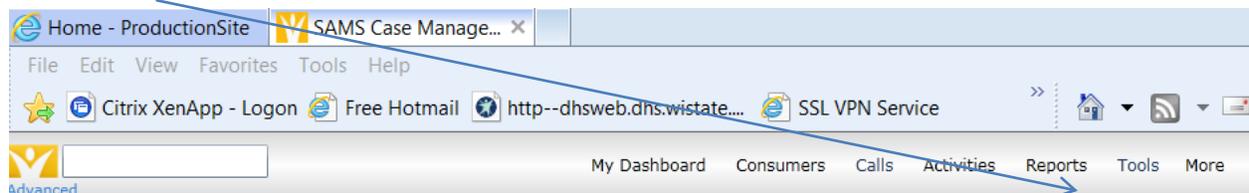


SAMS Call Topic Report

The Social Access Management System (SAMS) Call Topic is a more refined report that shows only the listing of call topics based on selected filters. This report is useful in gathering more specific information to evaluate topics and ensure resources and information are provided. The call topic report is different than the agency call report in that it can show more specific information on topics that ADRC staff discussed with customers during a specific time period. For instance, a report can be generated on the number of Minimum Data Set (MDS) Section Q reports that have been received in a given time period.

To go to the **Call Topic Report**, click on the “Reports” tab in the top bar.

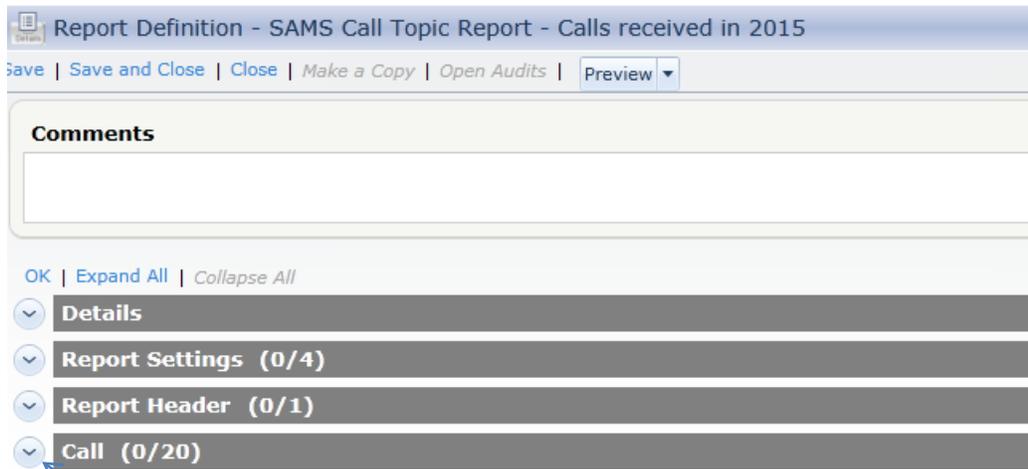


Select SAMS Call Topic Report.

| Reports | | | | |
|-----------------|----------------|--|--|--|
| Sorted By Title | | | | |
| Row Actions | Type | Title | Description | Comments |
| | Activities & R | Consumer Activity/Referral Mailing Labels | Avery 5160 labels generated based upon report of consumers associ | SAMS Report |
| | Activities & R | Consumer Activity/Referral Report | A report showing all consumer activities and referrals. | SAMS Report |
| | I & R Reports | Encounter Data: Error-Catcher | Check for Encounter call data errors | Displays a list of calls which are missing |
| | I & R Reports | Encounter Data: Generate XML Data | Generate XML data file for Encounter system | Preview using the Crystal Reports view |
| | I & R Reports | SAMS Agency Call Report | Summary Report of Calls for Agency | SAMS Report |
| | I & R Reports | SAMS Call Follow-up Report | A listing of Call Follow-ups based on selected filters | SAMS Report |
| | I & R Reports | SAMS Call Mailing Label Report | Avery 5160 Labels generated for callers or consumers of filtered calls | SAMS Report |
| | I & R Reports | SAMS Call Profiler Report | Summary Report of Call count for selected group | SAMS Report |
| | I & R Reports | SAMS Call Referral Report | Cross Tab summary of Call Referrals | SAMS Report |
| | I & R Reports | SAMS Call Summary Report | A listing of Calls based on selected filters | SAMS Report |
| | I & R Reports | SAMS Call Topic Report | A listing of Call Topics based on selected filters | SAMS Report |
| | I & R Reports | SAMS I & R Provider Report | A listing of I & R Providers based on selected filters | SAMS Report |
| | I & R Reports | SAMS I & R Provider Report with MA_ID filter | A listing of I & R Providers filtered by specified MA_ID | |
| | I & R Reports | SAMS Provider Directory Listing Report | Provider Directory Listing | SAMS Report |

