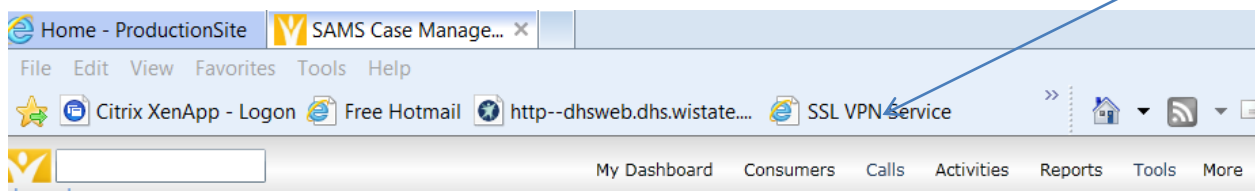


SAMS Consumer Activity/Referral Report

This report can be used for capturing information on follow-ups, referrals made by the ADRC staff, and other ADRC activities. This report can be used to see what referrals are being made most often or if follow-ups were due and not completed. For this particular document, the focus will be on obtaining a follow-up report. If activities or referrals are not provided in call records, a report cannot be run using the Consumer Activity/Referral Report. A separate document has been created to show how to enter activities so a report on follow-up can be run using the Consumer Activity/Referral Report.

To access this report, go to the Reports tab in the top bar of SAMS and click **Reports**.

