Client Tracking Database
Frequently Asked Questions

CONTACTS

***NOTE: Contacts and activities that have an outcome of "Administrative" will not be submitted to encounter reporting. It is important to document these activities to show the sequence of events and for quality customer service.**

Please do not select any other outcomes when you are selecting "Administrative" or "Attempted".

1. Q: A person calls about their parent, what is this contact considered?
   A: *This is a collateral contact and should be recorded in the database as the caller being the son/daughter and customer as the parent.*

2. Q: How many contacts are recorded when the ADRC Specialist speaks with two different people on a call and each person has needs and is requesting information pertinent to them?
   A: *This would be two separate contacts and two separate call records should be recorded, one for each customer.*

3. Q: When an ADRC Specialist makes a home visit, returns and submits an application by fax or by mail, how many contacts is this?
   A: *This is one contact. If the home visit and the fax occur in the same day, the entire note can recorded under the contact. However, if the fax is sent on a different date, another new call should be added indicating the date the fax was sent and the outcome should be administrative.*

4. Q: How many contacts are recorded if a customer calls twice in the same day and speaks to an ADRC Specialist each time?
   A: *This would be considered two contacts because information was collected and/or shared each call.*

5. Q: If the ADRC Specialist is meeting a family at a school what is the call type?
   A: *The call type is "Other".*

6. Q: How should a follow up contact be recorded when information is sent to a customer the same day it is requested?
   A: *This is considered one contact and all of the information can be listed as one note on the day it occurred. However, if the information is sent the following day, the call is recorded as a contact on the date it occurred and the date the information is sent is recorded on the following day with the outcome of administrative contact.*

7. Q: How is a contact recorded when information is sent to a person after an outreach or marketing event?
   A: *If there is a detailed conversation with the customer who is requesting further information would be recorded as one contact, in which the call type should be "Other". Sending information at a later date would be considered an administrative contact and recorded as the date it occurred.*

8. Q: The ADRC may still get anonymous callers, is this recorded?
   A: *Yes, continue to document when information is exchanged. As often as possible, it is encouraged to request a consumer's name, date of birth and gender. It is required to record these elements when selecting the outcome of Long Term Care Functional Screen.*

9. Q: Please provide an example of when it is acceptable not to ask for a person's name and date of birth?
   A: *If a person contacts the ADRC and asks for the phone number for the senior center, the ADRC should provide the information but it is not necessary to ask for the person's first name, last name or date of birth.*

10. Q: Please provide an example of when the caller type is "ADRC initiated collateral"?
A: *An example of this would be if the ADRC calls a clinic to follow up regarding information about a consumer. Another example may be when the ADRC is at a marketing event and staff provides information via a phone call or email at a later date to a family member, not the person considered as the customer.*

11. Q: In call topic "other", what may be recorded here?
A: *An example of this may be when the ADRC staff speaks to a person at a community outreach event, such as a health fair, school, etc.*

12. Q: Is it a contact when a customer contacts the ADRC requesting information?
A: *Yes, this is a contact because information is exchanged. The caller is calling the ADRC because they view the ADRC as a source of trustworthy information.*

13. Q: When an ADRC Specialist provides a home visit to a customer, then later calls the person with more information, is this two contacts?
A: *Yes, these are two separate events in which information was exchanged.*

14. Q: Should two contacts that happen in the same day, be recorded as one contact?
A: *No, only administrative or attempted calls that happen on the same day can be recorded together with separate notes for each attempt or administrative activity.*

15. Q: Are multiple emails in one day, one contact?
A: *No, emails are treated the same as calls. Each email exchange is a contact.*

16. Q: If multiple calls from the same person happen in the same day will SAMS be changed to auto-fill the information?
A: *No, at this time we cannot add that function to SAMS.*

17. Q: How do we handle a situation where somebody wants the phone number of a senior center and we don't know their name?
A: *The call would be entered into the database as an anonymous contact.*

18. Q: When you are seeing a husband and wife on a home visit, how do you not include personal information on the other person in the notes?
A: *The personal information for each should only go in his/her own record.*

19. Q: If a hospital calls about a consumer but does not provide a name, is it entered by the provider name or anonymous?
A: *The caller should be listed as the hospital and the consumer is listed as anonymous consumer. Be sure to indicate the caller type as "Agency, Service Provider".*

20. Q: If a provider/agency calls the ADRC for information is the provider/agency listed as the consumer and agency?
A: *Yes*

