Document Scope
This document is to assist Connecticut DSS providers with a basic set up of the Santrax® Payer Management database. The procedures below discuss welcome kit components, login instructions, activating clients and reviewing client information, and entering staff.

Review your Welcome Kit
Review the contents of your welcome kit. It contains important information that will help you get started:

- Agency-specific Getting Started Brochure (GSB)
- Link to User Securities and Set Up Instructions job aid
- Agency-Specific Call Reference Guide (CRG)

System Check
1. Ensure that your equipment and internet connection meet the system requirements (available at [https://www.ctdssmap.com](https://www.ctdssmap.com)).
2. Disable your browser’s pop-up blocker. This process is different depending on the type of browser you have: Mozilla Firefox or Microsoft Internet Explorer.
3. Save the URL of your specific database as a favorite (also known as a bookmark) for easier access: Mozilla Firefox or Microsoft Internet Explorer.

Login to your Database – (System Administrator Oversight User)
You will need: Staff Maintenance job aid and User Roles and Security Groups job aid (available at [https://www.ctdssmap.com](https://www.ctdssmap.com)) and the Getting Started brochure included on your welcome kit.

1. Login to your database using the URL and the SPMUSER credentials listed on the Getting Started Brochure. Notes:
   A. The SPMUSER credentials should only be used once by the System Administrator Oversight User to create a user, login and password for the System Administrator Oversight User. After this, the SPMUSER should not be used. To learn more, please refer to the User Roles and Security Groups job aid available at [https://www.ctdssmap.com](https://www.ctdssmap.com).
   B. Do not make any modifications to the SPMUSER. The name and security settings for this user should always remain the same.

2. Follow the instructions on the Staff Maintenance job aid to create a user for the System Administrator Oversight User.
   A. Select the appropriate position, System Administrator Oversight.
   B. The status of this user should be Active.
   C. Make sure to check the Is A Manager flag and to enter the email address where alerts generated by the system will be sent.
   D. Set up this user’s security. The System Administrator Oversight user should have “System Administrator Oversight” as their group membership assigned in the Security section of their user’s profile. Instructions on setting up user security are available in the User Roles and Security Groups job aid.
Enter Staff
You will need: Staff Maintenance job aid and User Roles and Security Groups job aid (also available at https://www.ctdssmap.com)

1. Follow the instructions on the Staff Maintenance job aid to enter staff.
2. All staff should have status = “Active”
3. If applicable, set up the Security settings. Security settings such as username, password and group memberships can only be assigned by the System Administrator Oversight user.
   A. Staff delivering services = Caregiver
      (i) Positions: RN, LPN, HMK
      (ii) The status should be Active and compliant in order to be scheduled.
      (iii) Field staff may also be set up as system users.
   B. Office Staff that will have access to the system
      (i) Coordinators should be set up to receive the alerts that the system generates. Make sure to check the Is A Coordinator flag and to enter the email address where the alerts will be sent.
      (ii) All other office staff should be made active and have the appropriate security settings set up.
      (iii) Users who are not also acting as a field worker must be assigned the Position of Office Staff.

Set Up your Clients
You will need: Client Maintenance job aid (available at https://www.ctdssmap.com)

1. Client information is sent to your database automatically. You will not be able to enter new Clients. Go to the Clients module and ensure all your Clients are listed there.
2. All Clients will have Pending status, which indicates that these are new Clients in the database. Before you can schedule visits for your Clients:
   A. In the General folder of the Client's Electronic Health Record:
      (i) Change the status to Active: The wizard will populate the Start of Care date.
      (ii) Select a Coordinator.
      (iii) Select/Enter the Primary Physician.
      (iv) If applicable, enter the agency-specific client ID in the MRN field. This will ensure that it is included on the 835
   B. To avoid EVV exceptions, in the client’s Personal screen, validate the client’s home phone number.
      (i) The Home phone number will be populated by the data feed from DSS.
      (ii) The Mobile, Work & Fax numbers are available for the agency to add other phone numbers they may have for the client.
      (iii) These phone numbers will not be overwritten by the DSS data feeds.
   C. In the Diagnosis folder of the Client's Electronic Health Record, enter the Diagnosis Code(s).