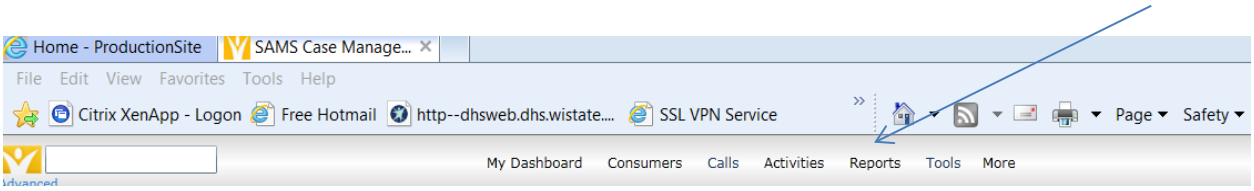
SAMS Agency Call Report

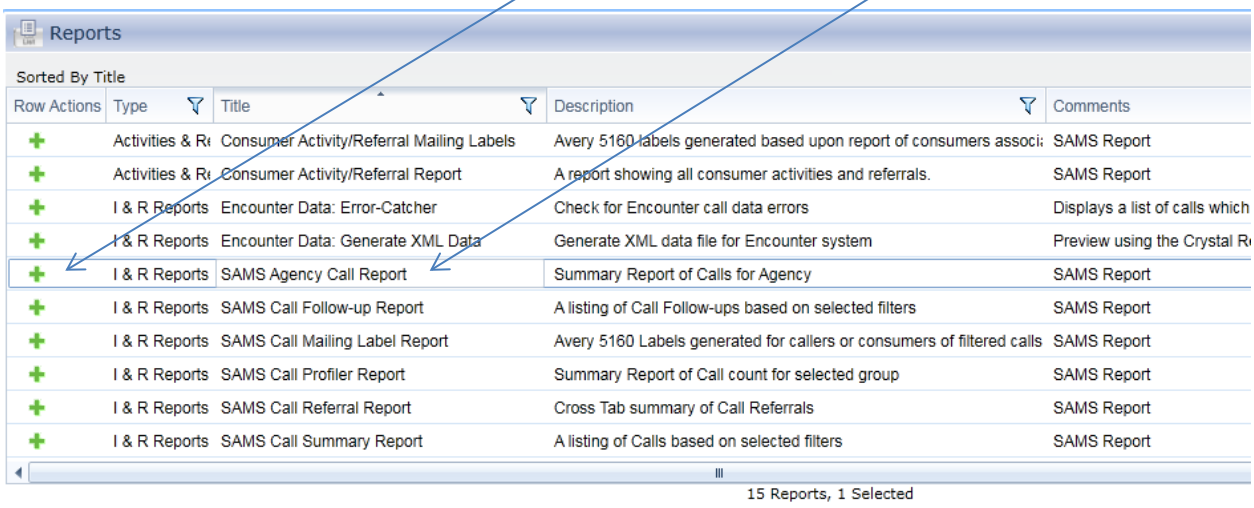
SAMS Agency Call Reports are used to identify information about who is calling the ADRC, what topics are being discussed, and what the outcomes are (shown as ADRC activity) of the calls. These reports are useful for governing board reporting, agency reporting, evaluating who the ADRC customers are, what their needs may be, and how many interactions ADRC staff are having.

- This report will include a total number of calls in the specific time period selected, topics discussed during calls, the ADRC activities (ADRC outcomes reported in the call), consumer age group, who referred the caller, and the consumer's disability.
- When this report is run, ADRC staff workload can be viewed by selecting a specific agent. This may be helpful in any performance reviews as well as workload management.
- With this report, comparisons can be made in the ADRC region by selecting specific agents from a specific site.

