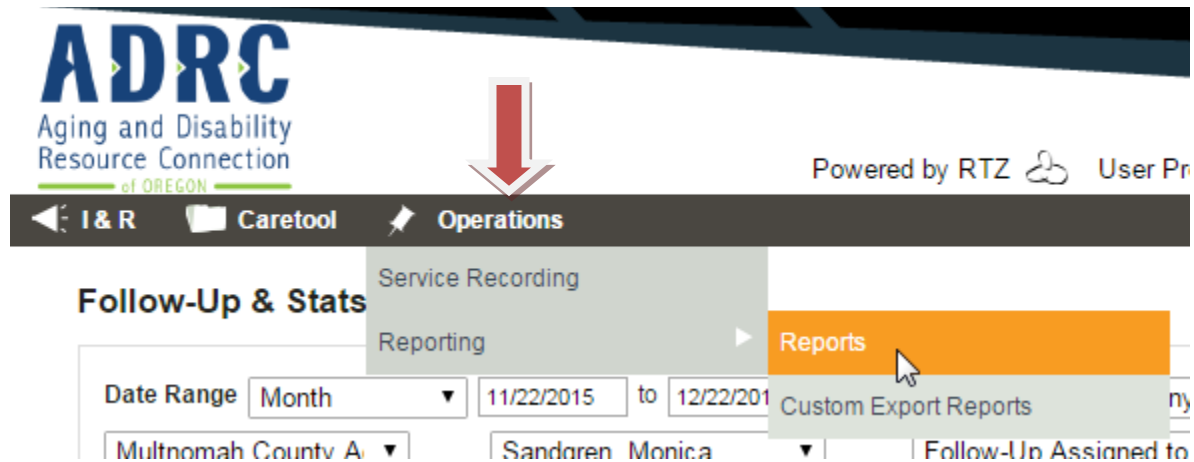


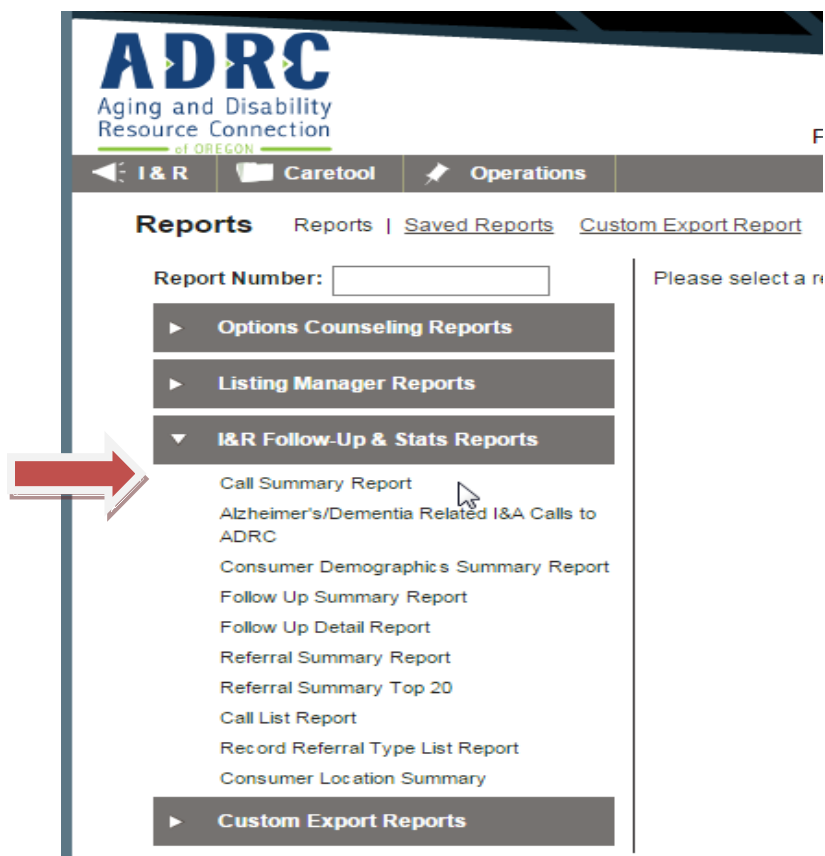
Go to Operations>

- Reporting
- Reports



Choose I&R Follow-Up & Stats Report

- Call Summary Report



- Enter Date, Choose Agency, (No selection necessary for Agent)
- Run Report

Call Summary Report () | [Sample](#)

Call Summary Report

☐ Use saved filters

Date

From To *

Population

Agency

Elders in Action
 Friendly House, Inc.
 Hollywood Senior Center
 Immigrant and Refugee Community Organization
 Impact Northwest
 Multnomah County Aging, Disability, and Veterans
 Neighborhood House
 Urban League of Portland
 Washington County Disability, Aging and Veterans
 YWCA of Greater Portland