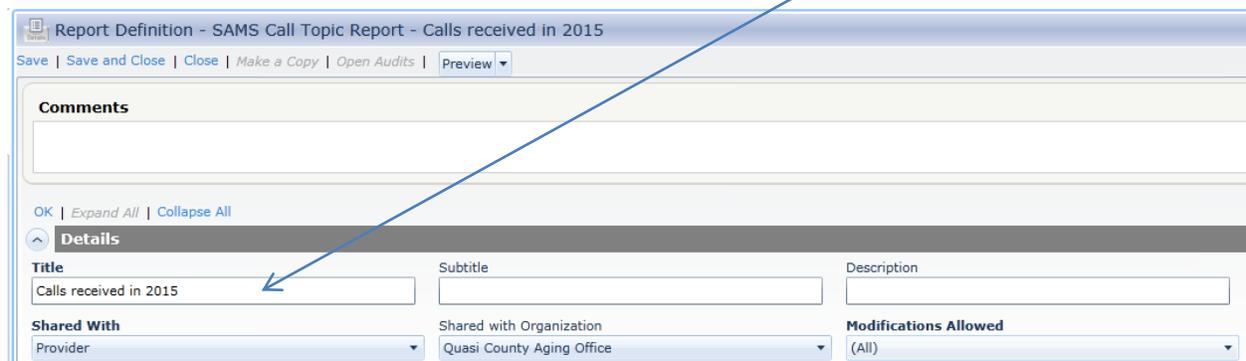
Open the definition of this report by double clicking on the link or by single clicking on the green cross on the left side of the report.

In the following report definition, there are four categories (Details, Report Settings, Report Header, and Call) in which selections can be specified in the report.



Expand each section of the above definition by clicking the down arrow to the left of each section.

Expand the **Details** section to provide a required title for this report. All other categories under Details can be left at the default settings.



Expand **Report Setting** and select “Yes” to print parameters. This shows the specific information contained in the report. All other categories in the report settings can be left on the default setting.



Comments can be recorded in the Report Header. Using comments in this header will create a subheading under the SAMS Call Topic Report heading. This is an optional field and the report can be run without comments being entered.

Report Header (1/1)

Report Comments

Call Topics in 2015

The **Call** category has a variety of settings to filter the calls. To see all calls, select the Start date (on or after) and Start Date (on or before). Do not use the end dates. Using start dates for the information will be more complete and accurate. All other settings can be left in the default settings.

Call (2/20)

| | | |
|---------------------------------------|--|--------------------------------------|
| Agency (Any) | Provider (Any) | Agent (Any) |
| Start Date (on or after) 1/1/2015 | Start Date (on or before) 9/30/2015 | End Date (on or after) Enter date |
| End Date (on or before) Enter date | Call Type (Any) | Caller Type (Any) |
| Age Group (Any) | Disability (Any) | Referred By (Any) |
| Call Priority (Any) | Complete (Y/N) (Any) | Topic (Any) |
| Activity (Any) | Follow (Any) | Referral (Any) |
| ADRC Activity (Any) | Topic Category (Any) | |

To see the MDS Q Referrals Received, select that topic category above. Click on the yellow file folder on the right to bring up topics for selection.

