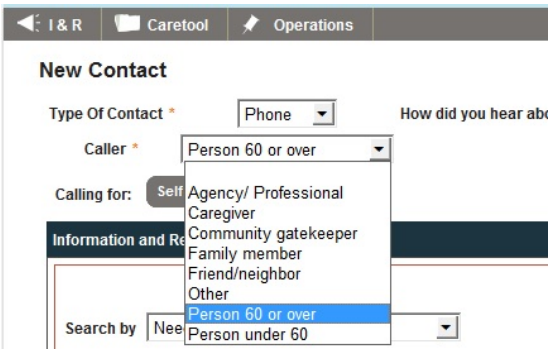
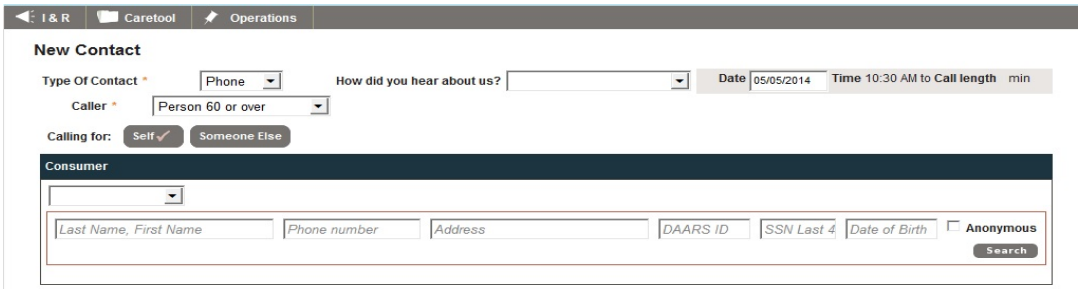
QuickGuide:
I&R Calls in DAARS

To get to the I&R module where you will be able to record incoming calls, make referrals, and provide assistance to callers; you will first go to I&R on the menu, then "New Contact" on the drop-down list.

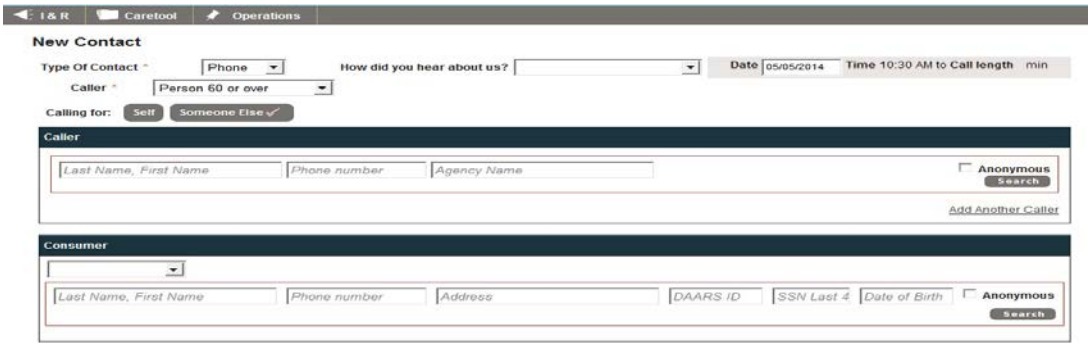
The I&R module can be used in a variety of settings, so the first thing to do is to identify the type of contact being recorded. Typically, this would be "Phone" for a worker on a call-in intake line, but could be a "Walk-in" or someone that emailed. Select the appropriate type of contact from the drop-down list provided. Next, indicate how the contact heard about the agency, or how they found you by selecting the appropriate answer from the drop-down list. The date and time of the call will be automatically recorded, but the date can be changed if needed. Select the most appropriate description of the caller from the drop-down list.



Once it has been determined if the caller is calling for "Self" or "Someone Else", click on the appropriate button and the screen will be modified based on your choice. Choosing "Self" will open a new box that will allow you to search for an existing consumer, record a call for an anonymous consumer, or adding a new consumer.



If the caller is calling for "Someone Else", there will be an additional section to add info on the caller.



