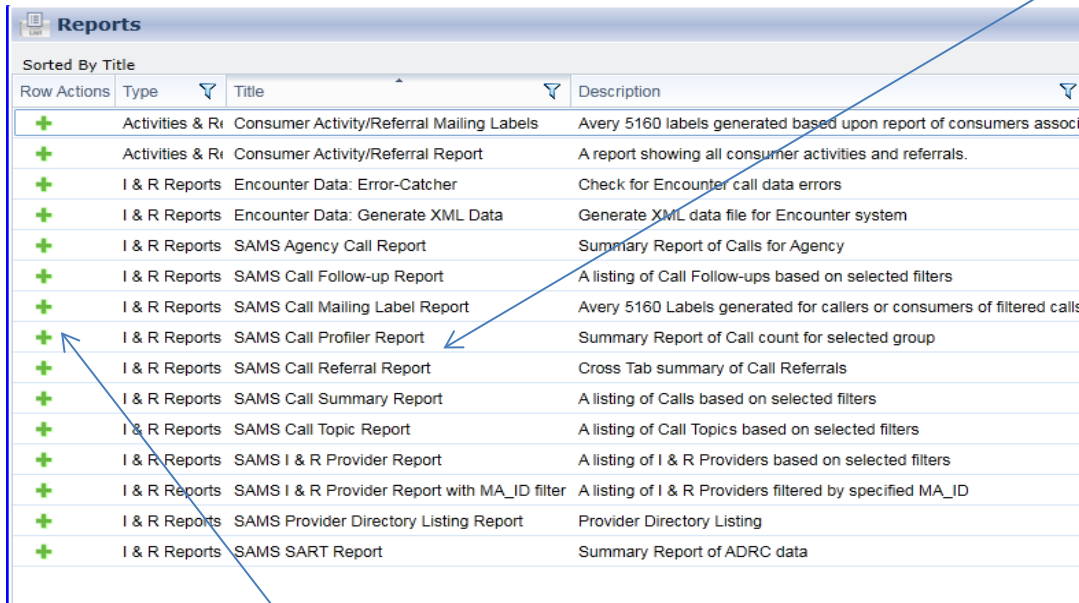


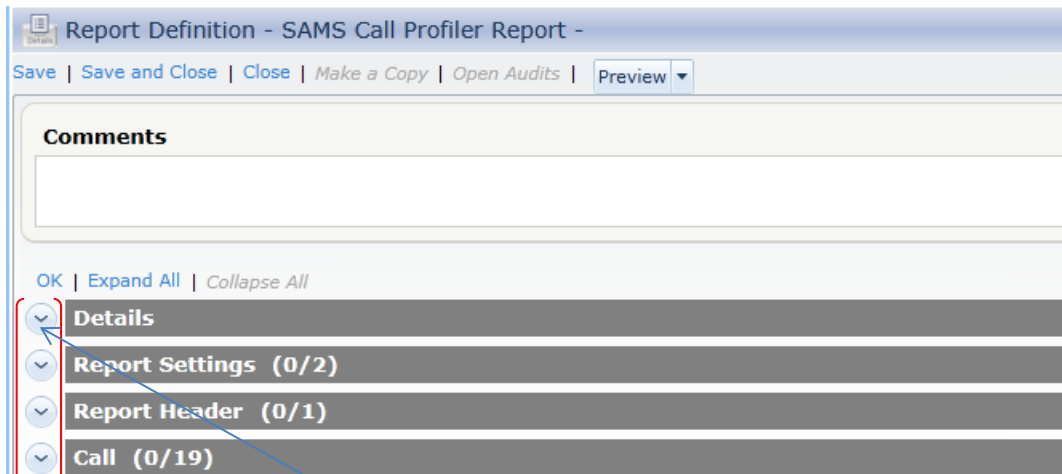
SAMS Call Profiler Report

The following report can be used for gathering a variety of information being entered by ADRC staff. With this report, data can be produced on Anonymous Calls, Unduplicated Callers, Home Visits, and Walk-ins. Further analysis can be done with the various selections provided within the report definition.