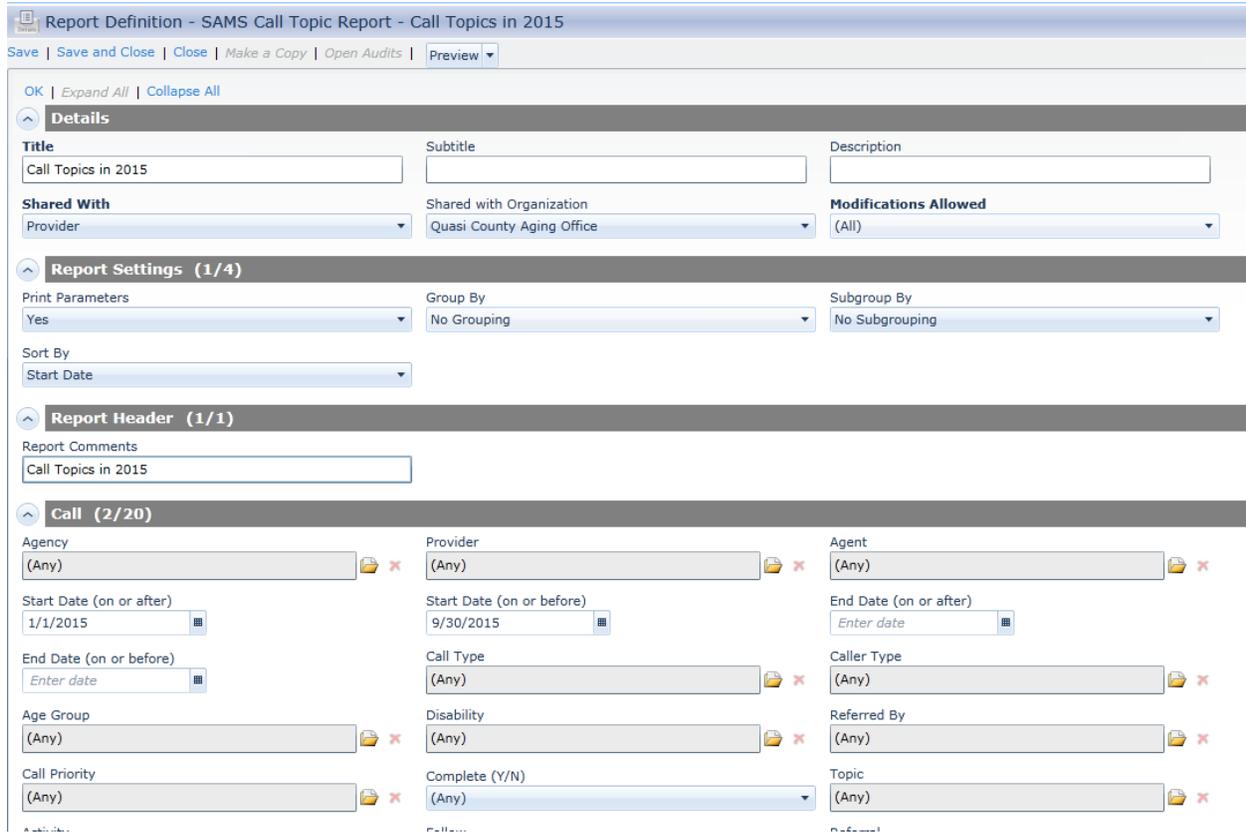
Select Topic

| | | |
|-------|---|--|
| (All) | <input type="checkbox"/> Description | <input type="checkbox"/> Selected items only <input type="checkbox"/> Hide inactive records |
| AB | <input type="checkbox"/> Low-income housing/Subsidized | |
| CD | <input type="checkbox"/> MA Transportation Complaints | |
| EF | <input type="checkbox"/> MA Transportation Complaints [Advocacy] | |
| GH | <input type="checkbox"/> MCO Complaints | |
| IJ | <input type="checkbox"/> MCO Complaints | |
| KL | <input checked="" type="checkbox"/> MDS Section Q Referral Received | |
| MN | <input type="checkbox"/> Medicaid | |
| OP | <input type="checkbox"/> Medical Transportation | |
| QR | <input type="checkbox"/> Medical Transportation | |
| | <input type="checkbox"/> Medical Transportation | |
| | <input type="checkbox"/> Medical Transportation | |

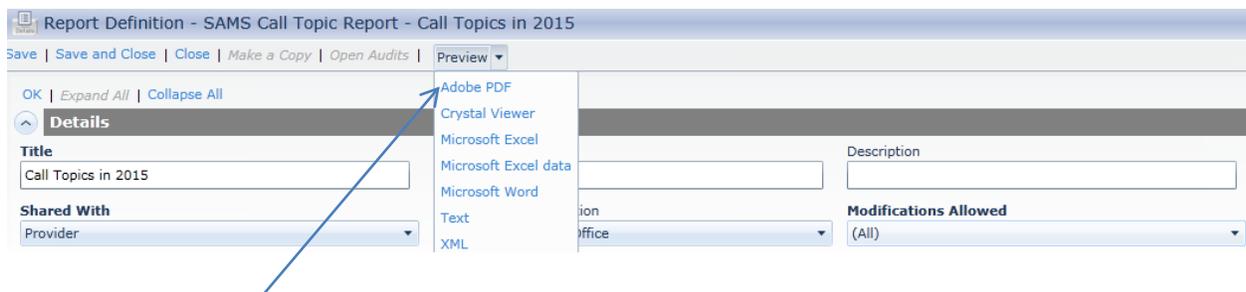
OK
Select All
Deselect All
Cancel

A variety of topics can be specified. To see all topics, leave the default setting of **Any** in the field, or narrow the topics with specific selections. Clicking “OK” will create a report that will only bring up the MDS Section Q Referral Received (shown at the end of this document.)