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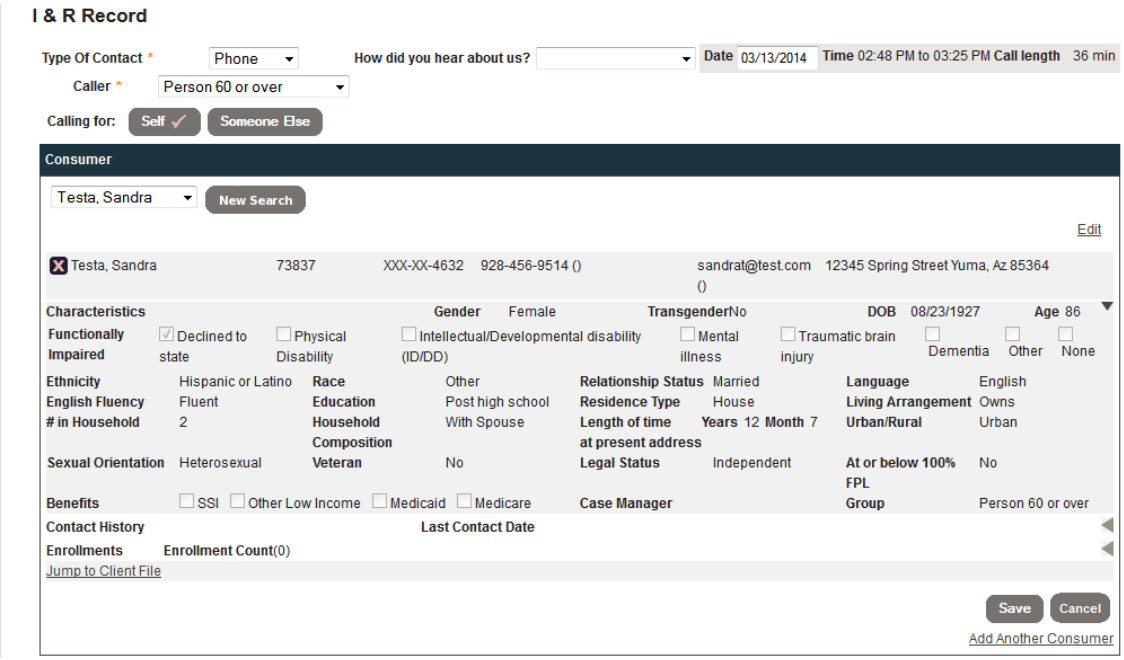
It is important to understand that the system searches and tracks "Callers" and "Consumers" differently. "Consumers" are searched against the actual DAARS client database, and when you add a new "Consumer" you are actually adding a new client to the system. "Callers" are searched against a separate list of previous callers, and when you add a "Caller" to the system they won't be accessible as a client in other modules of DAARS.

If adding information on a "Caller", simply use the caller's name or phone number to search to see if the caller is already in the system. You may either choose to add a new caller, by clicking on the "Add New Record" link from the search results, or select an existing record. After the caller has been selected, you can add a relationship to the consumer, and edit the email, phone and address information. You may also select the "Anonymous" check box if the caller declines to identify themselves, which will trigger a prompt to ask the caller if they have called previously within the last six months. If there is more than one caller you may add additional callers to this call by clicking the "Add Another Caller" link below the "Save" and "Cancel" buttons.

When adding information about the consumer being served by the call, the first step is to use one or more of the available fields to search to see if the consumer is already listed in the DAARS database as a client. Use the search list to either select an existing DAARS client, or click on the link to "Add New Record" to add a new client to DAARS. The consumer that you are choosing is the individual that needs information, referrals and/or assistance. If you have selected an existing client to record as the "Consumer" for the call, you will see additional information displayed on that client, including demographic information. You may edit the demographic information in this section. If the demographic information is edited in this section, it will be updated in the client file identification and demographic section.



Below the consumer characteristics, there is a section titled "Information and Referral." In this section you can search for listings in the resource directory and provide the information to the consumer. You may provide the referral to the consumer via email, phone, or in person, if they happen to be there. Another option is to give them the information about the listing without referring them to the service.

