

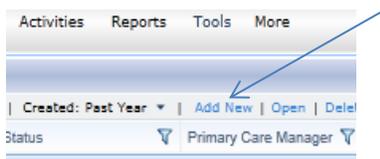
How to enter a call to Generate Follow Up Reports in SAMS IR

ADRC staff will need to use the activity reporting tab in Social Assistance Management System Information and Referral (SAM IR) to track their follow up activities before a Follow Up report can be generated. This report shows if ADRC staff have upcoming follow ups that are due within a week, a month, or within any time frame chosen. If an ADRC staff is out of the office unexpectedly, a supervisor or other designated staff would be able to access the SAMS system and run a report to determine if follow ups are due. See the SAMS3 User Guide for more specific information.

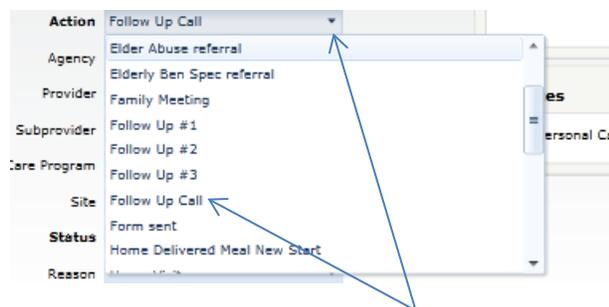
Below is an example of information typically selected by an ADRC staff under activities once a consumer call record is open.



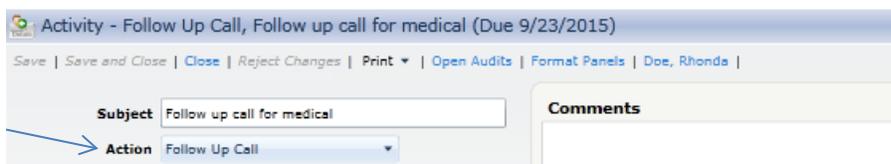
It is necessary to select the “Add New” tab in order to add activities to the specific record.



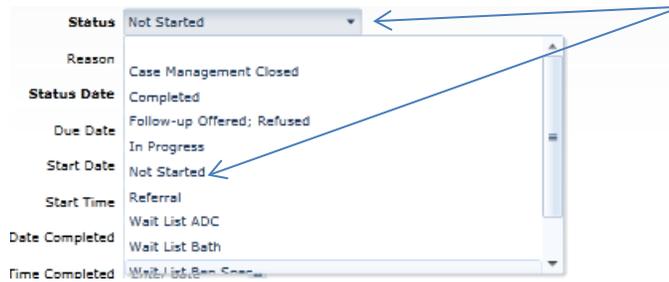
Initially, “Follow Up Call” will be selected in **Action**:



When clicking on the down arrow, the option for “Follow Up Call” is available to select.



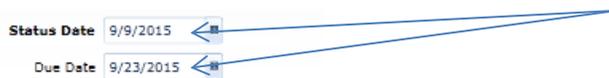
Status must be selected as “Not Started.”



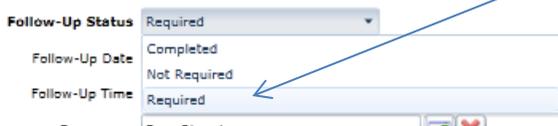
It will look like this once a selection is made:



The **status date** will auto fill with the current date, but the **due date** must be entered as seen below:



The **Follow-Up Status** must be selected as “Required.”

