**Division of Public Health – Bureau of Aging and Disability Resources**

# WellSky/SAMS

## *Data Entry Guide*

### Aging and Disability Resource Centers
### Tribal Aging and Disability Resource Specialists
### Dementia Care Specialists

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# WellSky/SAMS Data Entry Guide

Aging and Disability Resource Centers
Tribal Aging and Disability Resource Specialists
Dementia Care Specialists

# Contents

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## Introduction

The WellSky Aging & Disability database application (WellSky/SAMS) is the primary client tracking system that is used to track activities that occur between or on behalf of a customer at aging and disability resource centers (ADRC) and tribes throughout Wisconsin. This document provides instructions for the following staff who may enter client tracking information in WellSky/SAMS:

- ADRC specialists.
- Tribal aging and disability resource specialists (tribal ADRS). and their supervisors,
- Dementia care specialists (DCS).
- Other ADRC staff including supervisors, receptionists, resource database staff, and outreach staff.

Generally, all references within this document "agency" or "staff" should be interpreted to apply to all of the above staff types.

Benefit specialists utilize a separate set of WellSky/SAMS guides.

For searching and data collection purposes, WellSky/SAMS refers to all persons as **Consumers** or **Callers**, including customers, legal decision makers, caregivers, and other interested parties.

## Account Access

Access to WellSky/SAMS is restricted to account holders authorized by the Wisconsin Department of Health Services (DHS). Though a single system is used statewide, **users may only access data entered by staff within their local agency**. If there are multiple users at the same local agency with the same access permissions, those users will be able to view each other's data entry and modifications. Please note that all data you enter and modify will be visible to all other authorized users with the same data access permissions as yours.

## Notes about the Data Entry Guide

This guide is designed to provide users with the basic tools to enter data, modify records, and track and manage their customer contacts within WellSky/SAMS. Because WellSky/SAMS is widely used in governmental health departments and agencies throughout the country, many options and features exist that are not applicable for use by agencies in Wisconsin. This guide demonstrates targeted data entry actions, eliminating the capture of unnecessary and irrelevant data and focusing on uses that are relevant to agency staff. Your ADRC or tribe might request additional information be captured than what is described within this guide.

Within this guide you will find hyperlinks from the table of contents to key sections of the document as well as additional hyperlinks within the document itself.

## Learning Objectives

- Learn how to create and edit a *Call Record*.
- Learn how to create and edit a *Consumer Record*.
- Learn how to enter *ADRC Outcomes*.
- Learn how to enter *Topics*.
- Learn how to enter *Notes*.

## Additional WellSky/SAMS Reference Guides and Resources

**For ADRC, Tribal ADRS, and DCS**
- Browser Configuration and Login Guide
- WellSky/SAMS Data Entry Guide for Aging and Disability Resource Centers, Tribal Aging and Disability Resource Specialists, and Dementia Care Specialists
- WellSky/SAMS Guide to Generating Reports for Aging and Disability Resource Centers, Tribal Aging and Disability Resource Specialists, and Dementia Care Specialists
- Client Tracking System Requirements Technical Assistance document
- WellSky/SAMS Online Help Guide


**For Benefit Specialists**
- Browser Configuration and Login Guide
- WellSky/SAMS Navigation and Formatting Guide for Benefit Specialists
- WellSky/SAMS Data Entry and Case Tracking Guide for Benefit Specialists
- WellSky/SAMS Guide to Generating Reports for Benefit Specialists
- WellSky/SAMS Quick Guide

# I. Overview of Documenting Consumer Interactions

Staff are required to record details of interactions with individuals and organizations. The staff person who talks to the *Caller* or *Consumer* is the individual who should enter the information into the database. Information collected during these interactions is then used to manage consumer interactions including providing follow-up services to consumers. Additionally, data collected during these interactions is then reported to the state on a monthly basis. Accurate recording of consumer contacts is critical in order to provide excellent customer service and maintain data integrity.