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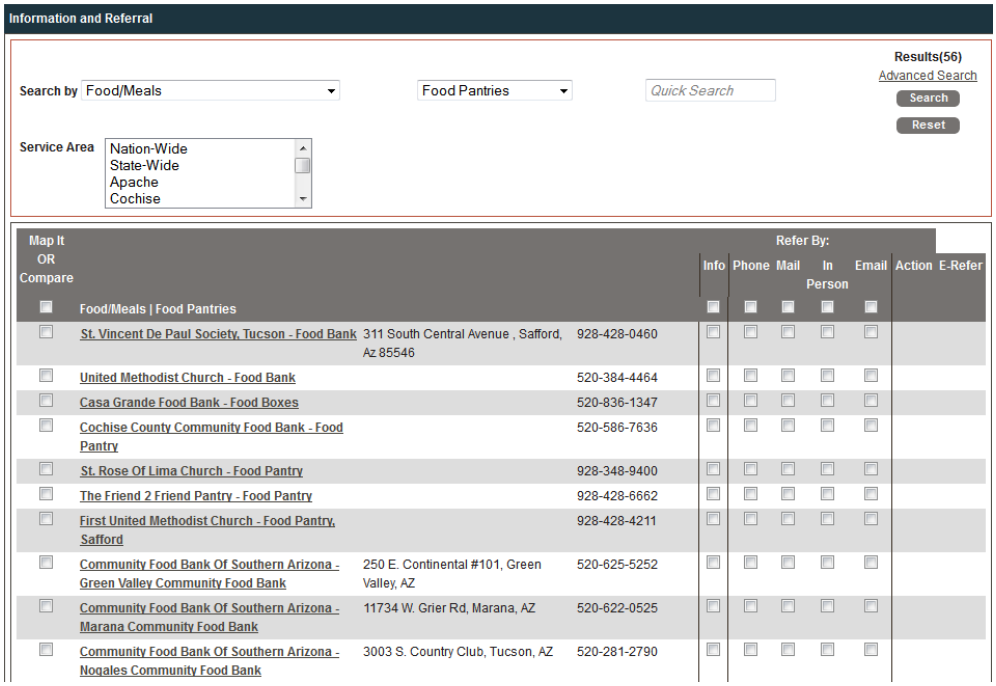
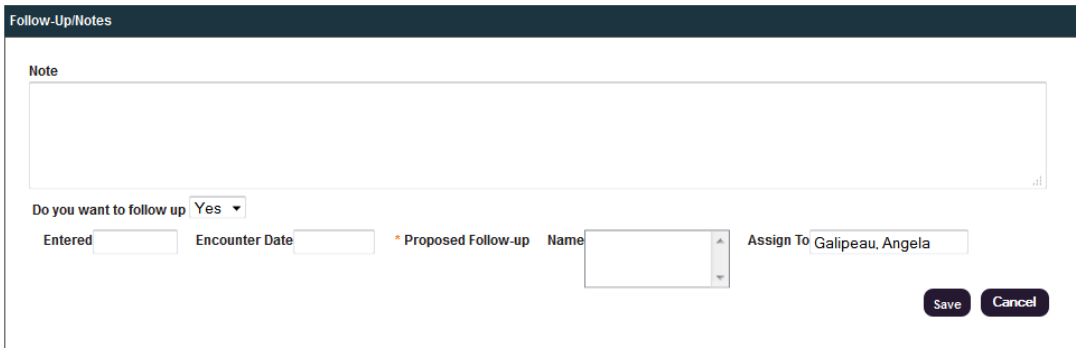


If a follow up is desired you may use the "Follow up/Notes" section to assign a follow up date, assign a case manager to perform the follow up and also include any notes that may be relevant for the case manager when the follow up is being done.



Once you have entered in the information for the call, there are a couple of different options. You may **Save and Complete** the call, mark the call as **Incomplete**, **Save** the call to finish later, or **Cancel** the call if you do not wish to have the information saved.

* Required field. You must fill-out all required fields before "saving and completing" an I&R record.