WA CLC-GetCare User Manual: I&A New Contact and Follow-Up & Stats Module

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About this Manual

Welcome to the WA CLC I&A New Contact and Follow-Up & Stats Module User Manual. This manual is intended to serve as a guide as you track consumer contacts within the GetCare system.

As you will see in this manual, the I&A module in GetCare is closely intertwined with the listing manager tools. The listings you search for within the New Contact and Follow-Up & Stats are the same listings that you can access to view and edit in the Listing Manager module. The more accurate and up to date the listings are, the better you will be able to provide consumers with referrals. If you notice that listings are inaccurate or missing it is important to contact the Resource Directory Specialist in your service area to correct the issue.

Please note that the WA CLC-GetCare system (and therefore this manual) is subject to alteration. Modifications/updates to the manual may result from changes in DSHS policies and procedures, GetCare system upgrades, or other factors.

The GetCare system was developed by and is the copyrighted property of RTZ Associates. The modules of GetCare specific to listing manager and I&A are leased by the State of Washington and made available to the WA CLC local programs. Use of GetCare and this manual is restricted to authorized end users of the WA CLC-GetCare system. RTZ can be contacted at wahelp@getcare.com.

Logging In

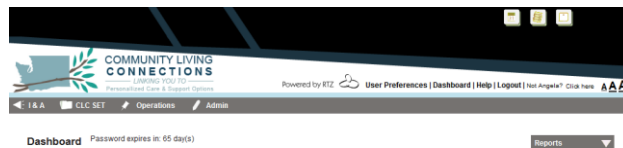Clicking on https://washingtoncommunitylivingconnections.org/paceseam/ will take you to the login screen (shown below). Enter your username and password and click **Login**. If you have misplaced or need to change your password, contact RTZ at wahelp@getcare.com.

Once you log on, a notification in the upper left informs you when your password will expire.


You will also see the following statement:

This system contains Protected Identifying and/or Health Information. All federal and state laws protecting confidential client information apply. You are authorized to view only those records of clients who are being served by you and your program. Violation of patient privacy may subject you to substantial monetary penalties and/or civil or criminal action pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA), the Revised Code of Washington (RCW) Chapter 70.02,RCW 74.04.060, and other federal and state privacy laws.

On the top right, **User Preferences** will allow you to:
1. Re-set your password
2. Re-set your signature password.
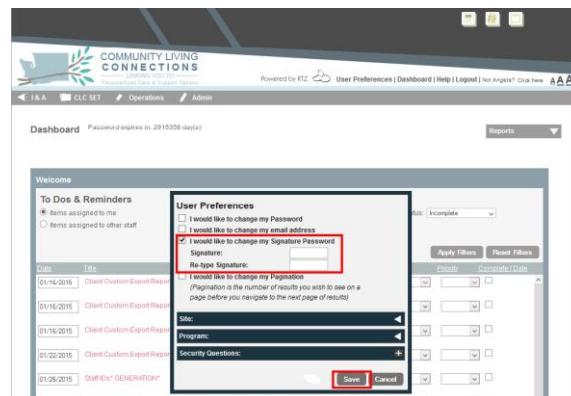
Above the password notification, you will see the dark grey menu bar. Menu categories include I&A, CLC SET, and Operations. In order to add a new call or interaction, hover over I&A to

expand its menu. Click on the **New Contact** section in the dropdown menu. Selecting this opens the **New Contact** page.
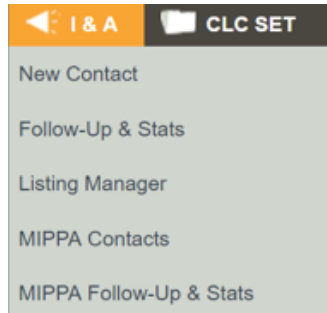
The New Contact Page

On the New Contact page, you will be able to record incoming and outgoing calls, make referrals, and provide assistance to callers.

Tracking Call Information

The first several fields on the **New Contact** page allow you to collect information about the caller (and the consumer who is the subject of the call, if the two are not the same).

Use the **Type of Contact** field to identify how the contact was made, and the **How did you hear about us?** field to identify how the caller heard about the WA CLC. This information helps your agency learn what outreach is working or not, as well as plan new strategies for reaching target populations

New Contact

Type Of Contact	⌄	How did you hear about us?	⌄

E-mail
Fax
In Person
Mail
Other
Phone
TTY
Walk-in

If Gatekeeper is selected for "How did you hear about us?", a new data field will open up for recording the type of Gatekeeper. This helps your agency identify successful gatekeeper trainings and gatekeeper types that may need additional training.