There are two types of interactions you'll document in WellSky/SAMS:
- *Contacts* represent a one-on-one interaction where information is exchanged between staff and an individual who contacts the agency, or is who is contacted by agency staff. Contact examples include an individual reporting a concern about themselves or another person, or a call from a community-based agency or provider. A contact may occur in-person, via telephone, virtually through video conference, or via written correspondence.
- *Activities* represent an outreach or marketing event, such as a group or individual presentation performed by staff. This includes one-on-one conversations when staff reach out to potential customers or providers for the purpose of marketing. Examples include discussions with nursing home discharge planners about the agency, presenting at a service organization meeting about the agency, and participation at health fairs.
  **Note**: Dementia care specialists report outreach and marketing events in DCS SharePoint. ADRC Specialists and Tribal ADRS who use WellSky/SAMS report outreach and marketing events in WellSky/SAMS.
  **Note: Activities discussed throughout this document refer to marketing and outreach interactions and are not related to the WellSky/SAMS Activities tracking section.**

In order to document contacts and activities, staff work primarily with two record types:
- *Call Records* are the method staff use to document contacts and activities. Each of these interactions should be detailed in a new *Call Record*.
- *Consumer Records* are used to track details about individuals, agencies, or providers who have made contact with your agency. These details typically include contact information as well as various demographics.

# II. Creating Call Records

*Call Records* reflect contacts or interactions with customers, authorized representatives, caregivers, customers' family, friends, neighbors, service providers, and other interested parties. These contacts may include telephone calls; in-person appointments at the office, hospital or nursing home; home visits; emails; and video conferences. A *Call Record* is created anytime there is an exchange of information with an individual or an organization where the agency receives information relating to a *Consumer*, provides information relating to a *Consumer*, or both. A *Call Record* is also created for any activity such as marketing and outreach, but only one Call Record should be created on behalf of the agency, even if multiple agency staff members participated. **All *Call Records* must contain at least one *ADRC Outcome* and one *Topic.***

Generally, you'll create a *Call Record* for each interaction as described in the previous

paragraph with a *Caller/Consumer*. Each call should be logged into the system within 1-2 business days of when the contact occurred. If necessary, utilize the *Call Summary Sheet* ([a printable version can be found here](#)) to log information until it can be entered into the WellSky/SAMS database.

**A. Creating a new Call Record from within an existing Consumer Record**

When creating a new *Call Record*, first determine if a *Consumer Record* already exists for the person whom the contact is regarding (the customer or the potential customer of any assistance provided), or the organization or event in the case of marketing and outreach activities.

1. Determine if a *Consumer* Record exists.
   a. In the *Main Screen Search Bar*, enter the *Consumer*'s name (last name, first initial/name). You might try different potential spellings in case the name was previously entered incorrectly.



Alternately, you may search for a *Consumer* by filtering your *Consumers List Screen*.
   b. Any matching record(s) will appear below the search bar.
      - If no matching record appears, proceed to step **II.B.**: *[Creating a new Call Record from the Main Navigation Bar.](#)*
      - If a *Consumer Record* exists, click on the desired record to open it, review any notes found in the *Notes Panel* of the *Consumer Record*, and proceed to the next step (B.1.b)

2. Open a new *Call Record Data Entry Screen*.
   a. In the *Consumer* Record, select the **Calls** tab.



**Note**: A list of all previous *Call Records* for this *Consumer* will appear. In the *Notes Panel* of each *Call Record*, there will likely be notes related to that call. It is good practice to review previous *Call Records*, particularly the *Notes Panel* of each *Call*
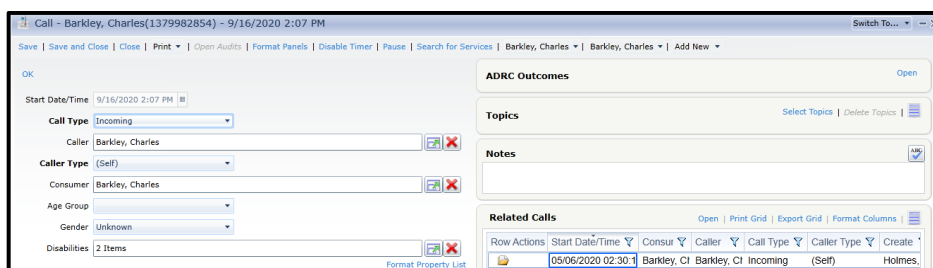
*Record*, for additional background information.

b. In the Calls tab select **Add New** from the menu options.
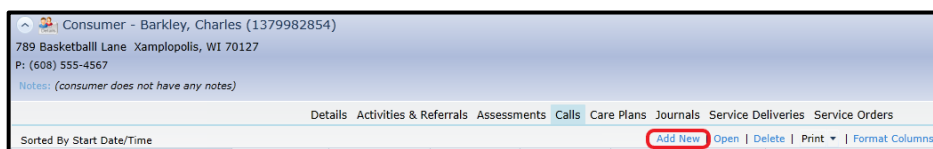


c. A *Call Record Data Entry Screen* will appear.



