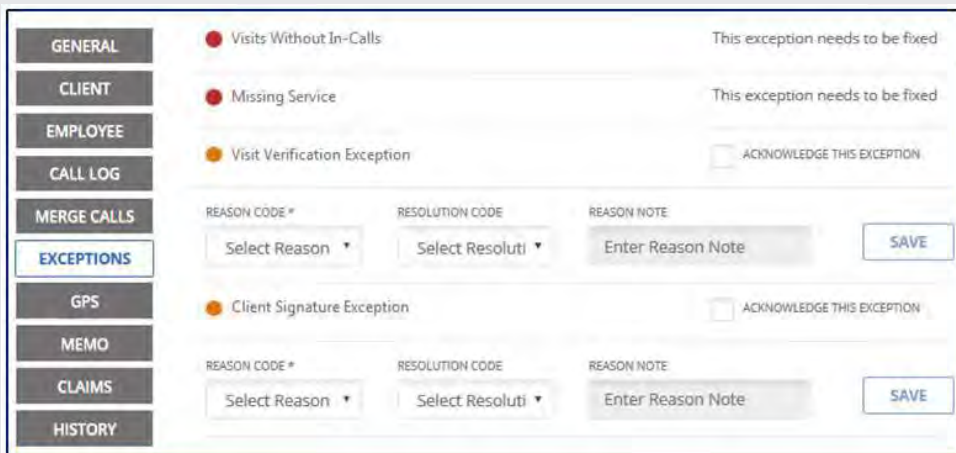


The screenshot shows a sidebar menu on the left with options: GENERAL, CLIENT, EMPLOYEE, CALL LOG, MERGE CALLS, EXCEPTIONS (highlighted), GPS, MEMO, CLAIMS, and HISTORY. The main area displays a list of exceptions:

- Visits Without In-Calls**: This exception needs to be fixed (Red dot)
- Missing Service**: This exception needs to be fixed (Red dot)
- Visit Verification Exception**: ACKNOWLEDGE THIS EXCEPTION (Orange dot)
- Client Signature Exception**: ACKNOWLEDGE THIS EXCEPTION (Orange dot)

Below the list are two forms for adding or editing exceptions, each with fields for REASON CODE * (Select Reason), RESOLUTION CODE (Select Resoluti), REASON NOTE (Enter Reason Note), and a SAVE button.

Acknowledging an Exception



This screenshot is identical to the previous one, but the checkbox next to 'Visit Verification Exception' is now checked, indicating it has been acknowledged.

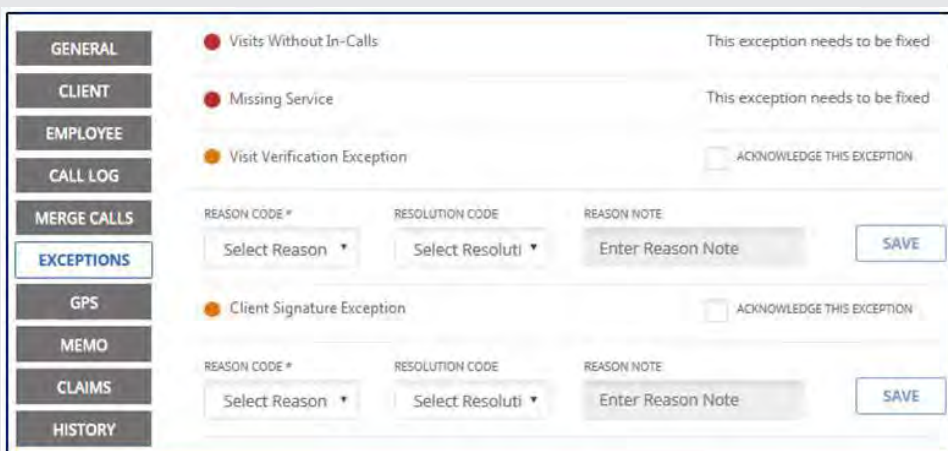
To acknowledge an exception, click the box next to “acknowledge this exception”.

Select a Reason Code and a Resolution Code from the drop-down menu.

*you may add an optional Reason Note

Click SAVE

Fixing an Exception



This screenshot is identical to the previous ones, but the status indicator for 'Visit Verification Exception' is now a red dot, indicating it has been fixed.

Fixing an exception requires clicking on it and completing or adding information.

If the shift is missing a call-in or call-out, you may either add a manual call or merge calls to fix the exception.

*See next page for instructions.

Manually Adding a Call

Follow this method if the call-in or call-out is missing.

Visit Details Visit From Date: 07/21/2021 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #

GENERAL

CLIENT

EMPLOYEE

AUTHORIZATIONS

EMPLOYEE SPEAKER VERIFICATION

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

CALL IN CLIENT ID# 1208631

CALL DATE: CALL TIME: 12:02 PM CALL TYPE: MVV (Mobile, GPS) SERVICE: PDCS-Services My Way

USER: LATITUDE: LONGITUDE: CALL SOURCE: SANDATA

TIME ZONE: America/New_York LOCATION: Home

Add Manual Call

* Indicates required field

CALL DATE * MM/DD/YYYY: CALL TIME * HH:MM AM/PM: SERVICE: TIME ZONE:

LOCATION *:

REASON CODE *: RESOLUTION CODE: REASON NOTE:

ADD

1. Click Call Log on the left side of the page.
2. Enter the call-in date & time, as well as the call-out date & time.
3. Select the reason code and resolution code and service.
*You may enter an optional reason note.
4. Click ADD

Merging Calls

Follow this method if the employee enters a wrong/bad Santrax ID or if the employee calls in or out **NOT** using a registered phone number.

Visit Details Visit From Date: 07/21/2021 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #

GENERAL

CLIENT

EMPLOYEE

AUTHORIZATIONS

EMPLOYEE SPEAKER VERIFICATION

CALL LOG

MERGE CALLS

Below is a list of all calls that are close to the scheduled time.

	PHONE #	CALL TIME	CALL DATE	CLIENT NAME	EMPLOYEE NAME
<input type="radio"/>	(202) <input type="text"/>	12:58 PM	7/20/2021	<input type="text"/>	<input type="text"/>
<input type="radio"/>	(202) <input type="text"/>	04:07 PM	7/20/2021	<input type="text"/>	<input type="text"/>
<input type="radio"/>	(202) <input type="text"/>	10:55 PM	7/20/2021	<input type="text"/>	<input type="text"/>
<input type="radio"/>	(202) <input type="text"/>	07:43 AM	7/21/2021	<input type="text"/>	<input type="text"/>
<input type="radio"/>	(202) <input type="text"/>	10:40 AM	7/21/2021	<input type="text"/>	<input type="text"/>

1. Click Merge Calls on the left side of the page.
2. If there are calls that can be merged, click the round button next to the visit line to select the call.
3. Select the reason code and resolution code.
*You may enter an optional reason note.
4. Click ADD