How did you hear about us? Gatekeeper ▾
Gatekeeper Type: ▾

Faith Community
Financial Institution
Friend/Neighbor
Other
Postal worker
Transit Systems
Utilities company

▾ Program Type Quick Se

Use the **Caller/Referral Contact** menu to identify the caller category. Note – if the caller is calling for himself or herself, then *Person 60 or over*, or *Person under 60* can be chosen.

Caller/Referral Contact ⌄

Agency/ Professional
Caregiver
Community gatekeeper
Family member
Friend/neighbor
Other
Person 60 or over
Person under 60

Time Tracking

Date and time stamp fields are located at the top right corner of the New Contact page. The date field is for the date the call took place, with a default of today's date. You can choose to change this date by clicking on the date field and clicking on a different date using the date picker selector or typing a new date in the field.

| Type Of Contact | ⌄ | How did you hear about us? | ⌄ | Date 05/21/2015 | Time 03:37 PM to |
| Caller/Referral Contact | ⌄ | Call length min | | | |

The time field starts as soon as the call is opened and stops when the call is saved and completed, or marked incomplete. Each time a user opens up a call, the call timer starts again. **NOTE:** If a user has the JAWS screen reader (for blind/low vision) then the call tracker is disabled. The total call length in minutes will display off to the right of the Caller/Referral Contact field. It will automatically calculate the number of minutes that the call has been open.

Identifying the Caller and Consumer

Use the **Consumer Section** to identify whether the consumer is **New** or **Existing** or **Anonymous**. Instructions for completing contact information for a **New** or **Existing** consumer can be found starting with the New or Existing Consumer Contacts section of this manual. Instructions for completing **Anonymous Consumer** contact information can be found starting with the Anonymous Consumer Contacts section of this manual.

Note: Wait to determine whether adequate contact information cannot be collected before selecting Anonymous.

If the caller is not the same as the consumer, click on the **Calling for: Someone Else** button to record the caller's information (you can enter information for both a consumer and a separate caller). Instructions for completing non-consumer contact information can be found below the caller section.

Caller

Use the **Caller** section to record information about calls made by agencies, caregivers, family, neighbors, or others on behalf of a consumer. When you click Caller, last name, first name, phone number, and agency search fields appear. Callers are stored in a separate data pool from consumers. If the same person needs to be a caller and a consumer in the system then you will have to add them to each pool once.

Caller				
Last Name, First Name	Phone number	Agency Name		☐ Anonymous
				Search
				Add Another Caller

When adding a caller, you first need to see whether they have an existing record in the system. Enter the caller's name and/or Agency in the appropriate fields. Sometimes just typing in the first few letters of a name brings back more results.

Search results pop up in a pink menu (also called an Ajax menu). If the caller has a record, his or her name should appear in the results. When you click on the name, the caller's information

is automatically added to the **New Contacts** screen. **NOTE:** Ajax searches are disabled for users who have the JAWS Permission on their account.

When a caller doesn't appear in the pink Ajax menu, ensure they are not in the system by clicking the **Search** button at the far right.   Another option for ensuring they are not in the system, especially if one is unsure of the spelling, is to enter the phone number and click the Search button. Search results will appear in a list below the search fields.

If the individual doesn't have a record listed, click **Add New Record** and a blank overlay will appear. This is where you can enter the caller's contact information.

If the caller is already in GetCare, you can edit his/her record by clicking on the **Edit** link. You can also click **Remove Caller** link if you have selected the wrong record.

New or Existing Consumer Contacts

After adding the caller, add the consumer. (If the caller is the consumer, you will not add a caller, just a consumer). To add a consumer, you first need to see whether they have and existing record in the system. This prevents the addition of duplicate records. To search for a consumer, enter their last name and first name. As with the caller search, entering just a few letters of the consumer's name may yield more results. You may also enter the consumer's phone number, address, ID number, SSN and/or DOB in the appropriate fields. Search results will pop up in a pink Ajax menu. If the consumer's name appears in the results, click on it.

If the consumer's name doesn't appear in the Ajax menu, ensure they do not have an existing record by clicking the Search button at the far right.

Existing Consumer Contacts

If the consumer has a record in the system, their name will appear in a separate section below the search fields

Last, First Name	Nickname	Phone	Client ID	Last 4 of SSN	Date of Birth	Email
Test Rb, Test	test	(555)555-5555 x5555(Home Phone)	#85899	SSN:	01/01/1945	marvie@rtzassociates.com

|<< 1-1 >>|

Click on the consumer's name. The consumer's contact information automatically populates the consumer section as displayed below.