3. **Complete Start Date/Time Field (required)**
If you are creating the *Call Record* on the date the contact occurred, there is no need to modify this field. The *Start Date/Time* in the *Call Record Screen* will default to the date that the record is created. **Note**: You are not required to note the exact time of the call or contact, **but recording the actual date of the contact is important.**

If you are creating a *Call Record* on a date **after** the actual contact occurred:
a. Select **Disable Timer** in the Command Bar as illustrated below.



b. Click on the *Start Date/Time* field (or the calendar icon to the right of the field).
c. Modify the date of contact to reflect the date the contact actually occurred.

4. **Select a Call Type (required)**
a. In the *Call Type* field, click on the **dropdown arrow** menu.
b. Select the best option from the available choices.
   • Only one choice is permitted.
   • See Client Tracking System Requirements technical assistance document for a full list of *Call Type* options.

5. **Verify the Caller, Caller Type, and Consumer Fields have prepopulated accurately**
Because you're creating a new *Call Record* from within an existing *Consumer Record*, both the *Caller* and *Consumer* fields of the *Call Record* will default to the name of the *Consumer* whose record you opened. The *Caller Type* field will default to **(Self)**.

| 🔥 HOT TIP | **What is the difference between the *Caller* and the *Consumer* within a *Call Record*?** For the purposes of entering a new *Call Record*, the *Caller* is the person with whom you're interacting. The *Consumer* is the person who the contact is regarding. In either case, a *Consumer Record* is created in WellSky/SAMS **for both individuals**. |
|---|---|

If the *Caller* is someone other than the person or organization associated with the *Consumer Record* you used to create the new *Call Record*, perform the following steps, **in order**.

a. Change the *Caller Type* field from **(Self)** to the applicable selection found in the dropdown menu of options by clicking anywhere within the field and making your selection.



b. Add *Caller* field information
Although *Callers* **may** remain anonymous, you are strongly encouraged to obtain their contact information.
- If the caller chooses to remain anonymous, click on the red **X** located to the right of the *Caller* field. The *Caller* field will default to *Anonymous*. Leave this field in its default state and **do not** change to some other form of anonymous such as "Anonymous Female."

- If the *Caller* chooses to not remain anonymous, you must determine if a *Consumer Record* already exists for the *Caller*.
  1. Search for an existing record by selecting the **green arrow open dialog box** next to the *Caller* field.



  2. A *Search for Consumer* window will open.



  3. Enter the *Caller* name in the *Search for* field.
     - If a *Consumer Record* for the *Caller* already exists in the database:
       a. Select the correct *Consumer Record* from search results list at the bottom of the *Search for Consumer* window (illustrated above).
       b. Select **OK**.
       c. You'll automatically return to the *Call Record Screen*. The *Caller's* name will automatically populate the *Caller* field of the *Call Record Screen*.
     - If the search yields no existing *Consumer Record,* you will receive no matching results when you complete the search. In this case, you must add a new *Consumer Record* to the database.
       a. Click on the **Add New** button in the *Search for Consumer* window, as illustrated below.

b. A new *Add Consumer* screen will appear, as illustrated below.



c. For detailed instructions on completing the new *Consumer Record*, see section **III**: *Creating Consumer Records* below.
d. After completing and saving the *Consumer Record*, you will be returned to the *Call Record Data Entry Screen*.

6. **Complete the *Age Group* Field** (required for individuals, **not** organizations)
   **Note**: This field relates to the person identified as the *Consumer* in the *Call Record*.
   - If the *Date of Birth* field was completed in the *Consumer Record*, this field will prepopulate.
   - If Date of Birth field is blank:
     a. In the *Age Group* field, click on the dropdown arrow and a menu of choices will appear.
     b. Select the appropriate choice from the menu of options.
   - Alternately, if you know the *Consumer's* birthdate, you may edit their *Consumer Record* accordingly. (See section **IV**, *Editing an Existing Call or Consumer Record.*)

7. **Complete the Gender Field** (required for individuals, **not** organizations)
   **Note**: This field relates to the person identified as the *Consumer* in the *Call Record*.