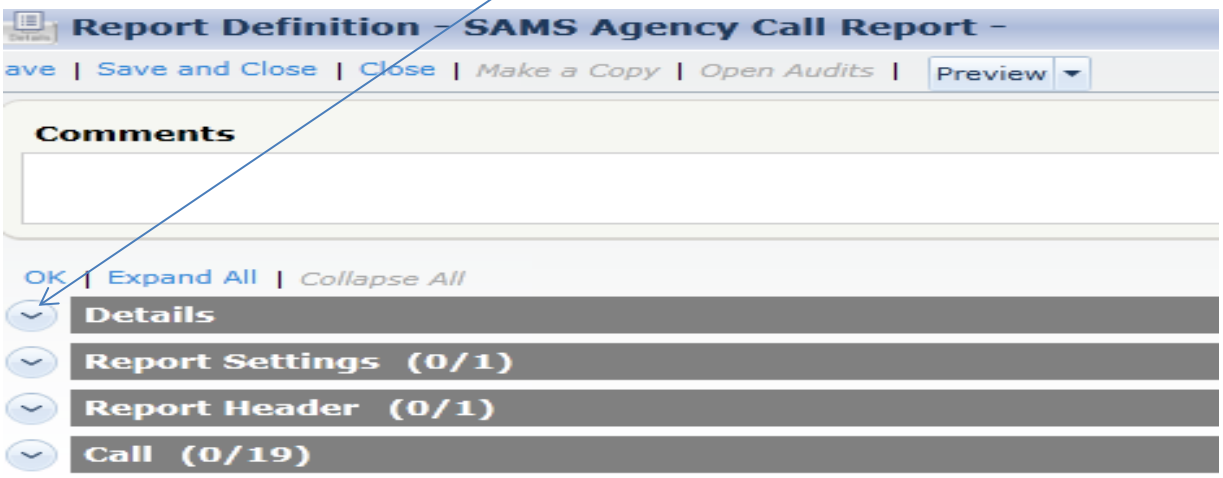
To access this report, go to the Reports tab in the top bar of SAMS and click on **Reports**.



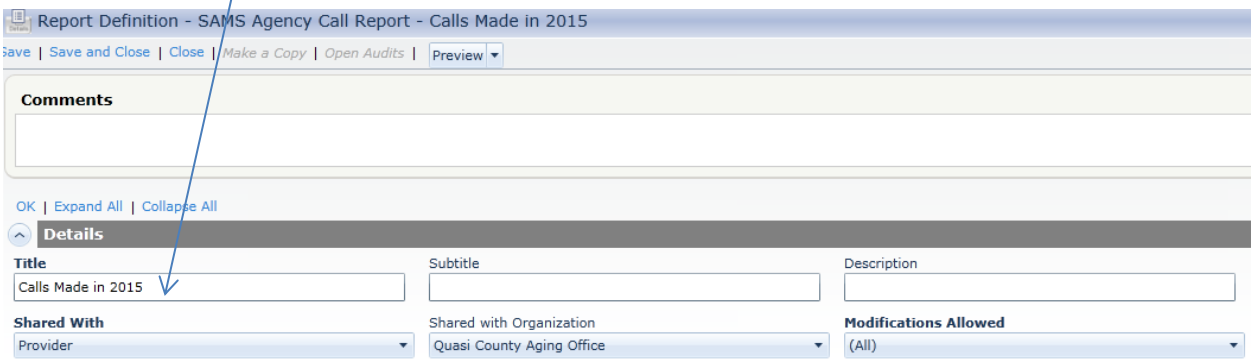
Double click on **SAMS Agency Call Report**. Another way to open this report is to single click the green plus sign on the left.



Below is a screen showing the SAMS Agency Call Report Definition with the details, report settings, report header, and call selections that can be used to generate a report. Click the down arrow on the left to expand details and other settings to make selections.

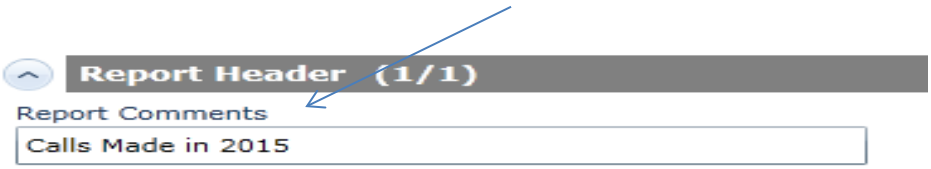


A title must be specified for the report. It is best practice to have the ADRC name listed, then a title. In order to do this function, expand the **Details** and add a Title. Also in this section, the defaults will typically be shown in Shared With Provider and Shared with Organization Your Agency, and Modifications Allowed "all." It is optional to add a subtitle or descriptions.