The consumer's record contains several subsections. First is the consumer's identification and demographics. Next is the Contact History. Here you can see a list of the consumer's previous calls and who talked to them.

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If you click on the arrow on the right hand side of the contact you would like to view, you will be able to view the agency, listing name, what was searched for and how the consumer/caller was referred.

You can click on the listing name and bring up a section with the listing information. Third is a list of any caregiver/care receiver relationships. Last is a summary of service enrollments. If you would like to edit the identification and demographics section, including adding to the Presenting Situation (Intake Summary), click on Edit in the upper right hand corner. After any edits, remember to click Save. You can also view Follow-ups and Notes in this section.

If you would like to hide any of the subsections, click on the white arrow on the right hand side of the column to collapse it.

Adding a New Consumer Record

If the consumer does not have an existing record, click **Add New Record** to create a new record.

An "Add New Consumer" overlay pops up. On the overlay, enter the consumer's contact information. You will need to select one of the three SSN fields (SSN, No SSN Provided, Last 4 of SSN Only), and Region, in order to move beyond the SSN fields.

If consumers exist in the system with similar names, a **possible duplicates list** will be displayed for you to look through and make sure that your consumer does not already exist in the system. The possible duplicates search uses four sets of criteria:

Last Name, First Name, DOB, Gender
Last Name, First Name, SSN
Last Name, First Name, Phone Number
Last Name, First Name, Email

If any of those searches comes across consumers with matching information, those consumers will show in the possible duplicates search and will have the matching information highlighted in red.

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NOTE: If a field has been forgotten or improperly filled out it, there will be a validation that alerts the user.

When adding a new client, you will be required to enter in enough information to trigger one of the four duplicate search criteria. If you do not trigger the duplicate search criteria, you will receive a validation in the system, and the new contact can be saved.

NOTE: If you do not have the information necessary to pass the validation, then the client would be considered anonymous.

You must click **Save** in order to save the consumer's information. After you click the **Save** button, the window will close, and the information you've entered will automatically appear in the **New Contact** page.

Because you have just created a new record for this consumer, you will not be able to expand the contact history section

If you ever want to edit the record of an existing consumer (for example, you notice an error in the address), click on the **Edit** button. This will allow you to edit the identification and demographic information. If you need to edit the Name, DOB or SSN, you can do so by clicking on the **Edit** link on the bottom left of the top identification section of the consumer record.

Likewise, if you ever click on a consumer record in the search results, then realize that you have selected the wrong record, click on the **New Search** button in order to open and search for a different record. To remove the unwanted consumer record, click the **X** in the upper left hand corner of the consumer section, next to the consumer's name.

Adding Another Caller

If there is more than one caller on the call, you can add another caller. To add an additional caller, click on the **Add Another Caller** link, in the bottom right hand corner of the Caller section.

Once you have clicked on add another caller, you will be able to search for an additional caller by name, phone number, or agency name. You will also have the option of adding an anonymous caller if necessary. This search is performed the same way as adding the primary

caller. After adding the caller, you can edit the information by clicking on the edit link next to the caller's name you would like to edit. You can also choose to remove a caller if you have incorrectly added the caller.

Adding Another Consumer

Sometimes, an individual may call you and want to ask about services for more than one person. For example, an adult son may call to seek referrals for his mother and father. In these cases, you can click on the **Add Another Consumer** button to add more than one consumer record to the call.

You can click add another consumer at any point in the call – i.e., you can add several consumers before searching for referrals for any of them, or you can make a full call record for one consumer before adding any additional consumers.

Search for the consumer by name, nickname, phone number, address, GetCare ID, Last 4 of SSN or Date of Birth.

If the consumer record exists in the system, simply select the appropriate name from the list.

If you don't see the consumer's name in the system, click the **Add New Record** link.

If you click on the **Jump to Client File** link then you will be taken to that client's record with in the CLC SET module to conduct pre-screening, screening, and access assessment tools.

Anonymous Consumer Contacts

Consumers that appear anonymous or only provide a first name:
Instead of initially clicking anonymous, first respond to the individual's request for information or assistance., As the individual becomes more comfortable and engaged in the interaction, there may be opportunities to gather information such as first and last name, address, phone number and other data. This data can be entered and followed-up on through the I&A contact form.

If only a first name can be obtained, or a first name and phone number (e.g.) the consumer will be coded as anonymous. You can still do follow-up. You are not creating a client file.
To not be anonymous, you need to meet one of the four duplicate search criteria (see above).