21. Q: If an agency contacts the ADRC for an ADRC resource guide and requests 50 copies, would that be entered as one contact or 50 contacts?
A: *One contact. The agency is the consumer.*

22. Q: A call comes to the ADRC from a supportive homecare agency wanting information about assisted living providers, is this considered a contact?
A: *Yes, this is a contact and information was exchanged. Since the information is not being requested for a specific consumer, the agency is listed as the caller and the customer, the caller type is "Agency, Service Provider" and the outcome selected is "Community Partner".*

23. Q: A customer who is enrolled in a LTC program contacts the ADRC to ask for information about a service or Medicare Part D, how is this recorded?
A: *The ADRC Specialist should redirect the customer to the program/care manager they work with to assist them. The ADRC Specialist can also contact the MCO/ICA to let them know the customer is seeking further information. Each of these conversations is recorded as a contact. The outcome would be "Information and Assistance" the topic selected would be what information was requested.*

24. Q: An MCO member (or IRIS enrollee) contacts the ADRC complaining about a service or provider. How is this documented by the ADRC?
A: *This is a contact. The outcome should be "Complaint/Advocacy" and the topic should be "Complaint (other)"*

25. Q: If a person calls the ADRC to talk about elder abuse, which they may be the victim of, and they want to remain anonymous is that is ok?
A: *Yes. An ADRC should ask a customer for their information but if a customer is not willing to share it, they may remain anonymous and still receive assistance from an ADRC.*

26. Q: If an ADRC receives a call about someone who is under age 17, what age group should be recorded?
A: *Please use the age group 17-21.*

27. Q: How should the disability type be captured for individuals with a brain injury and dementia?
A: *ADRCs should continue to identify the disability type as they have been prior to January 2016.*

28. Q: The training materials indicate call types of phone, incoming and outgoing. Which should I select if a customer is calling the ADRC, phone or incoming?
A: *The call type of phone has been removed. In this scenario, the ADRC Specialist would select "incoming" as the call type.*

29. Q: If I call a physician to gain additional information for the functional screen is this a contact?
A: *Yes, exchanging information.*

30. Q: What goes in the "caller field", the person who called or the person they are calling about?
A: *The caller is the person who is contacting the ADRC, the consumer is who the call is concerning. If the consumer calls themselves, their name would be in both the caller and consumer fields.*

31. Q: If a referral is made to the ADRC from a SW or discharge planner or another agency to contact a consumer is that a contact?
A: *Yes, this is considered a contact. There is another contact when the consumer is contacted directly by the ADRC.*

32. Q: If a customer is calling only for a phone number to another organization would this need to be captured as a contact? Currently our support staff receives quite a few calls from individuals simply asking for a phone number.
A: *Yes. If a person is calling the ADRC and receiving assistance it should be recorded as a contact. It would be understandable if an ADRC does not request a person's name and other demographics when an individual is simply calling for a phone number or the hours of the meal site. Therefore it would be appropriate to record this contact as anonymous.*

33. Q: If an email is received on one day and the ADRC staff replies the next day, should one or two contacts be recorded? If not, how do you track a received e-mail on day one and your response on day two?
A: *This would be treated as one call/contact, and the contact date should be recorded on the date when the ADRC responds. The notes can reflect the date the original email was received.*

34. Q: If a referral is made to the ADRC from an agency or other interested party to contact a consumer what should be recorded as the outcome?

A: *The caller is the agency or person making the referral, the customer is the person they are calling about and the outcome is Information and Assistance. (There has been thought that this should be "Referral to ADRC". Please do not use "Referral to ADRC" unless a referral is made to or received from another ADRC or to/from a TADRS. DHS will be referring to this data to determine the amount of referrals made between ADRCs/TADRS therefore this outcome should only be used for this activity.)*

35. Q: When recording a contact in which something is being mailed out through USPS, what is the call type?
A: *The call type should be email/electronic because it is most closely aligned to an email. Most likely the outcome in these situations is "Administrative" because staff are following up from a previous contact, or sending information to IM, a doctor, etc.*

36. Q: If a caregiver is calling the ADRC for resources, should they be considered both the caller and the customer?
A: *It depends on the nature of the call. If the caregiver is calling for information specifically for the person they are caring for, then the customer is the care recipient. However, if they are calling for resources for themselves as the caretaker, e.g. support groups, then they would be both the caller and customer.*