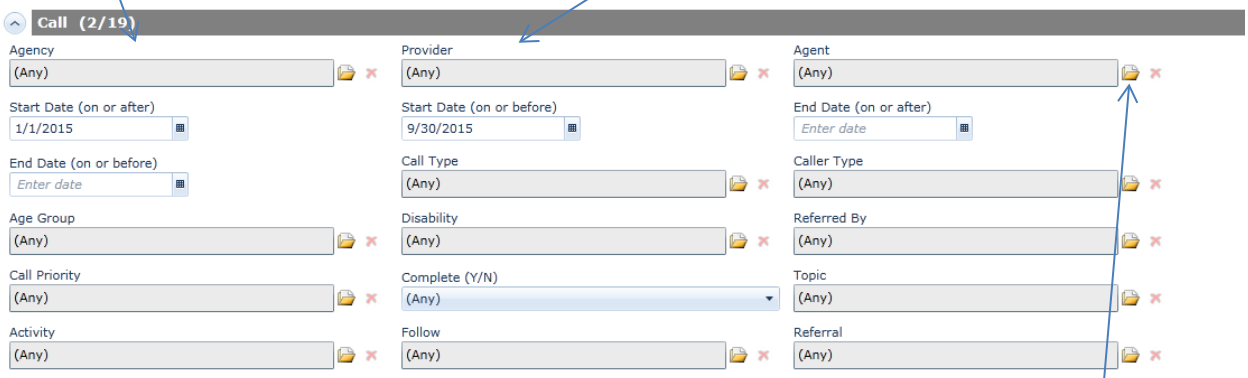


In the **Report Settings**, print the parameters to view what information was requested for the report. Select Yes, No, or Selected Only. The **selected only** option gives the specifics of what was chosen in the definition.

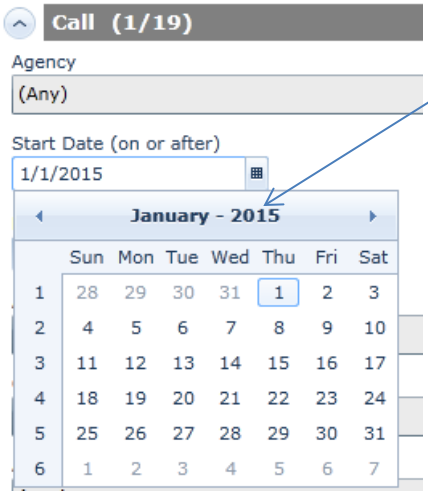
The following **Report Header** will provide a subheading that will be listed under the SAMS Agency Call Report Heading in the report. This is an optional field.



Below are selections that can be made in the **Call** fields to further define the report. The only changes made in this definition are the start dates. For the first nine months of 2015, the start date (on or after) 1/1/2015 was selected and the start date (on or before) 9/30/2015 was selected. Do not use the end dates as these will create an inaccurate report. The other fields were left in their default settings.