When Anonymous is selected from the Consumer field, you will have an empty section that is similar to the named consumer section, other than the contact history field that is in the first section when anonymous is selected. Use the contact history field to denote whether this is the consumer's first contact this year or if they have contacted the agency previously during the current fiscal year.

Enter the consumer's demographic information, if appropriate (see below for more information about these fields).

Entering Demographic Information

The GetCare New Contact Page allows you to capture a broad set of demographic information about consumers. While completing all demographic fields is not required for NAPIS, they ARE required for federal CLC (ADRC/NWD) reporting. These fields 1) refine searches to better match services to consumer needs; 2) allow your organization to track which groups most use CLC I&A services and which are not contacting you but could benefit. Gathering additional demographic provides data to the state and to your agency about how our work delays and/or reduces the need for costlier services or higher levels of care. NAPIS required demographic fields are indicated with a red asterisk (*).

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For a new consumer, use the drop-down menus to enter demographic information. The age fills in automatically if you have entered the birth date. Enter presenting situation, then click on the **Save** button.

If it is an existing consumer, the information entered previously will automatically appear in the appropriate field. If any information needs to be changed, use the drop-down menus to edit the demographic information then click on the **Save** button.

Searching for Services

The New Contact page allows you to search for services by a number of different criteria. Generally, the most important value to enter in one of the search fields is a service area. Doing this will help you find services near the consumer.

Service listings are held in a database called the Resource Directory. The Resource Directory is maintained by Resource Directory Specialists in each Planning and Service Area (PSA). CLC-GetCare users can contact their agency's Resource Directory Specialist to learn more about the taxonomy and the directory if they are unfamiliar with it or want to increase their knowledge.

If service listings are not entered into the Listing Manager, they will not show up in the search results and the resource directory specialist should be informed. Resource Directory Specialists also need to ensure they provide information on where the service is provided, so that when "in the community" is chosen from the dropdown list, the agency/site location map displays.

There are four options for searching from this initial display.

Need: This is a dropdown list of needs that have one or more active listings attached to them within the system. The need filter is helpful if you know your listing is associated with a need but aren't sure how to spell the listing.

Program Type: The program type filter is a dynamic filter. If there is a need selected in the need filter, then the program type pull down will only show the program types associated with that need. This will help further limit the number of search results.

Service Area: This menu will allow you to search by a county, multiple counties, or state/nation-wide.

Quick Search: This is a free text search where you can enter a word or phrase in order to find matching services. Examples of keywords include "meals," "dressing assistance" or "dementia." You can also search by consumer value, active taxonomy terms, program type name, A.K.A of an agency, A.K.A of a listing, listing's program type synonyms, AIRS Code, listing name, and agency name. When you click on the **Search** button, the system will search for all services related to that keyword in the need, program type, or service area you specified.

Once you have entered information in one or more of these fields and indicated a service area, click **Search.**

More Search Options

In addition to these fields at the basic search level, the New Contact Page also offers a set of more refined search fields. To see these, click on the Advanced Search link located to the right, above the Search button.

Doing so will open a section with additional search options.

Note: You do not need to fill out all of the fields in this section – in fact, its better if you only fill out those that are strictly relevant to your search. Because this search looks for services that match all the criteria you enter, entering criteria that are too detailed may result in a failure to find matching services.

Language: This list will allow you to search for services whose staff speak languages other than English.
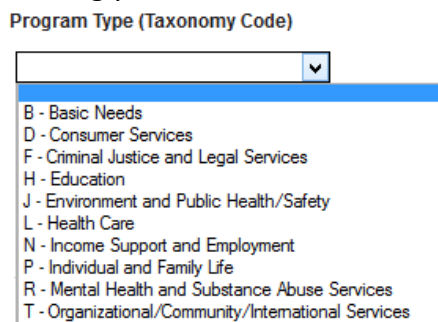
Special Focus: Refine your search by looking for a specific group (of consumers) for whom the service is intended.

Payment Type: If the consumer wants to find services that accept a specific type of payment (e.g., Medicare or Medicaid); you can search for that criterion here.
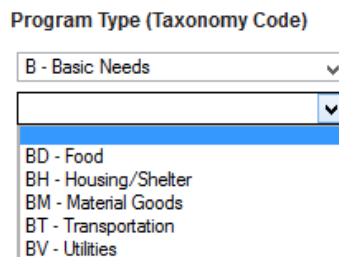
Program Type/Taxonomy Code: Like the Category/Taxonomy Term search in the section above, this search allows you to find services related to the AIRS taxonomy. Here, you can use a drill-down method in order to search for taxonomy terms that are active within the Washington ADRC.