- If the *Gender* field was completed in the *Consumer Record*, this field will prepopulate.
- If the field is blank:
  a. In the *Gender* field, click on the dropdown arrow and a menu of choices will appear.
  b. Select the appropriate choice from the menu of options.
  c. The *Gender* field will automatically update in the *Consumer Record.*

8. **Complete the Disabilities Field** (required for individuals, **not** organizations)
   **Note**: This field relates to the person identified as the *Consumer* in the *Call Record*.

   During conversations, the *Consumer's* disability or characteristics may be revealed. Staff are not required to ask a person's disability; they are encouraged to use their best judgment and select the most appropriate option(s). This field will automatically update if the field was completed in an earlier *Call Record* for the same *Consumer*.

   To complete the *Disability Type* field:
   a. Click on the **green arrow open dialog box** field and the *Select Disabilities* window will open.



   b. Check the boxes to the left of **all** disability types that apply.
      **Note**: *Unknown* may be selected if the individual's disability is not known. If one or more disability types are selected, *Unknown* cannot be selected.
   c. When all appropriate disability choices have been selected, click **OK**.

9. **Select ADRC Outcomes** (required for **both** individuals and organizations)
   *ADRC Outcomes* indicate the type of activity or action that was completed by staff. Every contact must have **at least one** *ADRC Outcome* attached to that *Call Record* to meet state reporting requirements. For a complete list of available *ADRC Outcomes* including descriptions, see the Client Tracking System Requirements technical assistance document.
   **Note**: Tribal ADRSs and DCSs are also required to select *ADRC Outcomes* even though they do not work for an ADRC.

To add *ADRC Outcomes* to a *Call Record*:
a.   Go to the *ADRC Outcomes Panel*
b.   In the *ADRC Outcomes Panel Command Bar*, click **Open**
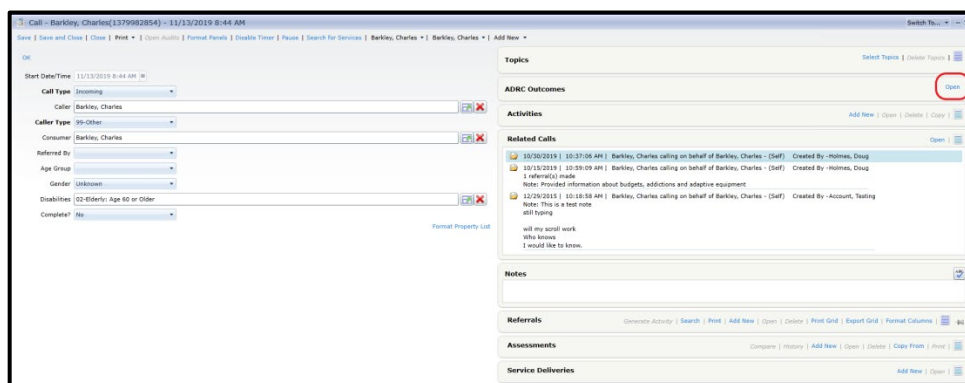


c .  A list of all possible ADRC Outcomes will display.
d.   Click on the **check box** so that a check mark appears to the left of every *ADRC Outcome* that applies to the *Call Record*.
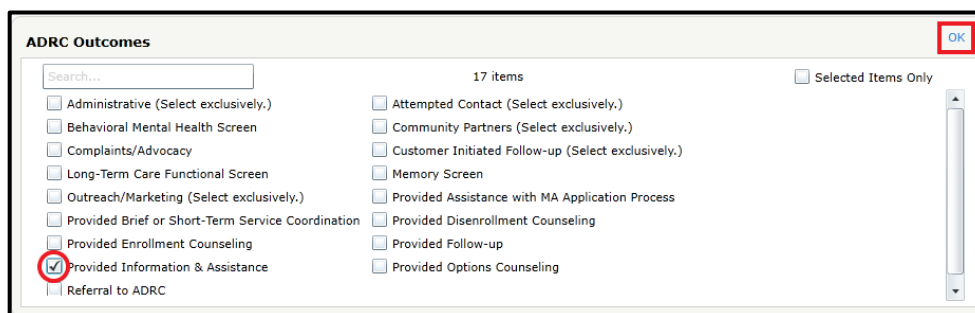


e.   When all applicable outcomes have been selected, click **OK** in the *Panel Command Bar*.