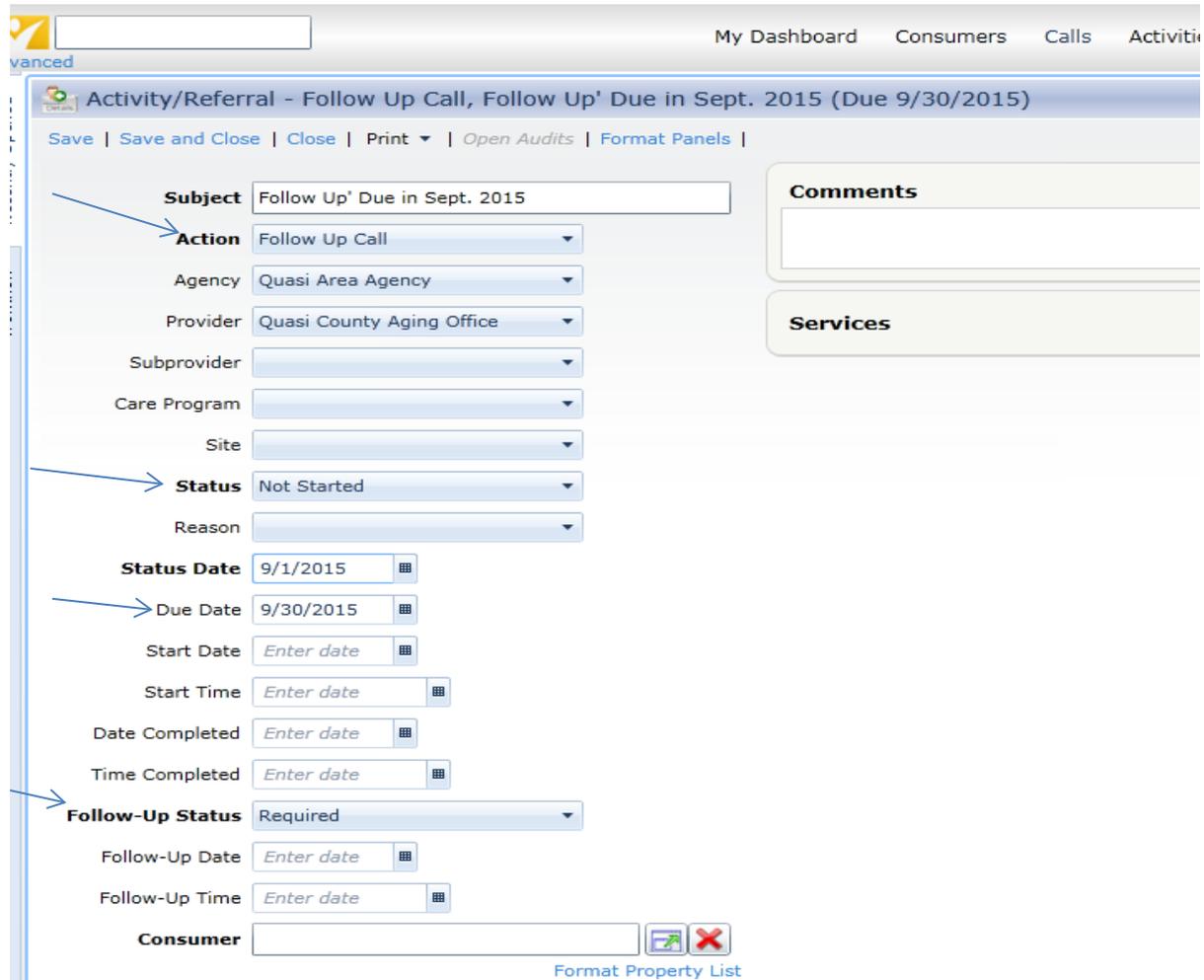


It should look like this once the selection is made:



Once the follow up is complete, the ADRC staff can select “Completed in the above section” so the specific call will not show up in a report on required follow ups.

Below is how the full Activity/Referral section will look once all the sections are completed:



My Dashboard Consumers Calls Activities

Activity/Referral - Follow Up Call, Follow Up' Due in Sept. 2015 (Due 9/30/2015)

Save | Save and Close | Close | Print | Open Audits | Format Panels |

Subject Follow Up' Due in Sept. 2015

Action Follow Up Call

Agency Quasi Area Agency

Provider Quasi County Aging Office

Subprovider

Care Program

Site

Status Not Started

Reason

Status Date 9/1/2015

Due Date 9/30/2015

Start Date Enter date

Start Time Enter date

Date Completed Enter date

Time Completed Enter date

Follow-Up Status Required

Follow-Up Date Enter date

Follow-Up Time Enter date

Consumer

Comments

Services

Format Property List

Upon completion of the selections above, save the entries by selecting “Save” in the top row of the Activity/Referral.



My Dashboard Consumers Calls Activities

Activity/Referral -

Save | Save and Close | Close | Print | Open Audits | Format Panels |

Subject

Comments

Ultimately, the selected items must also be selected in the report definition for the “Consumer Activity/Referral Report” to generate a list of follow ups that are due.