Age: Enter an age in order to locate services that serve a particular age group.
To select multiple entries in the menus that allow them, hold down the "Ctrl (PC) or "Cmd" ⌘ (Mac) key while clicking your selections.

Once you've finished selecting your search terms, click the Search button.

Program Type (Taxonomy Code)

⌄

B - Basic Needs
D - Consumer Services
F - Criminal Justice and Legal Services
H - Education
J - Environment and Public Health/Safety
L - Health Care
N - Income Support and Employment
P - Individual and Family Life
R - Mental Health and Substance Abuse Services
T - Organizational/Community/International Services

In order to find a specific taxonomy term, click on the first-level grouping in this menu – e.g. B-Basic Needs.

Program Type (Taxonomy Code)

B - Basic Needs ⌄

⌄

BD - Food
BH - Housing/Shelter
BM - Material Goods
BT - Transportation
BV - Utilities

When you click on the field again, you see that the options have changed to display the second level of the taxonomy. Continue clicking through the levels in order to reach the specific taxonomy code you want.

Search Results

After you have entered your criteria and clicked **Search**, the results screen will display a list of all the services that meet your criteria.

Summary information about each service will appear, including listing name, parent organization/agency, and phone number. Hovering over a listing name will provide summary information including the description of the listing and the hours of operation.

In order to see a full page of information about a service, click on the service's name. You will see the listing preview page for that service (as shown above). Click on the **map it** link next to the service in order to see the location of that service.

To **compare** key information about any services, check off the box to the left of the services you want to compare.

Click on the **Compare** button at the bottom of the results section.

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You will see a column for each of the services you selected that contains basic information about the service (if the fields being compared have not been filled out for these services, there will be no data showing in that field for that listing.
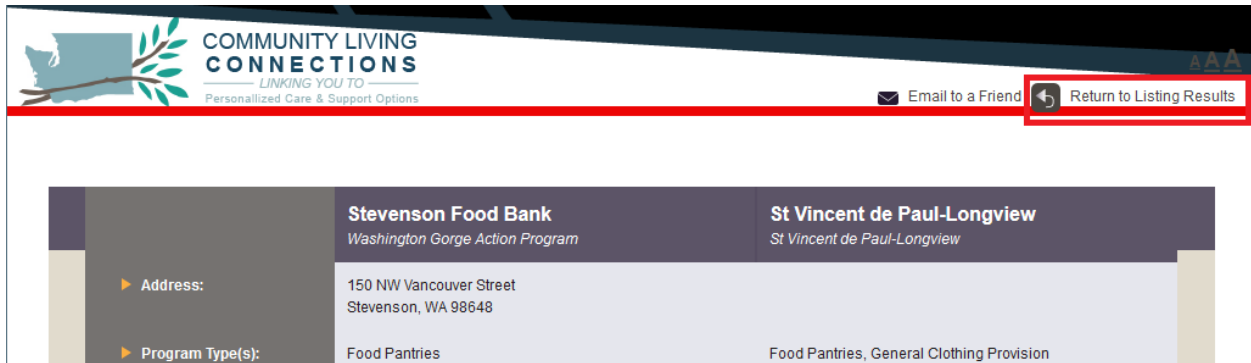
Click the **Return to Listing Results** link to go back to the results page.

The checkboxes in the right column of the results page allow you to record if you provide information (Info) and/or how you are referring the consumer. You can select as many options for **Refer by** as are used for that call.

Select **Info** if you are giving them information about the service, without actually referring them to the service.

Select **Phone** if you have given the consumer the information about the service over the phone.

If you choose **Mail**, you can click on the listing name and then print the details of that listing to mail to the consumer or caller.

Select **In Person** if you are handing the information to the consumer/ caller in person.

Select **Email** if you are e-mailing the consumer the information (this option will only display if the consumer or caller's record contains an e-mail address).

Select **E-Refer** if you would like to electronically refer a consumer to a listing. If E-Refer is selected, then a notification will be sent to the E-Refer agent for that listing so that they can follow up with the consumer. The E-refer agent must be a licensed CLC system user.

Check the appropriate box to indicate your method of referral, and then click on the **Save.**

Once you have clicked on this button, you will see that the number of services to which you have referred the consumer is recorded in the upper right hand corner.

NOTE: it is very important that you click the **Save** button before leaving this section. If you do not, the referrals you have selected will not save.