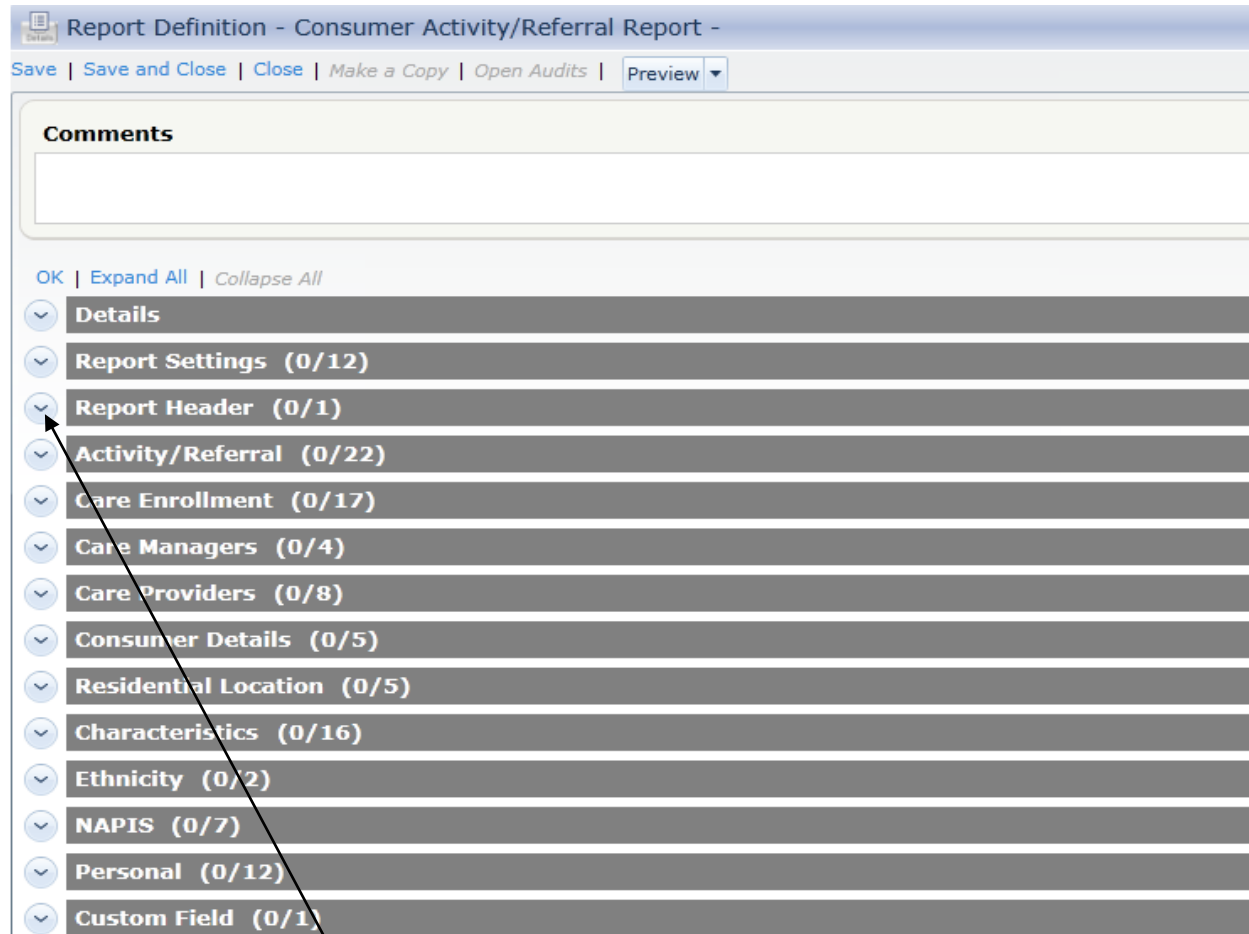


Select the Consumer Activity/Referral Report.

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 dis
	I & R Reports	Encounter Data: Generate XML Data	Generate XML data file for Encounter system	Preview using the Crystal Reports viewer. T
	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

Click the green plus sign on the left side or double left click on the report line to open a report definition for this report.

Below is the report definition, along with a variety of criteria that can be selected to run a specific report, relating to consumer activities and/or referrals that have been listed in agency call records.



Report Definition - Consumer Activity/Referral Report -

Save | Save and Close | Close | Make a Copy | Open Audits | Preview ▾

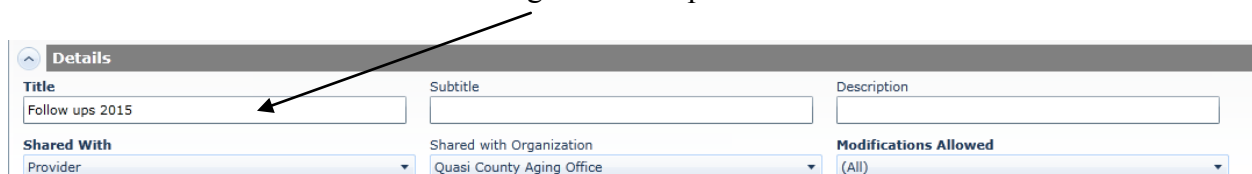
Comments

OK | Expand All | Collapse All

- Details
- Report Settings (0/12)
- Report Header (0/1)
- Activity/Referral (0/22)
- Care Enrollment (0/17)
- Care Managers (0/4)
- Care Providers (0/8)
- Consumer Details (0/5)
- Residential Location (0/5)
- Characteristics (0/16)
- Ethnicity (0/2)
- NAPIS (0/7)
- Personal (0/12)
- Custom Field (0/1)

Click any of the down arrows to expand the definition areas to input selections.

A title must be entered in the **Details** section in order to run the report. It is best practice to have the ADRC name listed, then a title. This will make it easier to access after it is saved. The other fields can be left with their default settings for this report.



Details

Title Follow ups 2015	Subtitle 	Description
Shared With Provider	Shared with Organization Quasi County Aging Office	Modifications Allowed (All)

Some parameters/selections may limit the information generated in the report. Other parameters may contain too much information, which could impact the amount of time the system takes to generate a report.

Next, select **Report Settings** and **Print Parameters** sections. It is best practice to select **Yes** or **Selected Only** for Print Parameters. This will allow the report to print with the selections indicated. All other settings in this part of the definition are left in their default state.