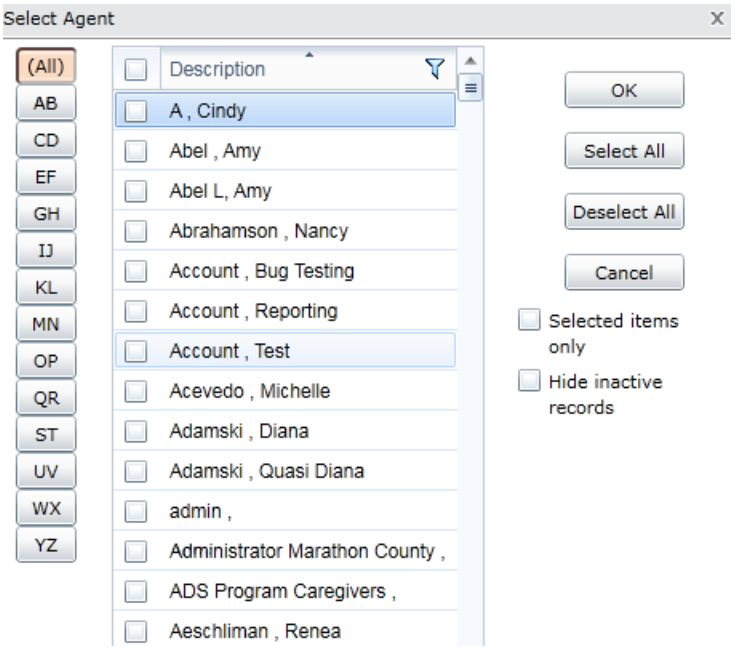


Click the box to the right of the date. A calendar will pop up allowing a date to be selected.



To run a report for a specific ADRC staff person, open the folder by **agent** and select the person from the list. Select any staff associated with your ADRC. If the agent is selected as **Any**, all

staff associated with the ADRC will be selected. To view calls for a specific site, select agents/staff from that particular site.



Note staff associated with the ADRC will appear in a report. SAMS users who work for a different ADRC will not show up in the report.

Below is the full definition of the report with all of the above selections.

Report Definition - SAMS Agency Call Report - Calls Made in 2015

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

OK | Expand All | Collapse All

Details

Title: Calls Made in 2015

Subtitle:

Description:

Shared With: Provider

Shared with Organization: Quasi County Aging Office

Modifications Allowed: (All)

Report Settings (1/1)

Print Parameters: Selected Only

Report Header (1/1)

Report Comments: Calls Made in 2015

Call (2/19)

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)

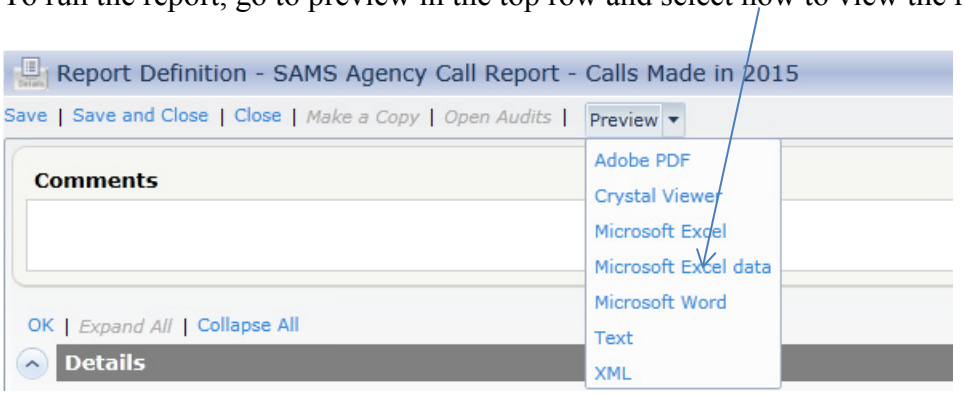
Topic: (Any)

Activity: (Any)

Follow: (Any)

Referral: (Any)

To run the report, go to preview in the top row and select how to view the report.



Below is the actual report that was generated from the above report definition, starting with the parameters. Note that the data contained in this document has been taken from a user testing environment.

SAMS Agency Call Report

Calls Made in 2015

Report Comments:

Calls Made in 2015

Parameters List:

Report:

Print Parameters: Selected Only

Call:

Call Start Date (on or after): 1/1/2015

Call Start Date (on or before): 9/30/2015

Restricted View:

Match Option: (All)

Provider: Quasi County Aging Office

SAMS Agency Call Report

9/9/2015

- Calls Made in 2015

Call Priority:

No. of Calls	Call Priority
5	Urgent: Needs assistance/action within approx. 48 hours
5	**Total**

Who made contact (Caller Type):

No. of Calls	Caller Type
13	(Self)
7	02-Caregiver
1	03-Relative/Guardian/Friend/Neighbor/Community member
1	05-ADRC Contacted Consumer or Designee
22	**Total**

Topic Categories discussed during call:

