

Introduction: People Search Menu Button

-How to enter Information and Referral Calls/Notes

Use the People Search Menu Bar Button to enter I&R notes.
(These are NOT Consumer Service Notes.)

I&R is for: Anytime information is given to either an individual with a disability or to a community member.

First! search to check if the person is already entered into your system.
If they are already entered, select their record.

To search use the fields on the right to search by name, phone or birth date if desired.

Searching is very important, you don't want to enter a duplicate person in the system.

The screenshot shows the 'People Search' interface. At the top, there is a navigation bar with buttons for 'Staff Center', 'People Search' (circled in red), 'Groups', 'Community Activity', 'General Services', 'Reports', 'Admin', 'Themes', and 'Logout'. Below the navigation bar, the 'People Search' section contains several input fields: 'Last Name:', 'First Name:', 'Phone Number:', 'Birthdate:', 'People ID:', 'Organization:', 'SSN:', 'Search All?:', and 'My Consumers:'. To the right of these fields are three buttons: 'Search', 'Reset Search', and 'Add New Person...' (circled in red). Below the search fields is a table titled 'Active People' with columns: 'Full Name (Last, First Middle)', 'Phone', 'Birth Date', 'Type', and 'Person Type'. The table lists various individuals, including 'feamale, test', 'A, Anonymous Female', 'A, Anonymous Male', 'Aaker, Empty', 'Amann, Sammy', 'Arowsmith, A', 'Benson, Sandra Sanmson', 'Bluma, Dj', 'Braceros, Kristine Mae', 'Brown, Sammy', 'Cox, Kristin', 'daniel, farming', 'Doe, John', 'Grande, Tom Calhoun', 'Ho, Someone', 'Hoffa, Jimmy', 'Jonson, Michelle', and 'Jon Search'. At the bottom of the interface, there are two columns of 'Quick Filters': 'Consumer Quick Filters' (Active 19, Closed 3, Contacts Overdue 8, Missing Data 18) and 'Caller Quick Filters' (Total I&Rs 8, Follow Ups 7, Volunteers 1, Active Volunteers). The bottom right corner shows 'Page 1 of 41' and 'View 1 - 41 of 100'.

If you find the name, double click it to open the record.

If you don't find the name, click "Add New Person..." button.

Enter anonymous calls under the "A, Anonymous" name records.

After you have the record open, there are 2 tabs to complete:

Complete the **Caller Demographics** Tab with information you have. It can be common for I&R records to have limited information.

Step 2: Add a “New I&R Call...” This is where you enter the date and note. Warning: Do not skip this step, you must enter the call date in the New I&R Call screen.

- 1. Caller Demographics: Gender, First and Last Name are required to begin saving the new record. Enter these first. If there is no Last Name, you can enter “Z” or “NA” for Not Available.

The screenshot shows a web-based form for a caller record. At the top, there are buttons for 'Make Consumer...', 'Send Email', 'Print Envelope...', 'Make Volunteer...', and 'Back/Search'. Below these are tabs for 'Caller Demographics', 'I&R Calls', 'Groups', 'Volunteer Notes', 'Mentor Match', 'Documents', and 'AT-AssistiveTech'. The 'Caller Demographics' tab is selected and highlighted with a red circle. The form fields include: Salutation (dropdown), *Gender (Female), *First Name (A), Middle (empty), *Last Name (Caller), Suffix (dropdown), Address, Address2, City/ST/Zip (dropdowns), Find Zip (button), Is Homeless? (dropdown), NO MAILINGS (checkbox), Email, School (dropdown), Title, Organization, Other Org (dropdown), Caller Type (dropdown), Learned of Services (dropdown), *County (dropdown), Race (dropdown), Birthdate (text), Age (text), Estimated Age (text), Estimate Birthdate (button), Marital Status (dropdown), Registered to Vote? (dropdown), Is Veteran? (checkbox), Status (dropdown), Communication Preference (dropdown), and Other Notes (text area). At the bottom, there are two tables: 'Phone Numbers' and 'Disabilities'. The 'Disabilities' table has a yellow button labeled 'Step 2: Add IR Calls- Alt+I' highlighted with a red circle.

- 2. Click on I&R Calls Tab or Click “Step 2: Add IR Calls” button. Or use key combination ‘Alt+I’

You must add the actual I&R Note next, this is the final step to adding a I&R Note record.

The I&R Call Notes screen will open-

The screenshot shows a web application interface for managing calls. The top navigation bar includes 'ID: 698 A Caller', 'Make Consumer...', 'Send Email', 'Print Envelope...', 'Make Volunteer...', and 'Back/Search'. Below this is a menu with 'Caller Demographics', 'I&R Calls', 'Groups', 'Volunteer Notes', 'Mentor Match', 'Documents', and 'AT-AssistiveTech'. A 'New I&R Call...' button is highlighted with a red circle. The main content area is titled 'Call Details' and contains fields for 'Date' (09/09/2021), 'Staff' (MICIL Support), 'Office' (Sioux City), 'Success Story?' (checkbox), and 'Notes'. There are also checkboxes for 'Callback Needed?' and 'I&R Call Report...'. A 'Needs and Outcomes' table is visible on the right, with columns for 'Barrier Exists' and 'Outcome'. At the bottom, there are two tables: 'Information Provided' and 'Referrals'.

Tips:

“**Success Story?**” **Check box** will flag this note as a success story to be retrieved later for use in writing narratives.

“**Callback Needed?**” **Check box** will put this record as a reminder on the Staff person’s Staff Center.

Enter the Callback Date when you call them back and that will remove the callback from the Staff Center.

Need and Outcomes- [Used on the Federal PPR report](#)

Enter If there exists a Need or Barrier and if you improve their access with information or referral enter that in the Outcome box.

Each time you have communication with the same person, provided you are not making them a consumer, you will click “New I&R Call...” button.