37. Q: How do I select outcomes under call topics? (SAMS IR Users) (This is in the user guide).
A: *There is no need to select outcomes under call topics and that is why it is not accessible. Outcomes are only documented under activity outcomes – not call topics.*

38. Q: Which "Call Type" should be used for written correspondence (non-electronic)?
A: *It is preferable to maintain incoming and outgoing for phone calls only. Therefore for written correspondence, please use the call type as email/electronic as it is most closely aligns with an email, as it is another type of written correspondence.*

39. Q: Sara receives our MDS-Qs via PPS. When she receives one, she reviews the information, looks the person up in SAMS to check for recent involvement, documents receipt of MDS-Q in SAMS, and emails Kari (CLS) the referral. She has logged this in SAMS as Administrative but is concerned that it will 'cancel out' the MDS-Q that she uses as a topic since Admin calls are not sent to the state. Her question is can MDS-Q data still be pulled by the state if the call is entered as Admin? Or should she be using I&A in order to make sure our MDS-Q data is accurate?
A: *The topics will not be cancelled out when administrative is chosen and it should be chosen as they are doing. You are right that we will not receive this data through encounter when admin is chosen. However, at least the first visit and contacts will be recorded as MDS Q when the outcome is I&A. If we want the additional detail of the paperwork/admin work, we will need to run a report at each ADRC, which is possible with SAMS.*

40. Q: How is an ADRC staff meeting recorded?
A: *ADRC staff meetings should not be recorded in the Client tracking database. Staff should still record their time for time reporting purposes but there is not likely a reason to enter a consumer related note/contact.*

41. Q: How do I record talking with another ADRC staff member about a non-customer specific information, i.e. Medicaid, Medicare, etc.?
A: *Meeting with another staff member regarding non-customer specific information would not be reported in the Client tracking database, however time is captured for time reporting.*

42. Q: When should the ADRC Outcome: Enrollment Counseling be selected?
A: *This would include any time you are talking to an individual about enrolling in a LTC program. I would expect this would start with the initial call and include time during a home visit and possibly other contacts. Remember you can select more than one outcome so if you meet with a person and discuss enrolling but also work on the LTC FS, you can choose both ADRC Outcomes.*

43. Q: If staff are consulting with co-workers within the ADRC on a call/consumer, is this a contact that should be entered? What about staff consulting with supervisor on a case? What about staff and/or supervisor consulting with APS supervisor?
A: *These contacts do not need to be entered. However if staff /management want a contact to be noted in SAMS, to explain why a decision or action was taken, it can be added. If the contact is added, the outcome should be "Administrative".*

OUTREACH/MARKETING

1. Q: How should outreach and marketing activities be recorded?
A: *Outreach and marketing activities are recorded with the outcome "Outreach/Marketing. If "Outreach/Marketing" is selected, no other ADRC Outcome should be selected. When selecting the outcome "Outreach/Marketing", date of birth, age group, gender, ethnicity/race, and disability type must remain blank as these elements refer to an individual not an agency/provider.* ***The same event performed by more than one staff person should only be recorded once to represent a single event.***

2. Q: As part of an ADRC outreach campaign, when contacting or visiting a low-income apartment complex how would this be recorded?
A: *When doing outreach for the ADRC, the, you would outcome Outreach/Marketing should be selected. No other ADRC Outcome should be selected. Date of birth, age group, gender, ethnicity/race, and disability type must remain blank as these elements refer to an individual not an agency/provider*.

3. Q: How is a contact recorded when information is sent to a person after an outreach or marketing event?
A: *If there is a detailed conversation with the customer who is requesting further information would be recorded as one contact, in which the call type should be "Other". Sending information at a later date would be considered an administrative contact and recorded as the date it occurred.*

VOICEMAILS

1. Q: What if I get a voicemail message, is that a contact?
A: *No, but when you call the consumer back and talk with him/her this is considered a contact.*

2. Q: If an ADRC Specialist calls a customer and leaves a detailed message can this count as a contact?
A: *Yes, as long as you provide details in your message, if the ADRC Specialist just asks the customer to return the call then it would be recorded as an "Attempted Contact".*

3. Q: One way information – the customer called the ADRC and the ADRC Specialist calls back with information.
A: *This is a contact you either spoke with the person or left detailed information.*