If you want to search again (for additional services, or if your first search was in error), click on the **New Search** link. You will see the search terms you entered for the results you saw. If you want to do another search, simply enter the new values in the fields and click **Search**.
Once you've saved your referrals, you have two options for navigating away from this page.

If you want to add more information to the call (e.g. record more information about the consumer, or create a note to yourself to follow up), you can scroll to the other section that you would like to work on.

After you have saved the referrals you will see that there are two new fields that have come up. One is the **consumer need** and the **program type**. These will default to the need and program type associated with that listing. If there are no default values selected, then those fields would be blank. The needs and program types that are chosen in these fields will populate the Needs Summary Report and Needs Detail Report.

There will also be an X to the left of the listing name that will allow you to remove that referral from the call.

Scheduling a Follow-up

If a follow up is desired, you may use the Follow up/Notes section and add a follow up. Select Yes from Do you want to follow up.

When you do so, you will see an Assign To field appear.

Enter the date you want to call the person back in the Proposed Date fields.

You can also enter a note attached to the follow-up in the Notes field. (If you're not scheduling a follow-up, you can still enter a note on the call in this field; it will appear in the Notes section). You can also change the date of the note by changing the date in the upper right hand corner of

the follow-up/notes section by clicking on the date field and selecting a new date by using the date selector picker or manually typing in the date.

The Name field will populate with all named consumers and callers within the call. You can select one or multiple options from this field. You must select at least one in order to save the follow up.

The Assigned Staff field contains a list of all the case managers at your agency. You will see your name when the list first appears, so if you just want to set up a follow-up for yourself, you don't need to take any additional action in this field. However, if you want to have someone else follow up with the consumer, you can select their name from the Assign to drop down, and the follow-up you've scheduled will appear in that person's list of follow-ups.
If you choose No from Do you want to follow-up there will be a Reason field that appears allowing you to add a reason that you do not want there to be a follow up. Notes that have "No" selected for "Do you want to follow up" will be categorized as a note rather than a follow up.

General Note Section

The **General Note** section allows you to view the notes for the consumers in the system. Any notes that have the contact type of I&A will show in both the Client File Progress Notes section and in I&A when that consumer has been selected for a call.

Finishing the call

After you add in notes in the follow up/notes section there will be a field labeled Call Outcome. Selecting first and second tier call outcomes is required before saving and completing the call, otherwise important data will be missing from I&A reports.

First, select a first tier call outcome. Second tier options will then appear in the multi-select field to the right of the call outcome pull down. To select multiple options in this field, hold down the Cmd key on a mac and the CTRL key on a PC then select the options. A full list of Tier 1 and related Tier 2 call outcomes is below:

Information: CLC information, Specialized Caregiver Information
Medicaid Access Assistance: Pre-Screen Medicaid Programs, Application – LTSS, Application – Apple Health, Benefits Counseling, Public LTSS - Service Access Coaching, Individual Advocacy, Medicaid Service - Access Coordination, Referral for LTSS Assessment, Referral for DD Assessment
Non-Medicaid Access Assistance: Screen Non-Medicaid Programs, Benefits Counseling, Family Caregiver Access Assistance, Individual Advocacy, Private Pay LTSS - Service Access Coaching, Senior Drug Education (individual assistance), Referral for LTSS Assessment, Referral for DD Assessment, Referral for Other Type of Assessment, Referral to Community Services
Kinship Navigator: Legal Issues or Services, Children with Special Needs, Housing, Emergent Needs Funding/KCSP, Counseling Child, Counseling Relative, Health Care Child, Health Care Relative, Oral Health Child, Oral Health Relative, Substance Abuse, Financial Assistance, Educational Advocacy, Children with Military Parents Deployed, Children with Incarcerated Parents, Respite Services/Childcare, Caregiver Support/Support Groups, Other Needs
MIPPA: General Information and Referral, Problem Solving, Detail Assistance

Finally, decide if you would like to mark the call as **incomplete**, **save and complete** the call, **save** the call, or **cancel** the call. **Note:** a call must be marked as **Complete** in order that it to be counted in **I&A reports**.

If you select **Incomplete Call** you will save the call but be allowed to re-enter and edit the call information via the follow-up and stats module.

If you select **Save** you will save the information so that you can return to it later.

If you select **Save and Complete**, you will not be able to re-edit the consumer and caller information for the call.

If you select **Cancel** the information will not be saved, and the page will be cleared.

