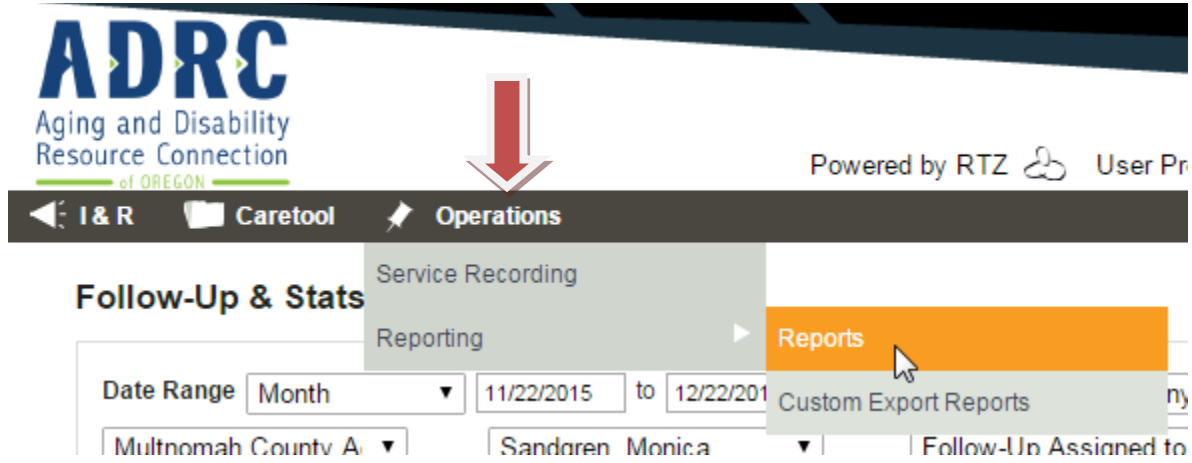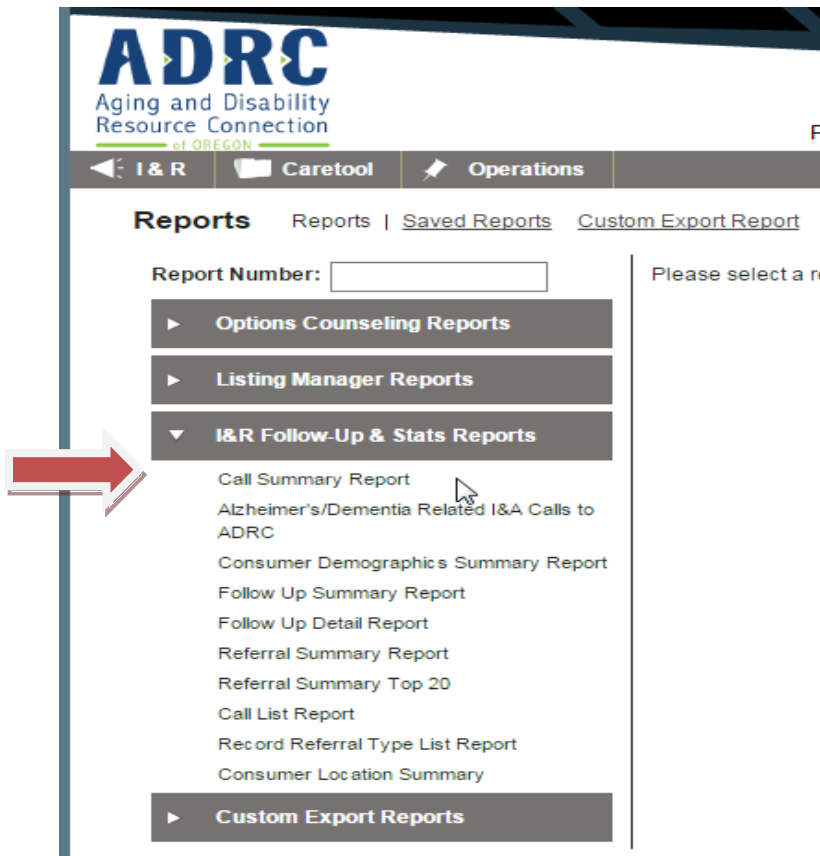**Go to Operations>**

- **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 12/01/2015 To 12/31/2015 *

Population ▼

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

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

Report Export Type

◉ Pdf

Save current filter

Save Report? ☐

Run Report

- **Close this window:**

✕

✓ **Report successfully created.**

Your report should have appeared in a separate window.
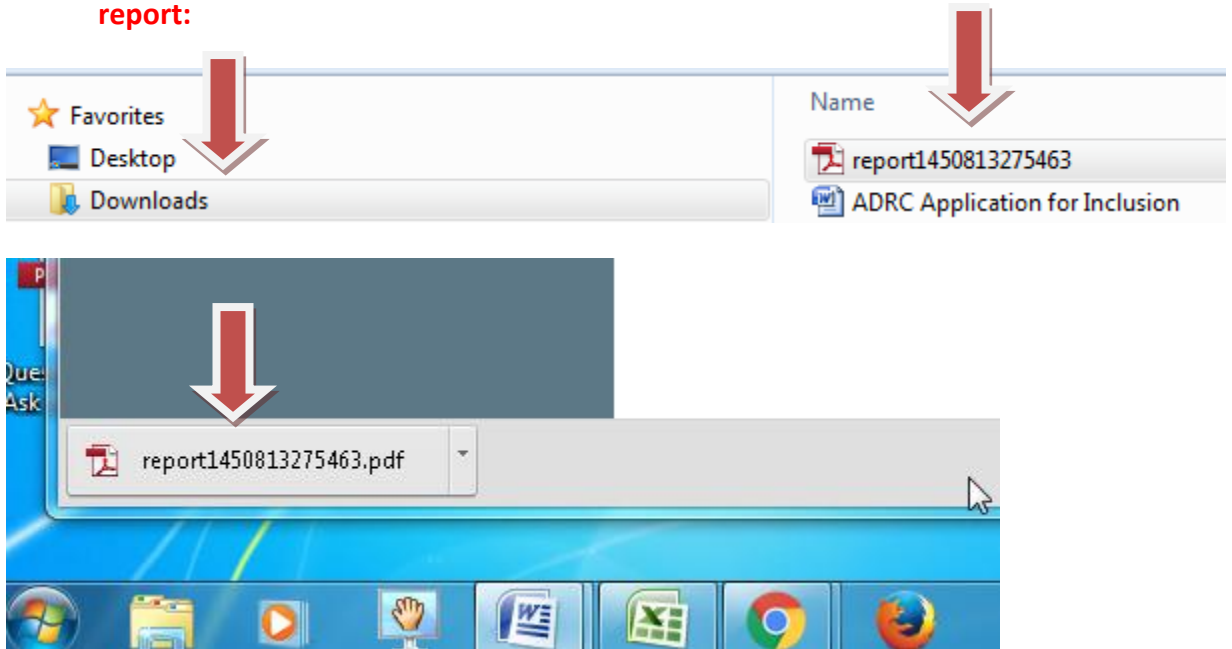Please select a next step from the options below.

Shortcuts:

Re-run this report with different Filters

Run a different report

More options:

Save report Filters   What's this?

Page 2 of 5

- **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 [edit]
☐ Agency
☐ Caller type
☐ Branch

☐ Call date
☐ Contact method
☑ Call Status [edit]
☐ 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 [edit]

- **Filter by " Blanks" to identify call records missing call outcome:**

Call ID	Call Status	Call Outcomes
299558	Incomplete Call	
299538	Complete Call	