No. of Calls	Topic Category
1	Financial Assistance
1	Food
1	Housing
1	Legal Services
2	Public Benefits
1	Unmet Needs
4	**Total**

ADRC Activity:

No. of Calls	ADRC Activity
4	01-Provided Information & Assistance
2	02-Provided options counseling
3	03-Provided follow-up
1	05-Referred to economic support
1	06-Provided assistance with Medicaid application process
1	07-Referred for financial-related needs other than economic support
1	11-Provided enrollment consultation
7	**Total**

Consumer Age Group:

No. of Calls	Consumer Age Group
5	18 - 59
10	60 - 150
15	**Total**

Referred By:

No. of Calls	Referred By
1	Assisted Living
1	Economic Support
2	Friend/Family
2	Home Health Agency
1	Hospital
7	**Total**

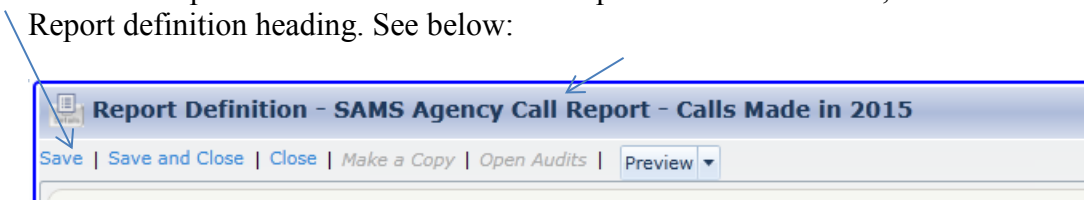
Disability:

No. of Calls	Disability
1	01-Developmental Disability
6	02-Elderly
3	03-Mental Health
7	04-Physical Disability
10	**Total**

Monthly Total

No. of Calls	Total Minutes	Month
2	2	February, 2015
1	13	May, 2015
4	135	June, 2015
8	66	July, 2015
5	46	August, 2015
2	18	September, 2015
22	**280**	**Total**

To save the generated report, save the report definition by going to the top row and clicking **Save**. The report will be saved with the title provided in the details, which is also viewed in the Report definition heading. See below:



To locate a saved report, go to **Reports**, single click on the type of report being located. This will open another box below that will state **Report Definitions**. The saved report can be found here. Note that agencies that used their ADRC name first may be able to find their specific reports quicker.

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 d
+	I & R Reports	Encounter Data: Generate XML Data	Generate XML data file for Encounter system	Preview using the Crystal Reports viewer.
+	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
+	I & R Reports	SAMS SART Report	Summary Report of ADRC data	SAMS Report

15 Reports, 1 Selected

Click to hide report definitions

Report Definitions

Sorted By Title

Row Actions	Title	Description	Shared With	Create User	Last Update User	Last Updated	Comments
	2 - Q1 2011	First quarter 20	Provider	Test Account	Test Account	4/8/2011 4:59:12 PM	
	3 - Q2 2011	Second quarter	Provider	Test Account	Test Account	4/8/2011 5:27:43 PM	
	4 - Test reset	Full year	Provider	Test Account	Test Account	4/8/2011 5:56:02 PM	Here be comme
	ADRC Contacts of GLMW		(All)	Fran Geier	Julie Johannes	7/22/2015 1:38:46 PM	
	ADRC of the Northwoods - EOY Repo		(All)	Carrie Kroetz	Carrie Kroetz	2/26/2015 9:15:13 AM	Change the Sta

Additional tips for running these reports

- Parameters with short time periods or a narrow focus will run quicker, for instance reporting on one month vs. an entire year.
- Be sure to print parameters to view exactly what the report should contain.
- In the parameters, never use an end date. Always use **start date (on or after)** and **start date (on or before)**. For instance, when generating a report for calls made in 2015, choose start date (on or after) 1/1/2015 and start date (on or before) 9/30/2015.
- ADRCs will be able to see all the agents (ADRC staff) and ADRC reports in the system, but will only be able to open and view reports of their specific ADRC agents.
- When saving a report, use the ADRC name first, then the name of the report. This helps to find reports associated with the ADRC more quickly.