Row Actions	Type	Title	Description
+	Activities & R	Consumer Activity/Referral Mailing Labels	Avery 5160 labels generated based upon report of consumers associ
+	Activities & R	Consumer Activity/Referral Report	A report showing all consumer activities and referrals.
+	I & R Reports	Encounter Data: Error-Catcher	Check for Encounter call data errors
+	I & R Reports	Encounter Data: Generate XML Data	Generate XML data file for Encounter system
+	I & R Reports	SAMS Agency Call Report	Summary Report of Calls for Agency
+	I & R Reports	SAMS Call Follow-up Report	A listing of Call Follow-ups based on selected filters
+	I & R Reports	SAMS Call Mailing Label Report	Avery 5160 Labels generated for callers or consumers of filtered calls
+	I & R Reports	SAMS Call Profiler Report	Summary Report of Call count for selected group
+	I & R Reports	SAMS Call Referral Report	Cross Tab summary of Call Referrals
+	I & R Reports	SAMS Call Summary Report	A listing of Calls based on selected filters
+	I & R Reports	SAMS Call Topic Report	A listing of Call Topics based on selected filters
+	I & R Reports	SAMS I & R Provider Report	A listing of I & R Providers based on selected filters
+	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
+	I & R Reports	SAMS SART Report	Summary Report of ADRC data

Click on the green cross on the left side of the report, or double click on the report to open a definition. The definition for this report will look like this:



Report Definition - SAMS Call Profiler Report -

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

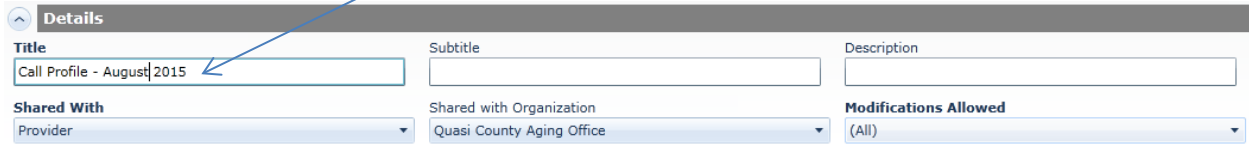
Comments

OK | Expand All | Collapse All


- Details
- Report Settings (0/2)
- Report Header (0/1)
- Call (0/19)

Click on the arrow next to each section in order to expand it for data entry. It is important to give the definition a title in the **Details** section of this report.

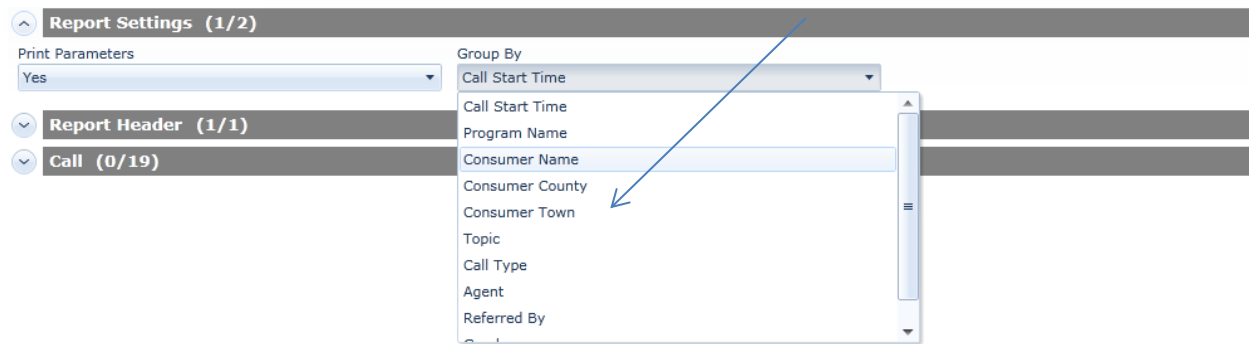
The title is identified, but the other options are left in their default settings.



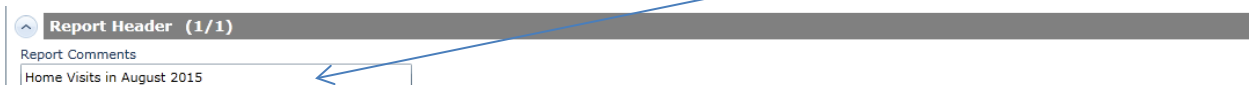
Under Report Settings, select **Yes** to print the parameters of the report. It is best practice to print the parameters to show exactly what the report will generate.



