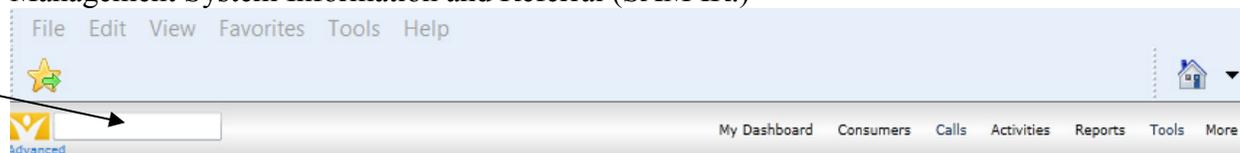


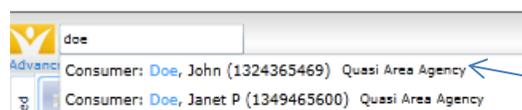
How to View Consumer Call Notes in SAMS IR

All ADRC staff can view notes from a consumer who has contacted the ADRC previously. In this manner the ADRC staff is aware of all previous contacts.

When a consumer calls, type the name of the consumer in the search bar in Social Access Management Information and Referral (SAM IR.)



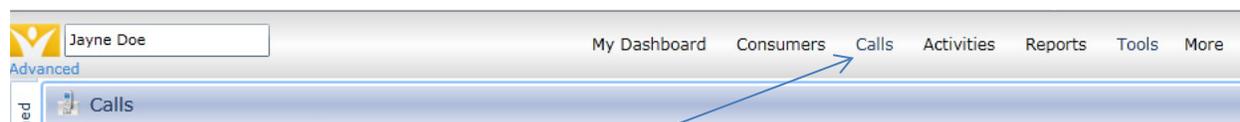
When a name is typed in this box, a list of possible matches will appear.



Once the consumer's name appears below the box, click on the correct consumer. There may be several names that appear. Only the consumer listed in the ADRC service area can be viewed and opened.

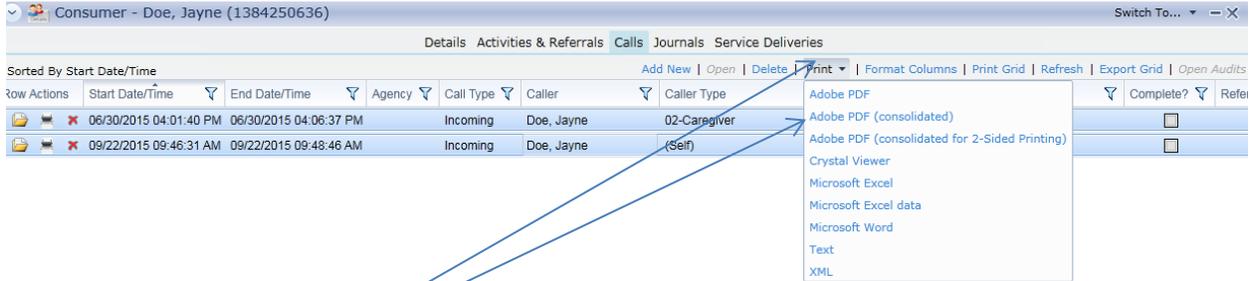


If necessary, an advanced search can be completed by clicking on the blue word **Advanced** below the box.



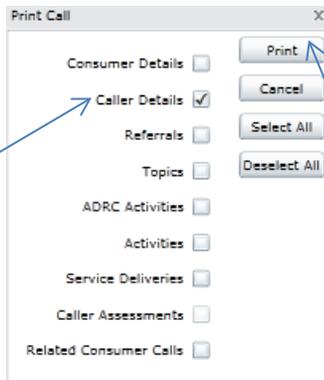
Next, select **Calls** to bring up all the calls and notes that have been entered on the consumer in the system. A list will be generated of all past calls with this consumer.

Hold down the Control key and click on all the calls to read at a glance. Holding down the Control key and clicking on a single cell will highlight the call line in blue. Notes that exist for each highlighted call line can be printed.



Next, go to **Print**. Click on the drop down arrow and select “Adobe PDF (consolidated).”

Select **Caller Details** and **Print**.



All the notes from the selected call lines can be previewed.

Call Summary

9/22/2015

Call Details

Call Type: Home visit Start Time: 7/9/2015 2:17:44PM End Time: 7/9/2015 2:22:38PM
 User: Lechner, Quasi Rhonda

Caller Details

(Anonymous) []

9/24 Rhonda called to ask if the meals have started. A follow up will be done within the week.
 10/1 Follow up was completed to see if additional services were needed at this time.....

The above action will generate a list of calls selected for the specific consumer. It will display the calls and notes beginning with the most recent. This helps ADRC staff to review the notes quickly when talking with the consumer.