Introduction: People Search Menu Button
-How to enter Information and Referral Calls/Notes

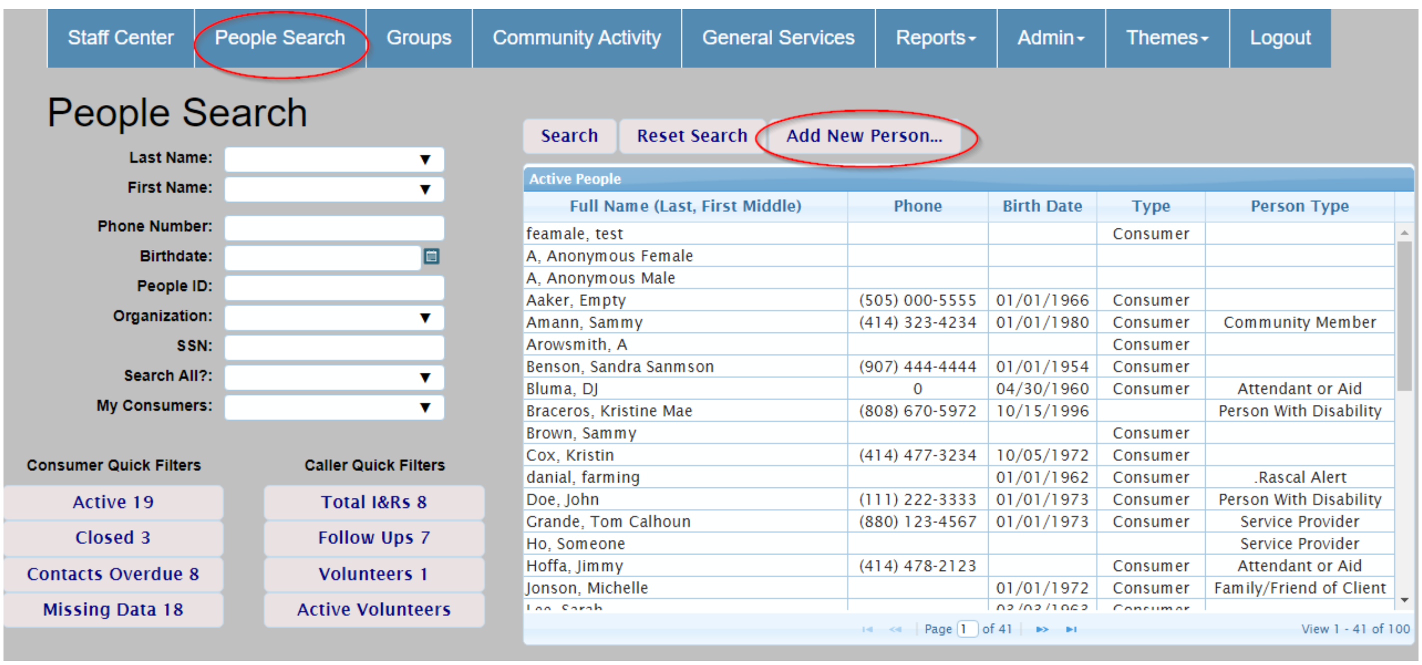
Use the People Search Menu Bar Button to enter I&R notes.
(These are NOT Consumer Service Notes.)

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.



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

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

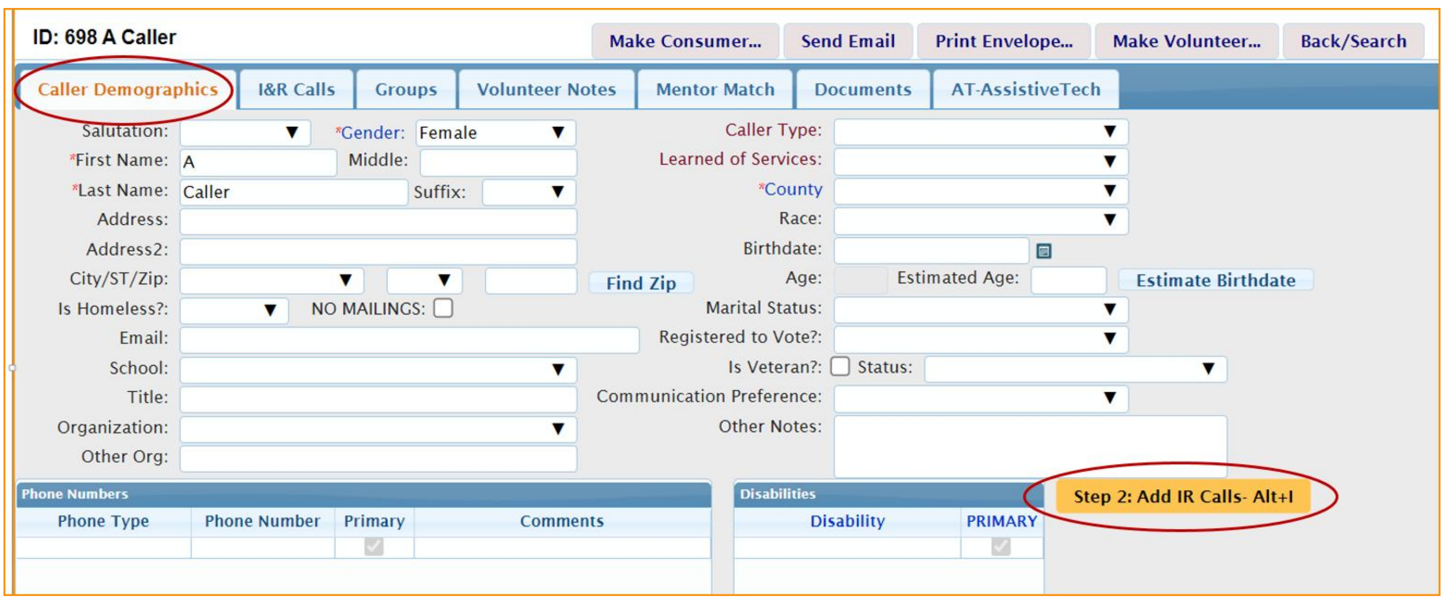
Enter anonymous calls under the "A, Anonymous" name records.