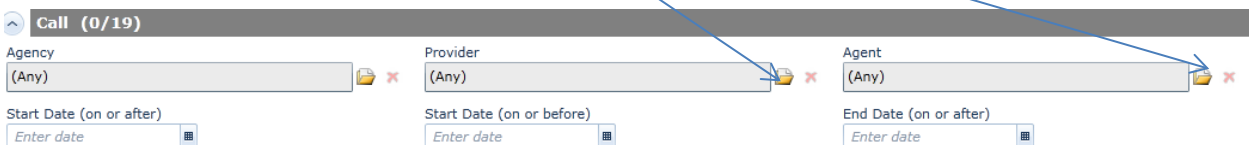
In **Report Settings**, one of the most important selections is in the **Group By** box. For this report, select **Consumer Name**. This will identify unduplicated and anonymous callers to create a more accurate report. Other selections, such as specific towns can be generated from the address listed in SAMS.



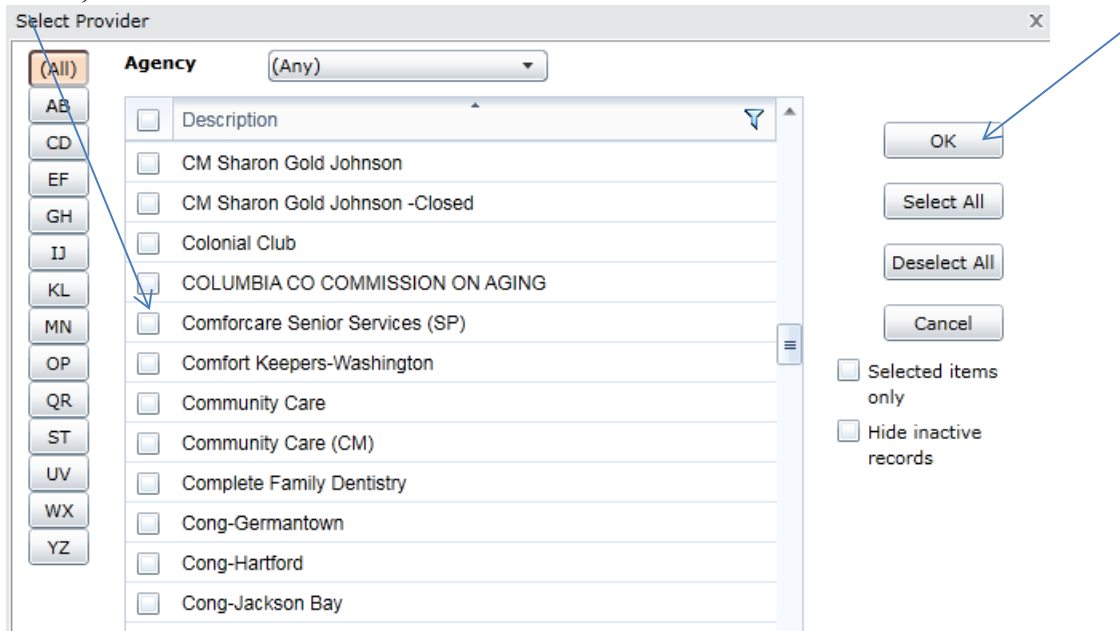
The **Report Header** is optional, but can be selected to give a subheading to the report. This example shows Home Visits for August 2015. Leaving this blank will still create a report.