4. Q: If a voicemail is left by a caller and we call back and reach the person, is that a contact?
A: *Yes.*

5. Q: How do I record checking emails or phone messages?
A: *If the emails/phone messages are about a consumer or are general questions from a community service provider, these should be captured with a note in the Client tracking database upon returning the call/email and providing information. The time it takes to read/listen, respond and type the case note should all be captured in time reporting. If the email or phone messages are not related to a person, then time is counted for time reporting but a note is not recorded.*

6. Q: What if I get a voicemail message, is that a contact?
A: *No, but when you call the consumer back and talk with him/her this is considered a contact.*

ADMINISTRATIVE

***NOTE: Contacts and activities that have an outcome of "Administrative" will not be submitted to encounter reporting. It is important to document these activities to show the sequence of events and for quality customer service.**

Please do not select any other outcomes when you are selecting "Administrative" or "Attempted".

1. Q: If a customer wants to be certified for food share and the ADRC Specialist needs to fax information to the IM worker, what kind of contact is this?

A: *The initial conversation is a contact. When the information is faxed, it is an administrative contact. If the ADRC Specialist has a conversation with the IM worker regarding questions about eligibility, cost share, etc., this would then be considered another contact.*

2. Q: Is it a contact if the ADRC Specialist transfers the screen to another ADRC for a customer?
A: *No. If ADRC Specialist only transfers the screen, this is administrative. However, if there was a call or a series of emails regarding the request to transfer the screen and information about the customer, the conversation would be considered a contact.*

3. Q: How would an ADRC record a situation where a MA application is returned for someone to go on a waiting list?
A: *The receipt and forwarding of the application to IM is considered an administrative contact. If verifications or other conversations occur about the application, with the customer or IM, these contacts would be considered collateral.*

4. Q: If a consumer emails the ADRC and requests information and the ADRC emails the consumer back, is that 1 contact or 2?
A: *This is one contact where information was exchanged.*

5. Q: If an ADRC staff requests medical information for a Functional Screen the day after a home visit, how would the contact be entered?
A: *If the request is made the next day, it is Administrative on the actual date of the occurrence.*

6. Q: Is it a contact when the ADRC Specialist speaks with the screen lead within the ADRC to determine how to accurately complete part of the Long Term Care Functional Screen?
A: *No, this is considered technical assistance and should not be recorded as a contact. If the ADRC Specialist wants to capture the information in the database, the contact should be considered as administrative.*

7. Q: If the ADRC Specialist talks with another ADRC or Aging staff member (including DBS, EBS, Nutrition, Caregiver Coordinator, Prevention Coordinator, etc.) for information for or about a customer, how are these recorded?
A: *These are types of conversations are considered technical assistance and do not need to be recorded. If there is information that is helpful to the call record, it can be recorded as an administrative contact.*

8. Q: If you are faxing enrollment forms to five individuals (MCO, consortium, etc.) would that be five administrative contacts?
A: *No, it is part of the enrollment counseling process. It is the continuation of work needed to complete the enrollment following the home visit (the contact) and would be listed in the contact in the notes section that you faxed information the same day as the home visit. However, if you fax papers the day after the contact, then it should be listed separately and the outcome selected would be "Administrative".*

9. Q: If the MCO calls to request the ADRC to transfer a functional screen is this recorded as a contact?
A: *No, it should be recorded as "Administrative".*

10. Q: What if we take an initial call and the consumer wants a housing list and we mail the housing list the same day, how is that counted?
A: *Record the call as a contact and list in the notes section that you mailed the housing list. However, if you mail it the following day, you need to enter it separately as an administrative contact because it occurred on a different date.*

11. Q: To clarify, if the ADRC mails information it is administrative, right?
A: *Yes if the mailing is completed on a day different than the contact. If you mail on the same day as the contact, you may enter it all as one note as part of the contact.*

12. Q: Is sending a list and writing a letter the same thing or is there a difference?
A: *Yes, both are following up with the contact and are considered administrative.*

13. Q: If an ADRC Specialist does a late home visit or appointment for enrollment counseling and faxes the enrollment form the next day, how is that entered?
    A: *Two separate dates. The first is a contact on the date it occurred. The second, when the enrollment form was faxed is recorded as "Administrative" on the date it was actually faxed.*

14. Q: How does an ADRC record a disenrollment due to death?
    A: *If this is entered in the Database, a note would be created but the ADRC Outcome is Administrative since there was no exchange of information for the benefit of the customer, it is just to make a note for the ADRCs knowledge.*