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.

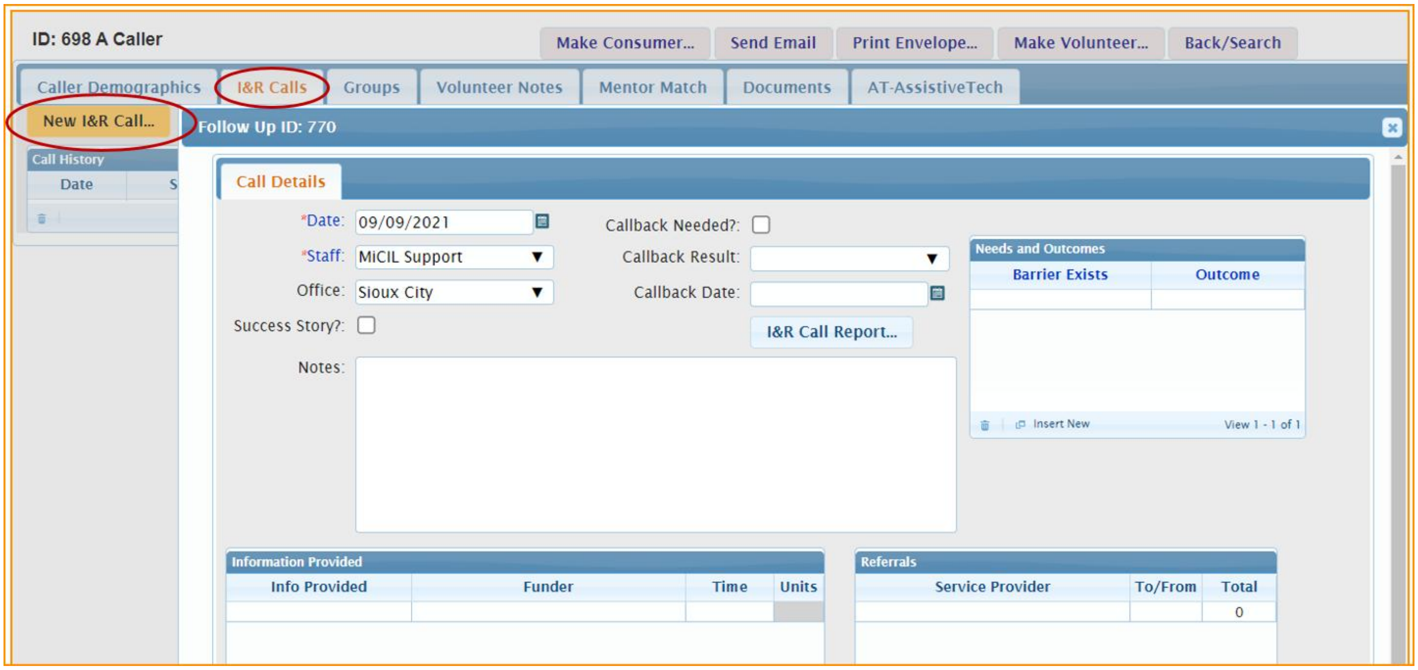
- ☐ 1. Caller Demographics: Gender, First and Last Name are required to begin saving the new record. Enter these first. If there is no Last Name, you can enter “Z” or “NA” for Not Available.



- ☐ 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-



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.