Report Settings (1/12)

Choose Columns for Consumer (Any)	Choose Columns for Group (Any)	Print Parameters Yes
Group By No Grouping	Group per Page No	Sort By Client ID
Secondary Sort By Client ID	Show Activity/Referral Details Yes	Show Activity/Referral Comments Yes
Print Consumer Details Yes	Include Consumer Groups Yes	Activity/Referral Layout Format Standard

Print Parameters

Yes
No
Yes
Selected Only

Clicking on the down arrow will open the box.

To add a subtitle to the report, use the **Report Header** and write in the Report Comments box. This is optional as the report will run without any comments in this section.

Report Header (1/1)

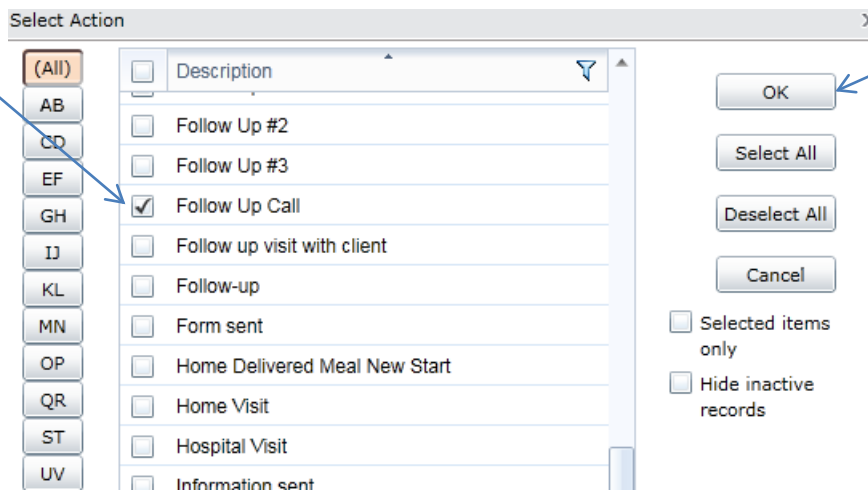
Report Comments
9-2015 Follow-ups

In the **Activity/Referral** section, fill in the action. Click the yellow folder next to the action box.

Activity/Referral (1/22)

Action
Follow Up Call

A list of several activities can be selected. For this example, **Follow Up Call** was selected, then **OK**, and the action box auto fills with this activity.



Select Action

(All)