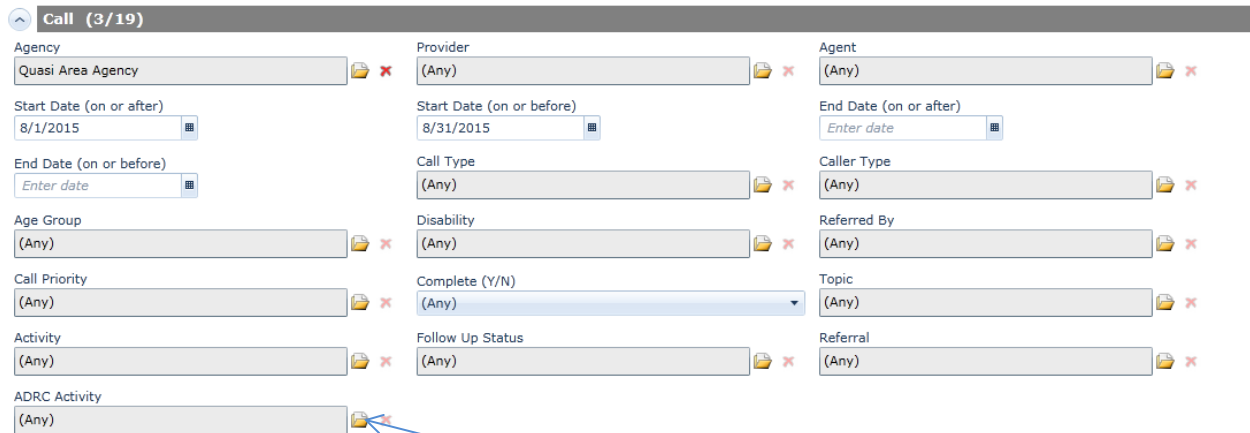
Finally in the **Call** section, enter a **Provider** or an **Agent** by clicking on the yellow folder next to the box.



Below is an example of items that can be selected for Provider. Click on at least one of the boxes, and then click **OK**.



It is not necessary to select an agency, because SAMS will automatically run the report for an agency or region. However, selecting a provider or an agent by clicking on the yellow folder next to those boxes will hone in on a specific office or ADRC staff's (agent) work.



By selecting a specific activity in the box (ADRC Activity), data will show how many outcomes are being selected in a specific period of time. This information can be further analyzed by selecting a specific agent within the ADRC. If the preference is to see all the ADRC activities, leave this box in its default setting (Any).

Select ADRC Activity

(All)	<input type="checkbox"/> Description
AB	<input type="checkbox"/> 01-Provided Information & Assistance
CD	<input type="checkbox"/> 02-Provided options counseling
EF	<input type="checkbox"/> 03-Provided follow-up
GH	<input type="checkbox"/> 04-Administered long-term care functional screen
IJ	<input type="checkbox"/> 05-Referred to economic support
KL	<input type="checkbox"/> 06-Provided assistance with Medicaid application process
MN	<input type="checkbox"/> 07-Referred for financial-related needs other than economic support
OP	<input type="checkbox"/> 08-Referred for private pay service options
QR	<input type="checkbox"/> 09-Provided brief or short-term services or service coordination
ST	<input type="checkbox"/> 10-Provided youth transition support
UV	<input type="checkbox"/> 11-Provided enrollment consultation
WX	<input type="checkbox"/> 12-Provided disenrollment consultation
YZ	<input type="checkbox"/> 13-Provided assistance/referral for health promotion or information
	<input type="checkbox"/> 14-Referred for mental health services
	<input type="checkbox"/> 15-Referred for substance use services
	<input type="checkbox"/> 16-Consumer refused (PAC related)

Selected items only
 Hide inactive records

In addition, the **Start Date (on or after)** and **Start Date (on or before)** can be selected for the specific period of time. For an accurate report, it is important to select the start dates as opposed to the end dates.

Call (0/19)

Agency (Any) Provider (Any) Agent (Any)

Start Date (on or after) Start Date (on or before) End Date (on or after)

Enter date Enter date Enter date

Click on the square to the right of each box and a small calendar will appear.