**Note**: See Client Tracking System Requirements technical assistance document for specific information about adding the following exclusive ADRC Outcomes:
   - Administrative
   - Attempted Contact
   - Community Partners
   - Customer Initiated Follow-up
   - Outreach/Marketing

10. **Select Topics** (required for **both** individuals and organizations)
*Topics* are subjects discussed during the contact. **At least one** or more *Topics* must be entered for each *Call Record*. For a complete list of available *Topics* including descriptions, please see the Client Tracking System Requirements technical assistance document.

To add a *Topic* to a *Call Record*:

a. In the *Call Record Screen*, go to the *Topics Panel*.
b. In the *Topics Panel Command Bar*, click on **Select Topics.**



c. A large list of *Topics* will appear. Click on the **check box** so that a check mark appears to the left of every *Topic* that applies to the contact.



d. In the *Topics List Screen Command Bar*, click **OK**
   **Note**: At the bottom of the *Topics List Screen*, there is an additional section with several additional fields (*Default Date, Time to apply to each Topic, Total Time*, and *Default Planning*). **Ignore** these fields.

11. **Enter Call Record Notes** (required for **both** individuals and organizations)
If the *Consumer* is already in the system, prior to entering notes regarding the current contact with the *Caller/Consumer*, staff should view *Call Record Notes* from any previous contacts the *Caller/Consumer* has had with the agency. *Notes* from previous *Call Records* will appear in the *Related Calls Panel* of the new *Call Record* being created.

After reviewing any previous notes, to add notes for the current contact with the *Caller/Consumer*:
a. Click on the white space in the *Notes Panel* of the new *Call Record* and enter all pertinent information about the contact.



**Note**: For contacts with community partner organizations, the name of the person at the community partner organization with whom the interaction occurred should be noted here.

See guidelines for entering notes in the *Call Record Notes* section of the [Client Tracking Systems Requirements] technical Assistance document.

## B. Creating a new Call Record from the Main Navigation Bar
1. **Open a new Call Record**
   a. Go to the *Main Navigation Bar.*
   b. Click on **Calls**.
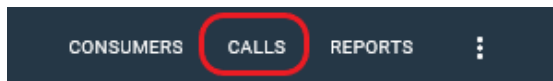


c. Select **New Call** from the dropdown list.



d. A blank *Call Record Data Entry Screen* will open.

e. The remaining steps will follow the process described in section **II.A.3.** above.

**Note**: When creating a new *Call Record* using the *New Call* selection on the *Main Screen Command Bar*, the *Caller* and *Consumer* fields will default to "*Anonymous*". Although both *Callers* and *Consumers* may remain anonymous, you are encouraged to obtain as much information as possible about the *Caller/Consumer*. In order to populate the *Caller* and *Consumer* fields, you'll select the **green arrow dialog box** (shown below) as described in section **II.A.5.** above.



# III.    Creating Consumer Records

### A. Open an Add Consumer Data Entry Screen
This can be accomplished in two ways:
- During the process of creating a new *Call Record* as described in section **II**
**OR**
- By clicking **the circular icon with a plus sign** in the *Consumers List Screen*.
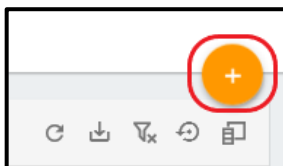


With either method, the new *Consumer Data Entry Screen* looks like this:

## B. Complete the data fields in the Add Consumer Screen.

Use the following guidelines:

- If you are creating a *Consumer Record* for someone who is in need of assistance or services, complete **all** fields in the *Consumer Record* to the best of your ability. As much as possible, be sure to enter information in the fields required for reporting including:
  - First Name/Last Name
  - Gender
  - Date of Birth
  - Ethnic Races
  - Phone: Home and Mobile
  - E-mail Address
  - Address: Home and Mailing
  - In Poverty
  - Lives Alone

  Please refer to the Client Tracking System Requirements technical assistance document for detailed information on required fields.
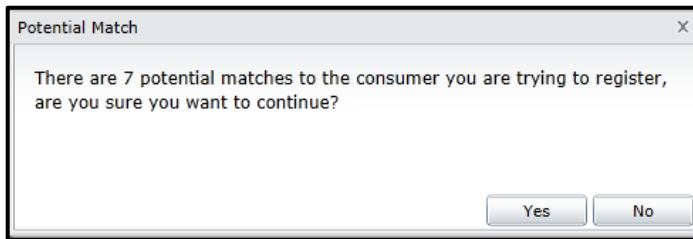
- If you are creating a *Consumer Record* for a *Caller* who is calling for information or assistance on behalf of someone else, enter in the *Consumer Record*, the person's first and last name, phone numbers, home and mailing addresses (if different), e-mail address, and any other required field information they are willing to provide.