AB

CD

EF

GH

IJ

KL

MN

OP

QR

ST

UV

☐ Description

☐ Follow Up #2

☐ Follow Up #3

☒ Follow Up Call

☐ Follow up visit with client

☐ Follow-up

☐ Form sent

☐ Home Delivered Meal New Start

☐ Home Visit

☐ Hospital Visit

☐ Information sent

OK

Select All

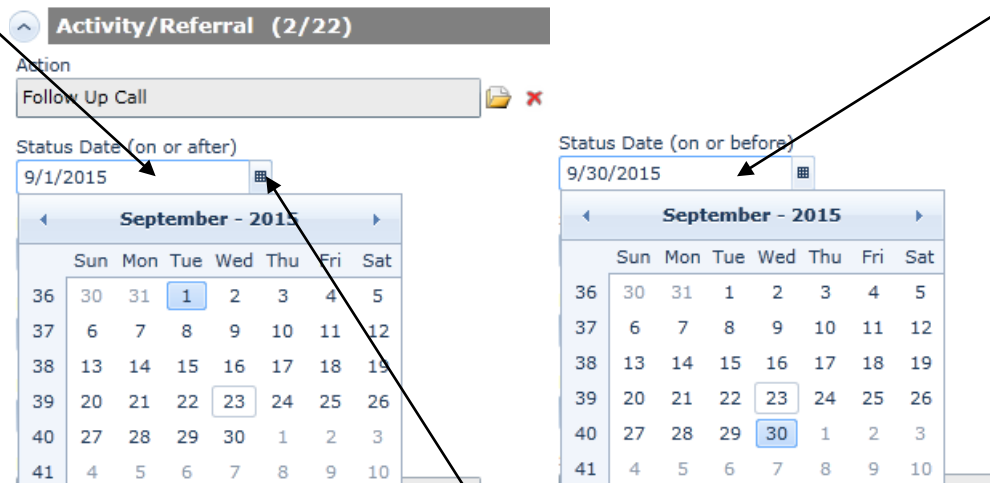
Deselect All

Cancel

☐ Selected items only

☐ Hide inactive records

Next, the status dates related to the follow up will need to be completed. For September 2015, the Status Date (on or after) of 9/1/2015 was selected and the Status Date (on or before) of 9/30/2015 was selected.



Activity/Referral (2/22)

Action

Follow Up Call

Status Date (on or after)

9/1/2015

Status Date (on or before)

9/30/2015

September - 2015

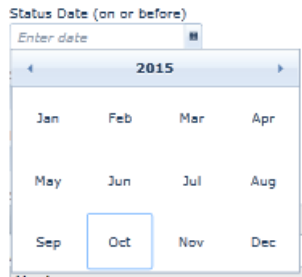
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
36	30	31	1	2	3	4	5
37	6	7	8	9	10	11	12
38	13	14	15	16	17	18	19
39	20	21	22	23	24	25	26
40	27	28	29	30	1	2	3
41	4	5	6	7	8	9	10

September - 2015

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
36	30	31	1	2	3	4	5
37	6	7	8	9	10	11	12
38	13	14	15	16	17	18	19
39	20	21	22	23	24	25	26
40	27	28	29	30	1	2	3
41	4	5	6	7	8	9	10

Click the small box next to the date box. A small calendar will appear. Click a specific date. The date will automatically appear in the box.

Clicking the month heading will show all the months of the year to choose from.



Select the month at the top of the calendar and all 12 months will appear.

All other information can be left in its default setting for this report. See the example below:

Activity/Referral (3/22)

Action Follow Up Call	Status (Any)	Reason (Any)
Status Date (on or after) 9/1/2015	Status Date (on or before) 9/30/2015	Due Date (on or after) Enter date
Due Date (on or before) Enter date	Start Date (on or after) Enter date	Start Date (on or before) Enter date
Date Completed (on or after) Enter date	Date Completed (on or before) Enter date	Followup Status (Any)
Followup Date (on or after) Enter date	Followup Date (on or before) Enter date	Agency (Any)
Provider (Any)	Service (Any)	Provider Role (Any)
Subprovider (Any)	Action Level of Care (Any)	Action Service Program (Any)
Action Care Program (Any)		

Below is the complete definition to review all the follow-ups that are due in the month of September 2015.

Report Definition - Consumer Activity/Referral Report - September Follow-ups 2015

Save | Save and Close | Close | Make a Copy | Open Audits | Preview

Title September Follow-ups 2015	Subtitle	Description
Shared With Provider	Shared with Organization Quasi County Aging Office	Modifications Allowed (All)

Report Settings (1/12)

Choose Columns for Consumer (Any)	Choose Columns for Group (Any)	Print Parameters Yes
Group By No Grouping	Group per Page No	Sort By Client ID
Secondary Sort By Client ID	Show Activity/Referral Details Yes	Show Activity/Referral Comments Yes
Print Consumer Details Yes	Include Consumer Groups Yes	Activity/Referral Layout Format Standard

Report Header (1/1)

Report Comments
9-2015 Follow-ups

Activity/Referral (3/22)

Action Follow Up Call	Status (Any)	Reason (Any)
Status Date (on or after) 9/1/2015	Status Date (on or before) 9/30/2015	Due Date (on or after) Enter date
Due Date (on or before) Enter date	Start Date (on or after) Enter date	Start Date (on or before) Enter date
Date Completed (on or after) Enter date	Date Completed (on or before) Enter date	Followup Status (Any)

To generate the report, go to the **Preview** button and select the program to view the report. For this report, Adobe PDF was selected.