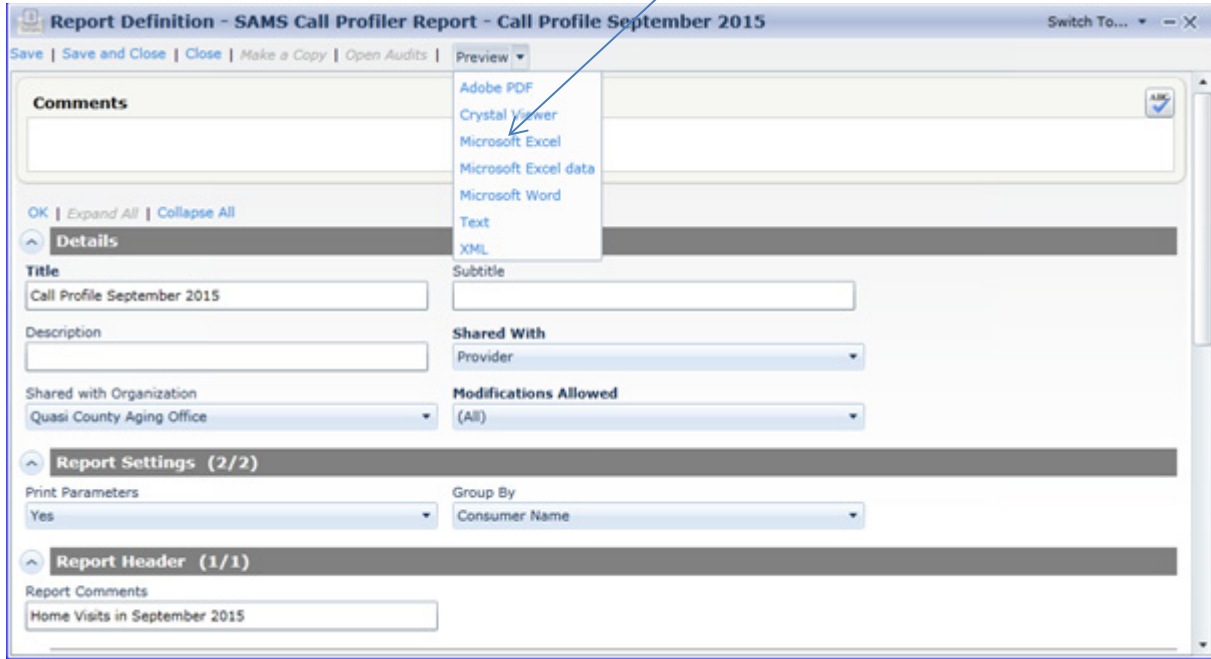
Start Date (on or before)

9/30/2015

September - 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
36	30	31	1	2	3	4
37	6	7	8	9	10	11
38	13	14	15	16	17	18
39	20	21	22	23	24	25
40	27	28	29	30	1	2
41	4	5	6	7	8	9

(Any)

After entering dates, in order to run the report, go to **Preview** in the top row and select the method to view the report.



Below is an example of how parameters may look at the beginning of the report. *Note that the data contained in this report has been taken from a user testing environment.

SAMS Call Profiler Report

- Home Visits in August 2015

Report Comments:

Home Visits in August 2015

Parameters List:

Report:

Print Parameters:	Yes
Group By:	Consumer Name
Call:	
Agency:	Quasi Area Agency
Provider:	(Any)
Agent:	(Any)
Call Start Date (on or after):	8/1/2015
Call Start Date (on or before):	8/31/2015
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:	(Any)
Activity:	(Any)
Followup Status:	(Any)
Referral:	(Any)
ADRC Activity:	(Any)

Below is an example of a report that is run by using the **Call Type** in the Group By box listed in Report Settings (see page 2 for the selection examples). By using this report, the number and type of calls recorded in SAMS during a specified period of time may be viewed.

SAMS Call Profiler Report

9/16/2015

- Consumer Name Report - Office/Agent X

Call Type	# of Calls
Email	29
Fax	1
Home visit	79
Incoming	415
Office visit (scheduled)	20
Outgoing	214
Walk-In	120
Written correspondence	7
Total number of unduplicated calls:	885
Total number of unduplicated callers:	527

Note that the total number of unduplicated calls is actually the total number of calls within the given time frame. This number will typically match the total number of calls in the Agency Call Report for the same time frame. The total number of unduplicated callers is the actual number of unduplicated calls.