**Special note: When adding a *Consumer* who might be considered dangerous or a frequent *Caller* with repetitious questions**, agencies may consider adding an asterisk (*) after the *Consumer's* last name and adding notes describing the situation in the *Consumer Record Notes Panel*. This practice is optional, and its use should be determined at the local level. For additional information, refer to Client Tracking System Requirements technical assistance document. Also see section **IV**, *Editing an Existing Call or Consumer Record* for instructions on adding this information to an existing *Call* or *Consumer Record*.

## C. Save the Consumer Record

1. After completing all fields to the best of your ability, click **OK** in the lower right corner of the screen.

**Note**: It is possible the following window will appear. Select **Yes** to continue, and research the issue at a later time in order to determine if duplicates exist.

```
Potential Match                                            ×

There are 7 potential matches to the consumer you are trying to register,
are you sure you want to continue?




                                          Yes          No
```

---

**Recommendations to Avoid Creating Duplicate Consumer Records:**

➤ Ask the *Caller* (or *Consumer*) to spell their first and last names so they are accurate in the system.
➤ Check for alternative spellings in case the name in an existing record was misspelled
➤ Be aware of names with Junior or Senior designations.
➤ Search for an existing *Consumer Record* each time you add a new contact.
➤ Clear out duplicates in your database in a timely manner by contacting the individuals listed in the Client Tracking System Requirements Technical Assistance document.

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## IV. Editing Existing Call and Consumer Records

After you've created and saved a *Call* or *Consumer Record*, you might need to a return to an existing record to change or add information. Editing a record may involve changing or adding *Property List* information located on the left side of the *Record Screen* (the section that starts with *Basic Information* in a *Consumer Record – Details Screen* and the section that starts with *Details* in a *Call Record Screen*). You might also wish to change or add information in one or more of the *Panels*, typically located to the right of the *Call Record* and *Consumer Record – Details Screens.*

### A. Editing Call Details and Consumer Basic Information Sections
1. Open a *Call Record* or a *Consumer Record.* (The editing process is the same for both.)
2. In the upper left corner of the *Record Screen*, click Open.
   • In the *Call Record Screen*, it looks like this:

- In the *Consumer Record – Details Screen,* it looks like this*:*



3. A screen with editable fields will open.
4. Go to the field you wish to edit and add the new information.
5. Click **OK** in the upper left of your *Edit Screen* to save your changes.
6. Click **Save** or **Save and Close** to save your changes in the *Call* or *Consumer Record.*

**HOT TIP**

If a data field is missing from your display, you may need to "activate" the field by clicking on **Format Property List** located in the lower right of the "edit" screen (see below) and selecting any missing field you wish to view on your *Record Screen*.

## B. Editing Information Contained in Panels

*Panels* are sub-records located within a *Consumer* or *Call Record* that contain specific categorical information such as phone numbers, addresses, recent calls, etc. They are typically located on the right side of a *Record Screen*. To edit information contained in a *Panel*:

1. Open a *Call Record* or a *Consumer Record*. (The editing process is the same for both.)
2. Go to the *Panel* you wish to edit.
3. In the *Panel Command Bar*, select the appropriate action based on the information you wish to add or change.
4. Add or change the desired information within the *Panel Record.*
5. Click **OK** to save your changes in the *Panel Record.*
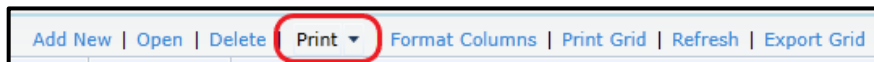6. Click **Save** or **Save and Close** to save your changes in the *Call* or *Consumer Record.*