Report Definition - Consumer Activity/Referral Report - September F

Save | Save and Close | Close | Make a Copy | Open Audits | Preview

Adobe PDF
Crystal Viewer
Microsoft Excel
Microsoft Excel data
Microsoft Word
Text
XML

Below is an example of a report definition with the selections identified for each category.

Report Definition - Consumer Activity/Referral Report - 9-2015 f/u's

Save | Save and Close | Close | Reject Changes | Make a Copy | Open Audits | Preview

Comments

Open Report Definition

Title	9-2015 f/u's
Subtitle	9-2015 f/u's
Shared With	Provider
Shared with Organization	Quasi County Aging Office
Modifications Allowed	(All)

Report Settings

Print Parameters	Yes
Group By	No Grouping
Group per Page	No
Sort By	Client ID
Secondary Sort By	Client ID
Show Activity/Referral Details	Yes
Show Activity/Referral Comments	Yes
Print Consumer Details	Yes
Include Consumer Groups	Yes
Activity/Referral Layout Format	Standard

Report Header

Report Comments	September 2015 f/u's
-----------------	----------------------

Activity/Referral

Action	Follow Up Call
Status	Not Started
Status Date (on or after)	09/01/2015
Due Date (on or before)	09/30/2015

Care Managers

Filter To Active Only	No
Filter Primary Only	No

Note that the data used in the above examples and the following reports has been taken from a user-testing environment.

Below is a printed example of this report type using the specific information that was selected for the parameters.

Consumer Activity/Referral Report

10/08/2015

- 9-2015 f/u's

9-2015 f/u's

Report Comments:

September 2015 f/u's

Parameters List:

Report:

Choose Columns for Client: Client ID, County of Residence, DOB, Full Name, Gender, Primary Care Manager, Primary Phone, Residential Address, Town of Residence, Zip Code of Residence

Choose Columns for Group: (All)

Print Parameters: Yes

Group By: No Grouping

Group per Page: No

Sort By: Client ID

Secondary Sort By: Client ID

Show Activity/Referral Details: Yes

Show Activity/Referral Comments: Yes

Print Consumer Details: Yes

Include Consumer Groups: Yes

Activity/Referral Layout Format: Standard

Activities/Referral

Action: Follow Up Call

Status: Not Started

Reason: (Any)

Status Date (on or after): 9/1/2015

Status Date (on or before):

Due Date (on or after):

Due Date (on or before): 9/30/2015

Start Date (on or after): 1/1/1800

Start Date (on or before):

Date Completed (on or after):

Date Completed (on or before):

Followup Status: (Any)

Followup Date (on or after):

Followup Date (on or before):

Agency: (Any)

Consumer Activity/Referral Report

10/08/2015

- 9-2015 f/u's

9-2015 f/u's

Client ID	Full Name	Gender	DOB	Primary Phone	Residential Address	County
■ 1333254104	Doe, Rhonda	F	09/09/1973	(999) 296-4444	75 East West St. Quasi City, WI 70124	Quasi

Subject: Follow up call for medical	Action: Follow Up Call	Status: Not Started	Status Date: 9/9/2015
Agency: Quasi Area Agency	Provider: Quasi County Aging Office	Due Date: 9/23/2015	
Care Program:	Subprovider: Quasi County Service Subprovider		
Reason:	Start: n/a Completed: n/a Time Spent: n/a		
Originated By: Quasi County Aging Office	Creator: Quasi Rhonda Lechner	Followup: Required	On: n/a

Total Action Count: 1 Total Time Spent: 0

Total:	1 unduplicated consumer
Grand Total:	1 unduplicated consumer
Summary:	1 consumer; 0 consumer group.