15. Q: When faxing an enrollment packet to an MCO, and they confirm that they've received it – is this administrative or a collateral contact?
    A: *This should be recorded with the outcome "administrative", however if the MCO/IRIS/IM calls or emails to ask for clarification or further information, this should be recorded as contact, likely with the outcome "Provided assistance with Medicaid Application Process" or "Information and Assistance" and the topic would be "Public Benefits-LTC programs".*

Additional Question

16. **Q: When we are working on an MA Application with a client, there are times that we need to ask for the 30 day deadline to be extended. When requesting that extension through the ES worker what ADRC outcome should be used?**
    A: *The ADRC Outcome is Administrative should be used when recording this information since there was no exchange of information but the information is helpful for other ADRC staff.*

ATTEMPTED CONTACTS

***NOTE: Contacts and activities that have an outcome of "Administrative" will not be submitted to encounter reporting. It is important to document these activities to show the sequence of events and for quality customer service.**

Please do not select any other outcomes when you are selecting "Administrative" or "Attempted".

1. Q: Would six attempted calls to a guardian count for six contacts?
   A: *If the attempted calls occur on different days, each is recorded separately with each outcome being recorded as an "Attempted Contact". However, if the attempted calls all occurred on the same day count this can be recorded once and each attempt would be listed in the notes section with an outcome of "Attempted Contact".*

2. Q: If staff enters the Long-Term Care Functional Screen and attempt to call the person with the results, but they do not answer the phone, therefore the ADRC may send a letter with the results instead. How would you record this situation?
   A: *If this is the procedure at your ADRC, you would record entering of the screen and mailing the results as "Administrative".*

3. Q: When an ADRC makes several attempts to reach a customer for follow up but are unable to reach the customer, does the ADRC receive credit for the follow up?
   A: *The contacts are recorded as attempted because information was not exchanged. The fact that several attempts were made without success would demonstrate the effort to complete a follow up contact however selecting "Provided Follow-up" is not appropriate because contact was never made.*

4. Q: If you enter an attempted call and then get a return call resulting in an exchange information, do you go back into the attempted call that you already entered and change this? Or do you enter a whole new call?
   A: *Staff should do which of these two options they find easiest. Either go back in to the attempted call note, and add to it regarding the actual contact but then they must remove the outcome "Attempted Call" and change it to one of the other outcomes or they won't get credit for it. OR they can add a brand new contact and what the call was about. If they hadn't yet noted the attempted call, I would do the first option and just mention that a message was left and then the customer called back and do not use the outcome "Attempted" at all. However if I already recorded it, I would just start a new call and go from there.*

LONG TERM CARE FUNCTIONAL SCREEN (LTC FS)

1. Q: Since the use of the outcome for LTC FS is changing, is there a report that we can run to see how many screens are run?
A: *No, unfortunately once you transfer a screen you can no longer see what ones were completed by the ADRC.*

2. Q: How do I record LTC FS quizzes, updates, etc.?
A: *LTC FS quizzes, updates, etc. are not related to a consumer so a note is not entered in the Client tracking database.*

3. Q: We are hearing that staff are concerned that their number of LTC FS outcomes will decrease since they are not checking this outcome when they are entering the FS into the FS database.
A: *Prior to 2016, ADRCs were only supposed to be capturing this outcome once, when the FS was completed. Therefore, if now, they meet with the individual once for the FS interview, the outcome for that visit will be LTC FS. In addition, now they may actually have FS checked additional times if additional contacts are needed for more information related to completing the screen. If staff were recording the outcome LTC FS (or anything else) differently in 2015 and earlier, ADRCs should remember that we will not be comparing 2016 data to previous years for specific items outcomes. These changes are going to create consistency from ADRC to ADRC.*

4. Q: What should the ADRC record as Call Type and Caller Type when entering the LTC FS?
A: *If an ADRC chooses to record this information in the Client tracking database, the call type should be "email/electronic" because they are completing an electronic form and caller type should be "other".*

5. Q: How does staff enter information when working on a functional screen? What is the call type? For example, if Amy is working on entering the information in the LTC FS and needs to enter the information in client tracking database, she enters the caller name and next she has to enter a call type. There is not an administrative option for call type.
A: *If staff are entering information into LTC FS, i.e. data entry, this is "administrative". If they are sending a health form to a health care provider it is also "administrative" however if they contact another person to ask questions to receive more information, this is a contact. If the information they are receiving is for the screen, it should be listed with an outcome of "LTC FS". There is not a call type for "administrative" or paperwork items. Administrative contacts are not sent to DHS via Encounter so what is listed as the call type really won't matter. Since information is being entered into the computer, "email/electronic" seems to be appropriate.*