**HOT TIP**

If a panel is missing from your display, you may need to "activate" the panel by clicking on **Add New** in the *Call* or *Consumer Record Command Bar* and selecting the desired panel to add to the record.
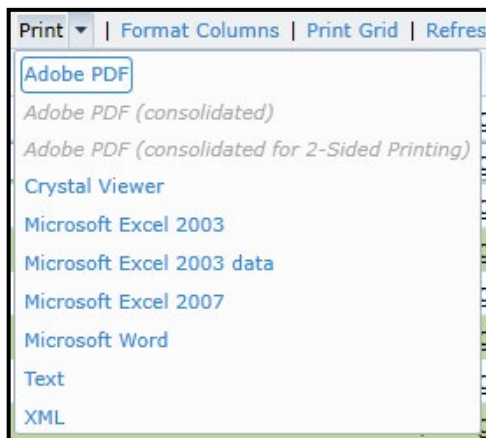
# V. Printing Records

If you want to print an individual *Consumer* or *Call Record*, you can print from within the *Record* or from the *List Screen*.

A. Click on the **Print** dropdown command located on the *Command Bar* of each of the screens, as illustrated below.

Add New | Open | Delete | Print ▾ | Format Columns | Print Grid | Refresh | Export Grid |

B. Select the format for printing. (Adobe PDF is used most frequently.)

Print ▾ | Format Columns | Print Grid | Refres

Adobe PDF
*Adobe PDF (consolidated)*
*Adobe PDF (consolidated for 2-Sided Printing)*
Crystal Viewer
Microsoft Excel 2003
Microsoft Excel 2003 data
Microsoft Excel 2007
Microsoft Word
Text
XML

C. An options window will display, as illustrated below, allowing you to choose which information you would like to includ in the printout. The available options will vary depending on the type of record or list you're printing.
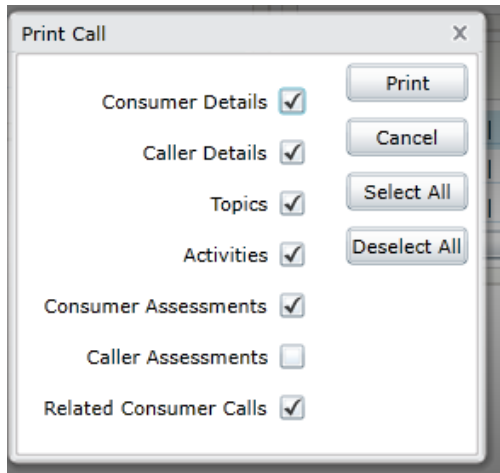
After selecting the items to include, click on the **Print** button and your printout will begin.

🔥
**HOT TIP**

> Want to see a history of all *Call Record Notes* for a specific client? See the steps below.

To view and print *Notes* from a *Call Record* **including** *Notes* from all related *Calls:*
1. Open the desired *Consumer Record.* (It will default to the *Consumer Record-Details Screen.*)
2. Select **Calls** from the *Consumer Record Navigation Bar* to open the *Consumer Record-Calls Screen*.
3. Click on the **dropdown arrow** next to *Print* on the *Consumer Record-Calls Screen Command Bar*.
4. Select **Adobe PDF** (or your preferred output option).
5. Select all options you wish to print by clicking on the **check box** for each preferred option.
6. Select **Print**.


## VI.   Creating Activity Records (optional)

Creating an *Activity Record* as a reminder to complete a future task is **optional**. You can create an *Activity Record* as a reminder to follow up with a customer, a reminder to check on the status of an application, or a reminder to complete other customer-related tasks. Optional *Activity Records* can be created within a related *Call Record*, within the *Consumer Record – Activities Screen*, or from your main *Activities List Screen*.

**Note**: More than one *Activity Record* may be created for the same customer. For example, you might create a required *Activity Record* related to a disability application, and an optional *Activity Record* to document a separate future action.

Optional *Activity Records* may be created in one of several ways:

- From the *Activities Panel* of a *Call Record*
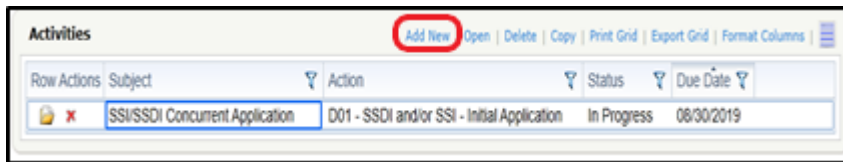