Agent

Abraham, Mary
 Abraham, Nicki
 Abrams, Sandy
 Ajinga, Amber

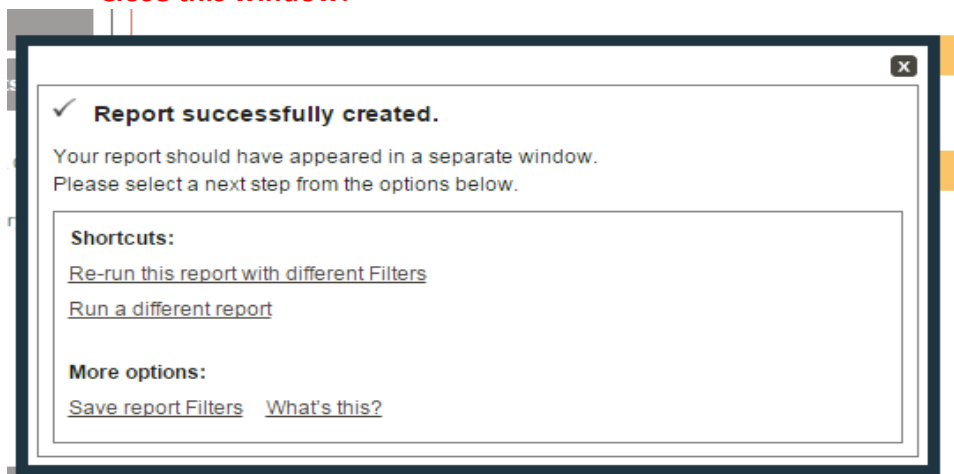
Report Export Type

☒ Pdf

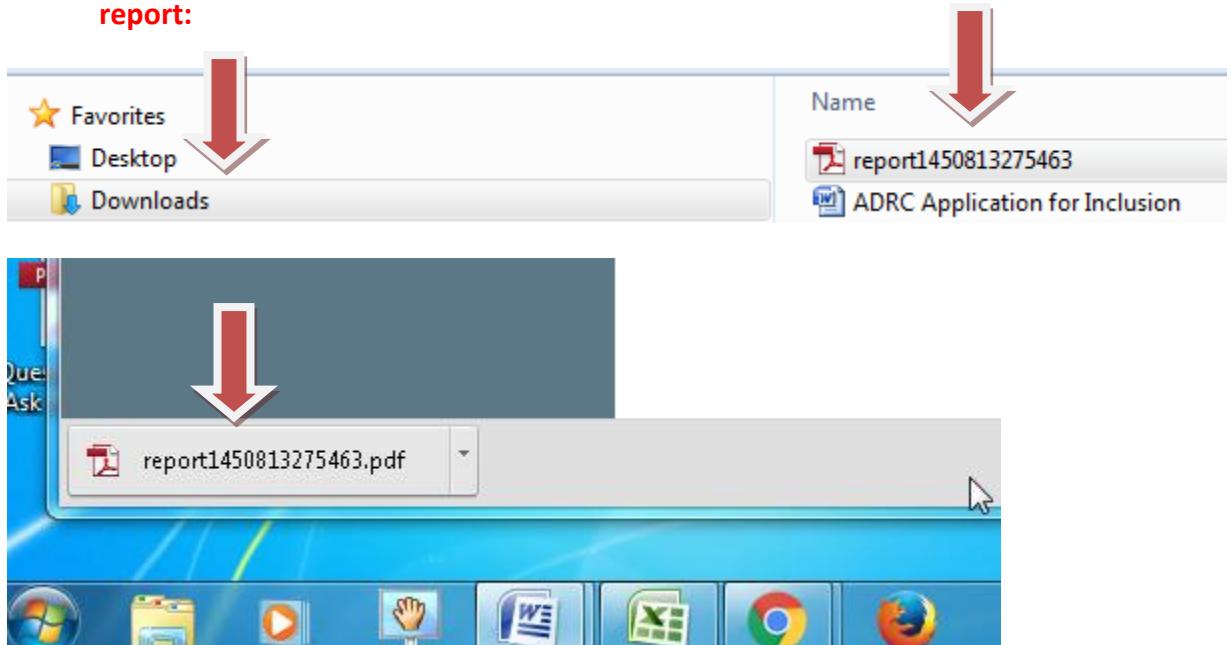
[Save current filter](#)

Save Report? ☐

- Close this window:



- Find report (PDF) in Downloads or in download tray on computer and open report:



- Scroll down the report to “Type of Call” for Total Assistance, Information or Referral:



Type of Call		
	Total	Percent
Assistance	545	15
Information	804	22
Referral	1889	51
Unspecified	455	12
Type of Referral		
	Total	
Medicaid	761	
Non-Public	264	
Options Counseling	105	
Other Public	665	





- **“Unspecified Calls”** are calls recorded without a Call Outcome. This could be a completed call or incomplete call.
- From Follow-up & Stats, you can find records without call outcomes. Click into the link under Name to access the call. Calls without call outcome should be corrected; rerun this report after corrections have been made

12/09/2015	01:16 PM	2975410	Test (Test), Add-Family	Complete Call, No Follow-Up
12/08/2015	01:08 PM	2972700	Test (Test), Add-Family	Incomplete Call, No Follow-Up
12/02/2015	08:46 AM	2958630	Sample, Test Information	Complete Call, Open Follow-Up

- Another method to identify Unspecified Calls (calls without call outcome) is by running a custom I&R report. Choose Call ID, Call Status, and Call Outcome. Select Date, Call Center, Call Specialist as applicable (you may choose multiple or leave blank for ALL).

Select Report Fields

▼ Call Info

☐ Select All

☒ Call ID

☐ Agency

☐ Caller type

☐ Branch

☐ Call date

☐ Contact method

☒ Call Status

☐ Unit

☐ Agent name

☐ Referred from source

☐ Send to OR Access

☐ Non-Traditional ADRC

▶ Caller

▶ Consumer Identification

▶ Consumer Demographics

▼ Call Actions

☐ Select All

☐ Number of referrals made

☐ Options Counseling Referral

☐ Non-Traditional ADRC Call

☒ Call Outcomes

- Filter by “Blanks” to identify call records missing call outcome:



A	B	C
Call ID ▾	Call Status ▾	Call Outcomes ▾
299558	Incomplete Call	
299538	Complete Call	