Call Outcome	Information	⌄	CLC Information Specialized Caregiver Information

[Incomplete Call] [Save] [Save & Complete] [Cancel]

Follow-Up & Stats Page:

On the I&A drop-down menu, select "Follow up and Stats". This page is a record of past calls (contacts) in descending date order. You can use the filters at the top to search for a specific call, if needed.

This tab will by default display all calls; however, using the Agency and Agent filters, you can see just the calls for your agency or for a specific agent.

In the **Type** menu, you can specify that you want to see only complete or incomplete calls; and the open follow-ups or closed ones.

The **Caller Type** filter will allow you to select either the consumer or the non-consumer and search on their name.

The **Call ID** filter will pull up just the one ID and will ignore all of the filters that are currently selected.

Finally, the **Date Range** fields will default to showing calls for the past month. If you want to see calls from farther back, you can enter new date values in these fields. Once you've finished entering your search criteria, click Search.

Clicking on a consumer name in the search results will do one of two things, depending on the call type:

1. If the call is Incomplete, clicking on the consumer's name will reopen the call.

2. If the call is Complete, clicking on the consumer's name will bring up a summary screen of information about the call.

When the call opens back up you can edit information about the referrals, add new referrals, add new notes and complete follow ups.

Adding Referrals to a completed call

If you would like to add additional referrals to the call after it is marked as complete, you can do so by opening the call from the follow up and status page and scrolling to the information and assistance section. From here you can search for listings for referral just like you would if you were adding a new call. After the listing results you searched for have been brought up, select how the consumer is going to be referred to the listing and then save the section.

Searching for Open Calls for follow up

On the I&A drop-down menu, select "Follow up and Stats"
Select date range
Select "All Types of Calls"
Select "Proposed Follow Up" from "Any Follow-Up" drop down box
Select staff name from "Follow Up Assigned to" drop down box
Click "Search" button and a list of follow up calls will appear

Checking Existing Follow-Ups

To look at the list of Open Follow-Ups, scroll to the general notes section.

General Note							
Date	Encounter Date	Type	Contact Type	Author	Proposed Follow-up	Assigned To	Note
05/11/2015	05/11/2015	Proposed Follow-up	I&R	Galipeau, Angela	05/13/2015	Galipeau, Angela	Please follow up with this consumer in 2 days.

Closing Follow-Up Calls

Do not create a New Contact to close an Open Call with a Follow-Up. Open calls for follow up will remain open unless the underlined original record that created the follow up date is found, opened, and Follow Up notes are added. Note: Do not close follow up calls from Dashboard records.

Steps to close a Follow-Up Call:
After completing steps a. – e. above under "Searching for Open Calls for follow up," click on the active link of original record desired for follow up
In the "Follow-Up/Notes" section, box indicated "Type of Note", select "Follow-Up" and type in a brief note.
In the "Call Status" box select "Reached"
In the "Follow-Up Status", select "Resolved"
Fill in "Date Reached"
Click "Save Follow-Up Call" in the Follow-Up section
Click "Save" at the bottom of the record

Once you have added the note, it will appear in the **General Notes** section of the call.

Adding Additional Notes or Follow-Ups to a completed call

If you would like to add additional notes to a completed call, click on the consumer's name to open the call. From here you can scroll to the Follow-Up/Notes section, select the type of note and the name of the consumer or caller, type in the note, and fill out the rest of the section. Once you are done with the note click **Close Follow up Call** if it is a follow up, or **add new note** if it is a normal (non-follow up) note.

I&A Reports
List of available filters for I&A reports in the WA CLC-GetCare System:

From: Start Date for the report date range
To: End Date for the report date range
Agents: A list of agents assigned to a PSA. Users can select one or more to run reports for.
REI: Responsible Entity Identifier. Users can select one or more to run reports for.
Report Export Type: This lists the report output options. Some reports will only have one output option. Typical report output options include PDF or XLS. The Custom Export reports can also be exported to a CSV format file. A CSV file format would be used if the document had too

many rows to be exported in excel. There is no maximum limit for CSV files as far as the amount of data that can be exported.

Report Information by Catalog

The filters listed above are available on the reports in the following catalogs. As mentioned above, there are some filters that only show on certain reports. The filters work in combination with each other. This means that the options for certain filters will update depending on which options are chosen. The reports can be generated to the any of the available output options, unless the export option has a limit of how big the file can be. Excel can only handle so many rows. If you run a report that has more rows than excel allows, the system will give you a notification letting you know that is the case. When this happens you can either pare down the filters, or choose to export as a CSV. CSV files do not have a limit as to how big they can be. There are no "required" filters, although the fewer filters used to run reports, the longer reports will take to be generated.