Finally, the full definition is shown below:



In order to generate a report from this information, select the preview button and select a program to view the information.



Note: The data contained in the above examples and the following report has been taken from a user testing environment.

Below are parameters of the example report created.

- Call Topics in 2015

Report Comments:

Call Topics in 2015

Parameters List:

Report:

Print Parameters: Yes
Group By: No Grouping
Subgroup By: No Subgrouping
Sort By: Start Date

Call:

Agency: (Any)
Provider: (Any)
Agent: (Any)
Call Start Date (on or after): 1/1/2015
Call Start Date (on or before): 9/30/2015
Call End Date (on or after):
Call End Date (on or before):
Call Type: (Any)
Caller Type: (Any)
Age Group: (Any)
Disability Type: (Any)
Referred By: (Any)
Call Priority: (Any)
Complete: (Any)
Topic Category: (Any)
Topic: (Any)
Activity: (Any)
Followup Status: (Any)
Referral: (Any)
ADRC Activity: (Any)

Restricted View:

Match Option: (All)

The following is short list of the data generated from the above report definition/parameters:

SAMS Call Topic Report

9/17/2015

- Call Topics in 2015

| Call Details | | Topic Details | |
|--------------|----------------------|------------------|---|
| Call Date: | 7/10/2015 11:02:28AM | Consumer County: | Topic: Accessible Housing [Unmet Needs] |
| Consumer: | JOnes, Jerry | Consumer Town: | Outcome: Referral information provided |
| Caller: | (Anonymous) | Consumer Zip: | Time Spent: |
| Agent: | quasijanet | | Topic Notes: |
| Call Date: | 7/9/2015 3:06:54PM | Consumer County: | Dane |
| Consumer: | Doe, Jayne | Consumer Town: | Madison |
| Caller: | Doe, John | Consumer Zip: | 53701 |
| Agent: | quasirhonda | | Topic: Medicaid |
| Call Date: | 7/9/2015 3:06:54PM | Consumer County: | Dane |
| Consumer: | Doe, Jayne | Consumer Town: | Madison |
| Caller: | Doe, John | Consumer Zip: | 53701 |
| Agent: | quasirhonda | | Topic: Budget Counseling |
| Call Date: | 7/9/2015 3:06:54PM | Consumer County: | Dane |
| Consumer: | Doe, Jayne | Consumer Town: | Madison |
| Caller: | Doe, John | Consumer Zip: | 53701 |
| Agent: | quasirhonda | | Topic: Accessible Housing |
| Call Date: | 8/25/2015 11:14:29AM | Consumer County: | Out of State |
| Consumer: | Doe, John | Consumer Town: | Out of State |
| Caller: | Doe, Jayne | Consumer Zip: | 99999-0004 |
| Agent: | quasirhonda | | Topic: Advanced Directives |
| Call Date: | 8/25/2015 11:14:29AM | Consumer County: | Out of State |
| Consumer: | Doe, John | Consumer Town: | Out of State |
| Caller: | Doe, Jayne | Consumer Zip: | 99999-0004 |
| Agent: | quasirhonda | | Topic: Low-Income Energy Assistance |
| Call Date: | 8/25/2015 11:14:29AM | Consumer County: | Out of State |
| Consumer: | Doe, John | Consumer Town: | Out of State |
| Caller: | Doe, Jayne | Consumer Zip: | 99999-0004 |
| Agent: | quasirhonda | | Topic: Estate Planning |
| Call Date: | 9/15/2015 11:21:36AM | Consumer County: | Quasi |
| Consumer: | Vizsla, Dvna | Consumer Town: | Yooohoo Test City |
| | | | Topic: Camps |
| | | | Outcome: |

This is an example of a call topic report when “MDS Section Q Referral Received” is only selected in the topic field/section for Call definition.

SAMS Call Topic Report

10/6/2015

- MDS Q

| Call Details | | Topic Details | |
|---|---------------------|------------------|--|
| Topic: MDS Section Q Referral Received | | | |
| Call Date: | 10/6/2015 8:37:41AM | Consumer County: | Quasi |
| Consumer: | Doe, Rhonda | Consumer Town: | Quasi City |
| Caller: | Doe, Rhonda | Consumer Zip: | 70124 |
| Agent: | quasirhonda | | Topic: MDS Section Q Referral Received |
| | | | Outcome: |
| | | | Time Spent: |
| | | | Topic Notes: |

Total number of calls for 'MDS Section Q Referral Received': 1

| | |
|-------------------------------------|---|
| Total number of topics: | 1 |
| Total number of unduplicated calls: | 1 |
| Total number of call topics: | 1 |