6. Q: I am working with a family on applying for MA. We've completed the LTCFS but they are slightly over assets yet for MA. Today, the son emailed me updated values of assets just to keep me up to date. The email did not require a response from me. Is this administrative or a direct contact 'provided assistance with MA process?
A: *You should reply to the email to acknowledge that you received it and to restate to continue to provide updates or let you know when she is at the necessary assets to come back. By replying then it would be a contact and you could choose both MA Application and I&A if you wanted or just MA Application.*

7. Q: I worked with a man recently who is living in assistive living but running low on money. I completed a LTCFS, but he did not qualify at a NH LOC. I then provided options to the family. The niece emailed me today to let me know they secured an apartment in Ozaukee Co for her uncle and thanked me for my help. I responded to the email wishing him the best and thanking her for the update. Is this administrative or a direct contact?
A: *It is a contact when you count both the email from the niece and your response back. It would be I&A.*

8. Q: For the LTCFS, when I do data entry of the screen is the ADRC Outcome "Administrative"?
A: Yes, if it is strictly data entry then that is an administrative task. When the ADRC is administering the functional screen, e.g., talking to the consumer, talking to IM, talking to a physician, etc., where information is exchanged, this would be a contact and staff would select the ADRC Outcome of "Long Term Functional Screen". If only doing data entry it is not necessary to note that in the client tracking database system unless required locally at your ADRC.

APS/AGING

1. Q: An APS referral is received by the ADRC Specialist, who then makes a referral to the APS worker. How is this recorded?
   A: *The initial referral is a contact and should be recorded. When the ADRC Specialist makes the referral to APS this is considered an administrative contact. APS would record contacts in another system.*

2. The ADRC has employees that have split positions between APS and I&A. Should Adult Protective Services (APS) contacts be counted?
   A: *No, contacts specific to APS investigations are not recorded in SAMS IR as this is not an ADRC function and cannot be funded with ADRC dollars. However, if an employee with a split position is covering phones as an I&A worker and answers a call regarding a customer who may be being abused, they may collect the information and enter the initial call as a contact. However, if the employee continues to contact others to find out more information or contacts the reported victim, this is part of the investigation and falls under the realm of APS and should not be recorded in the client tracking database.*

3. Q: A request for information about home delivered meals is received by the ADRC Specialist, who then makes a referral to the nutrition director. How is this recorded?
   A: *The initial referral is a contact and should be recorded. When the ADRC Specialist makes the referral to the nutrition director this is considered an administrative contact. The nutrition director would record contacts in another system (e.g. SAMS is used for Aging Units).*

4. Q: The ADRC is combined with the Aging unit. Should contacts specific to Aging Services be entered?
   A: *Information shared by an ADRC Specialist regarding Aging Services, whether or not the ADRC and Aging are combined, should be recorded because information is being exchanged. When an Aging staff person contacts consumers to set up nutrition or caregiver services, etc. these activities are recorded in SAMS, not SAMS IR or other client tracking database.*

5. Q: A few ADRC's that are integrated with Aging are stating that the service delivery template has been changed from the previous template.
   A: *This is the template that pops up at the end of each call. Chris has contacted Karl about this as this is an Aging template and we did not change it. So for now I don't have an answer. We may have to contact Carrie Kroetz about this if Karl is not aware of why this has changed.*

OTHER

1. Q: For ADRC's that are integrated with Aging, should ADRC staff record calls or walk-ins for people calling or coming in for a congregate meal, schedule transportation, etc.?
   A: *No. These types of calls are not recorded because information is not exchanged. If information is requested about these programs (e.g. the hours, cost, locations, etc.), then information is exchanged and the call is considered a contact.*

2. Q: Can an asterisk be removed form a person's name if his/her situation changes?
   A: *Yes.*

3. Q: Whose DOB should be requested and recorded when the caller is a daughter calling about her mother?
   A: *It is not necessary to request the DOB of the caller, only the consumer. However, if it is shared, it should be recorded as it may help for identification for future calls or caregiver identification.*

4. Q: In SAMS, can a date be enterable and not auto-filled?
   A: *Yes, disable the timer.*

5. Q: What if we provide assistance regarding a youth under 17 years old? What age group should be documented?
A: *List as "17-21".*