- From the *Activities & Referrals Tab* of a *Consumer Record*. The record created with this method will be prepopulated with the customer's name. Select **Add New** in the menu of this tab to create a new Activity Record.
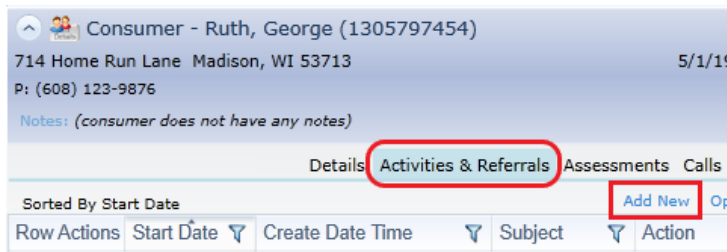


- From the main *Activities List Screen* that displays when clicking on **Activities** in the *Main Navigation Bar*. Select the orange circle with the plus sign to create a new *Activity Record*.
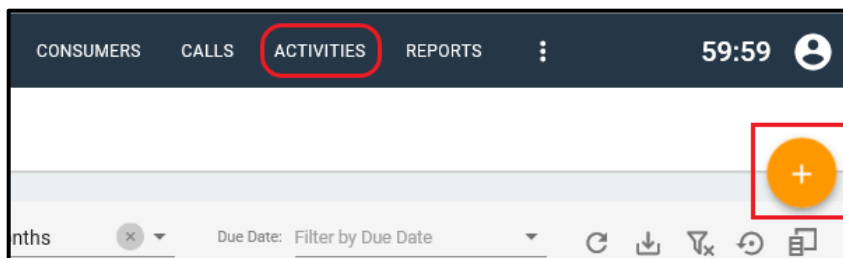


The following fields will be useful for creating *Activity Records* for the purpose of scheduling a follow-up action:
- *Follow-up Date* – Select the date you plan to complete your follow-up action
- *Consumer* – To populate the *Consumer* field, click on the icon with the green arrow and a pop-up window will open. Search for the *Consumer* that's associated with the *Activity* and double-click to add the *Consumer* to the *Activity Record*. (Note that the *Consumer* name will be prepopulated when creating the *Activity Record* from within the *Consumer Record-Activities & Referral* tab.)
- Subject – Enter the purpose of your follow-up action.
- *Action* – Select the most appropriate choice from the drop-down menu. For optional follow-up activities, the best choice will usually be **Follow-up Call to Client.**
- *Status* – Select either **Not Started** or **In Progress** when the follow-up *Activity* has not yet been completed. Select **Complete** after the Activity has been completed.
- *Date Completed* – Enter the date the *Activity* was completed.

To avoid confusion, it is recommended you hide unnecessary fields from view. Refer to the "WellSky/SAMS Navigation and Formatting Guide" instructions for more information on formatting your *Activity Record Screen, Consumer Record-Activities* tab, main list of *Activity Records,* and any

*Activities panel*s (such as the panel located within a *Call Record)*.

Use the main list of *Activity Records* to track your upcoming or completed *Activities*. To do this, you'll use sorting and filtering options as described in the "WellSky/SAMS Navigation and Formatting Guide" to produce a meaningful list based on the results you're looking for. Here are some helpful hints for setting up your list of *Activity Records*:

- Be sure that all fields that are displayed in your individual *Activity Records* are also displayed in your main *Activities* list.  Also be sure that the *Create User* column is displayed on your main *Activities* list as this field identifies the staff person that created the record.
- To view only *Activity Records* that are assigned to a specific staff member, in the *Create User* column, use the filtering option of **Contains** and enter the staff member's name in the space next to the applied filter icon. (Note, if someone other than the staff member that created the *Activity Record* is assigned to complete the follow-up action, an alternate method is to enter the assigned staff members name anywhere within the *Subject* field of the *Activity Record*. The *Subject* column on the main *Activities* list can be used to filter records to achieve the desired result.)
- To view only *Activity Records* that are not yet completed, in the *Status* column, use the filtering option Does not contain and type **"Completed"** in the space next to the applied filter icon.
- To view only *Activity Records* within a specified date range, in the *Follow-Up Date* column, use the filtering option **Between** and enter the applicable Start and End dates in the space provided.
- To sort your *Activity Records* in ascending order, click anywhere in the *Follow-Up Date* header row cell. You'll see an upward pointing arrow to the right of the field name. To sort in descending order, click anywhere in the header row cell again so that you see a downward pointing arrow to the right of the field name.