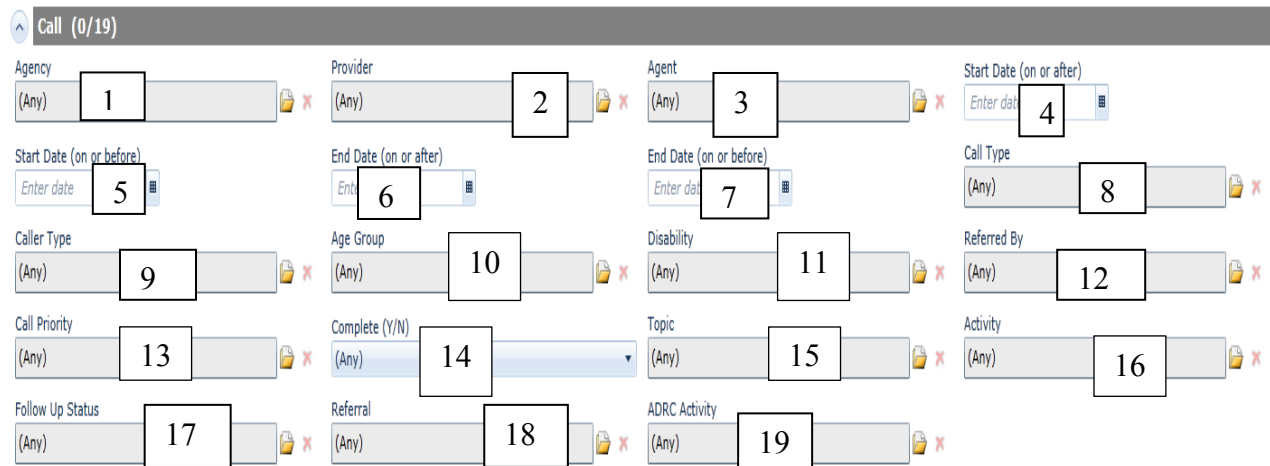
Here is an example of a report that uses the **Consumer Name** in the Group By box in Report Settings.

SAMS Call Profiler Report

- Consumer Name Report - Office/Agent X

Consumer Name	# of Calls
(Anonymous)	128
Confidential	1
	3
	2
	2
	1
	2
	6
	1
	3
	3
	4

Below are all the fields listed in the SAMS Profiler Report **Call** section:



The screenshot shows a filter bar for the 'Call' report with 19 fields, each with a number in a box: Agency (1), Provider (2), Agent (3), Start Date (on or after) (4), Start Date (on or before) (5), End Date (on or after) (6), End Date (on or before) (7), Call Type (8), Caller Type (9), Age Group (10), Disability (11), Referred By (12), Call Priority (13), Complete (Y/N) (14), Topic (15), Activity (16), Follow Up Status (17), Referral (18), and ADRC Activity (19).

Each of the numbers above correlates to information below that may be provided in a report. Note that the report is dependent on specific fields in SAMS call records that are being completed. For instance, if the agency does not record anything in the activity record, a specific report on follow up status cannot be generated.

1. This field narrows the results by agency. Leave it as the default setting, (Any) to get the report.
2. This field narrows the results to a specific office. (Note: for regional ADRCs, if this is left with the default setting, results will be for the whole region.)
3. This field can narrow down results to a specific ADRC staff. (Note: if left with the default setting, results will be for all staff in the ADRC.)
4. Enter the start date for data collection. (The report will include data entered on the date entered here.)
5. Enter the end date for data collection. (The report will include data entered through the date entered here.)
6. **Do not use this field.**
7. **Do not use this field.**
8. This field will narrow results by call type, such as: home visit, walk-in, scheduled appointment, etc.
9. This field will narrow results by type of caller (i.e., caregiver, agency or other professional) and denotes if the caller was the consumer, if the call was outgoing, or if the ADRC made the contact.
10. This field can narrow the report to calls by the consumers' age group.
11. This field can limit the report to calls by disability type.
12. This field can narrow the report to calls by who referred the customer to the ADRC.
13. This field narrows calls by the level of urgency selected.
14. This field enables the report to list only complete or incomplete calls.
15. This field narrows the calls to only selected topics discussed.
16. This field gives information on calls with selected activities.

17. This field narrows results to only calls with the selected follow up status. Note: If ADRC staff are tracking follow-ups using the activity tab in the call record, this generates a report to track which calls require a follow-up.
18. This field narrows calls by the referrals made to selected resources.
19. This field narrows calls to only those with ADRC activities. Note: This ensures all calls being displayed in a given report are in fact “Contacts” and have a designated ADRC activity selected.