6. Q: If a consumer is calling and asking about senior care, but has no disability, how would the disability type be entered?
A: *Elderly (age 60 or older).*

7. Q: In the ADRC Outcomes, who is "Complaints/Advocacy" referring to? The ADRC or a provider?
A: *Either one. It will be differentiated in the Call Topics section as either an "ADRC Complaint" or "Complaints (other)."*

8. Q: Should the memory screen outcome be checked if you have a conversation about the memory screen, but do not actually complete the screen because the consumer is not interested?
A: *No because the memory screen is not being completed.*

9. Q: How can I run a Report on Follow Ups if staff members are not checking the box "Follow Up" in the Activities Section?
A: *ADRC's can run a follow-up report based on the use of the Outcome – "Provided Follow-up". An ADRC would use the SAMS Call Profiler Report to generate a report on how many times staff provided follow up.*

10. Q: Does the disability type need to match the Long Term Care Functional Screen or other program categories?
A: *It does not have to match. Use the best information you have available at the time.*

11. Q: If an agency/provider is entered as the consumer how should the disability type be entered?
A: *The disability type should be recorded as unknown.*

12. Q: What is the preferred language: customer, consumer or client?
A: *The Department prefers not to use "client." Consumer or customer is preferred.*

13. If a customer is contacting the ADRC to register for a seminar or workshop, should this be recorded in the client tracking database?
A: *This is not an exchange of information and does not need to be noted in your client tracking database. This is similar to if a customer calls the ADRC to sign up for a home delivered or congregate meal, transportation, prevention program, tax appointment, etc.*

14. Q: How are not enough providers logged?
A: *As an unmet need.*

15. Q: How do we record when we provided information regarding dental providers out of our community because no providers in the area accept Medicaid?
A: *Since the service is not available in your community it is an unmet need.*

16. Q: How are complaints about landlords recorded?
A: *The call topic would be recorded as "Housing".*

17. Q: If an ADRC Specialist doesn't know someone's age how should it be reported?
A: *There are four age groups. Make an educated guess based on the conversation with the customer.*

18. Q: Can the client tracking database lead person be the same person who does encounter?
A: *Yes*

19. Q: Can SAMS trigger when you forget a field?
A: *No, unfortunately that cannot happen because SAMS IR is built for many different users that do not have the same requirements. You can run a report every week to see your errors and clean them up before they build up over a month's time.*

20. Q: In the notes section in SAMS, if you select a SW with a particular agency, all the notes pop up for all clients. Is there a setting change or a way to filter?
A: *No, callers are connected to each consumer they call about.*

21. Q: "Legal gender", what are you looking for?
A: *An ADRC should indicate what the individual identifies as but must choose male or female.*

22. Q: What if we can't get DOB for a consumer?
A: *If you are unsure or the date of birth is incomplete, enter what you do know. Once you do receive the information update the record.*

23. Q: Where do I indicate a referral to EBS or DBS?
A: *You would indicate the referral was made in the notes section and then capture the discussion in call topics, e.g. "Public Benefits- LTC Programs", "Public Benefits (Other)", etc.*

24. Q: How many call topics should be entered for each call?
A: *Each call must identify at least one call topic, but more should be recorded if applicable.*

25. Q: Many of our offices are located within buildings that also house other human services organizations and the ADRC often has customers coming in to ask for directions how to get to another part of the building, they are not necessarily intending to come to the ADRC for this info, we just happen to be the first face they see, would this be a contact?
A: *No. Asking for directions because they are at your site and need directions to find certain buildings is not a contact.*

26. Q: When is encounter reporting due?
A: *ADRCs will submit encounter monthly. It is due by the 20th of the following month. If the 20th day lands on a weekend or holiday, encounter submissions are due on the following business day.*

27. Q: Questions on incoming and outgoing under call type.
A: *Incoming and outgoing refers to phone call. So, if the phone rings that is an incoming call. If the ADRC places a phone call to a consumer or contact that would be outgoing. This has not changed for those that have been using SAMS IR.*

Additional Question

28. **Q: When an I&A receives a voicemail from a customer and then calls the customer back, should the Call Type be recorded as Incoming or Outgoing?**
A: *Staff should select the Call Type "Incoming" because the contact was initiated by the customer when he/she originally contacted the ADRC and left the voicemail.*