Call List Report
Description: This report will list all calls logged during the date range selected for the agency/agents that were selected. It will give you information about the call such as the call ID, consumer, caller, agent, call date etc.
Important Notes: This report will come up blank if there are no calls that match the selected filters.

Call Summary Report
Description: This report will list all of the calls for the date range and agency/agent filtered for. It will give you totals for complete calls, incomplete calls, follow-ups, etc.
Important Notes: This report will come up blank if there are no calls that match the selected filters.

Consumer Demographics Summary Report
Description: This report will tabulate consumer demographics for the date range selected based on the I&A call data.
Important Notes: This report will come up blank if there are no calls that match the selected filters.

Follow-up Status Report
Description: Using this report you will be able to see the status of follow-ups during the date range filtered for.
Important Notes: This report will only show data for calls that had follow-ups logged in the call.

Referral Summary Report
Description: All of the referrals made during the date range selected will show on this report. It will show the total number of duplicated referrals along with the total number of unique (unduplicated) referrals.
Important Notes: This report will not show a referral for each call. It will only list the referrals that were tagged and then will have the number of referrals that were made for that listing.

Needs Summary Report

Description: The Needs Summary Report tracks needs selected during a call in the Information and Assistance section of a call.

Important Notes: The need and/or program type must be identified (selected) in the results section of Information and Assistance, not just in the filters section. Otherwise, this report will not show results.

Needs Detail Report

Description: This report will show any of the program types that were searched for and selected in the Information and Assistance section of a call. If a need is "Unmet" during a call, the user can select the unmet check box in the Information and Assistance section to identify the unmet need and/or program type. That data will also map to the report.

*Important Notes:* This report will only show results if calls have a need and/or program type identified.

There are two ways to access the above reports:

1. From the dashboard screen, look at the right side, click on the dropdown menu link titled **Reports** and then click on **Report Library**.
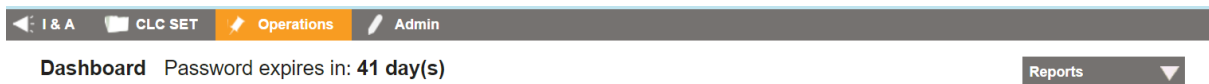
A menu of reports for various components of the system will emerge to the left of the screen. Click on **I&A Reports** for a list of available reports

2. From any screen, click on Operations, then hover your mouse over **Reporting**, then hover over **Reports**, and click.
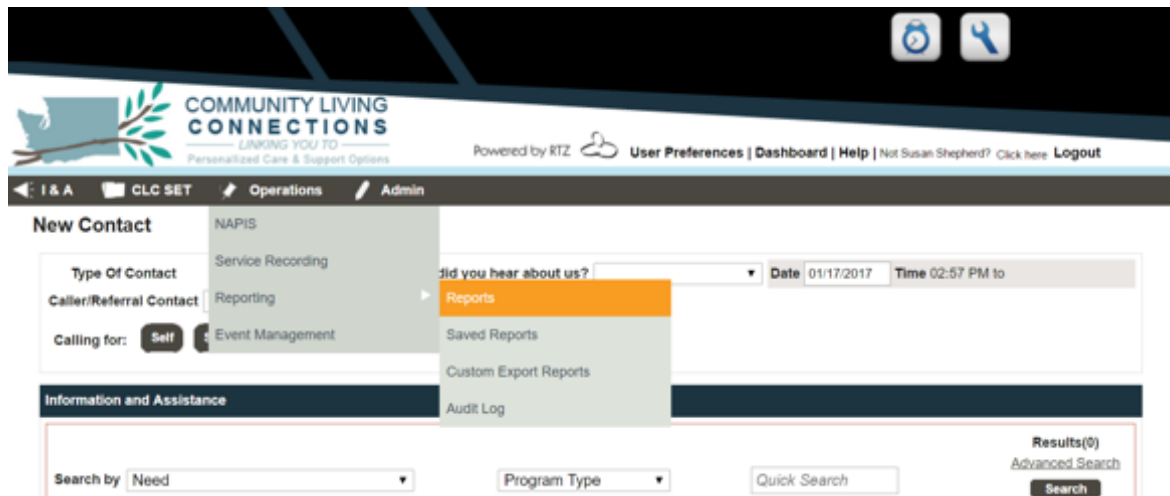
The same menu of reports for various components of the system will emerge to the left of the screen. Click on I&A Reports for a list of available reports.

Not for distribution beyond authorized users of the WA CLC system.