

Options and Considerations Regarding Follow-ups in iCarol

iCarol offers a suite of tools for clients to use to track and report on follow-ups. There are a number of options; this document is meant to help clients choose the option that will best suit their agency's policies and procedures.

Option 1

Track everything regarding a follow-up to a caller in one follow-up activity attached to the original call the caller made to your phone line.

The screenshot shows a follow-up activity form in iCarol. At the top, there is a button labeled "Edit the follow-up below". Below this is a header "Phone call: Check in". The form contains the following text: "Entered on: Wednesday, March 06, 2013 at 11:40 AM by Albert Lester", "Closed Due on Friday, February 01, 2013 at 1:00 PM", "Assigned to: Albert Lester", "Contact info: 209-555-5555 - Ask for Mary", "OK to leave message", "NOT OK to use caller's info if dealing with third parties", "Attempt to contact: 2 times", and "Contact attempts so far: 2 times". Below this is a description field containing the text: "Please check in with Mary and see how she is feeling today. Please be sure to assess for suicide.", "February 26, 1pm - Did not reach Mary, please try again tomorrow.", and "March 1, 1pm - Spoke with Mary. She is feeling better and is not having any thoughts of suicide at this time." At the bottom of the form, there is a button labeled "Add a new follow-up activity to the call".

To accomplish this, before submitting the original call report, the call taker should fill out the follow-up section in the Finish tab of the call report. At that time, the "Status" field should be set to "Open" so this call report will appear in the Follow-up folder on the "All Calls" page so call takers know there is a follow-up to complete. Each time an attempt is made to contact the caller, the call takers should click the "Edit the follow-up below" button and change "Due On" (to reflect the date and time to try to reach the caller again), and "Contact attempts made so far" (to reflect how many attempts have been made to reach the caller and complete the follow-up). They should also add a line of text in the Description section to indicate what happened during their attempt. When the caller is reached and the follow-up is complete, the call taker should click the "Edit the follow-up below" button and change the "Status" from open to closed, update "Contact attempts made so far", and add a line of text in the Description field to indicate the caller was reached and the follow-up is complete.

This is the simplest option to handle follow-ups, but has some shortcomings when it comes to reporting on follow-ups. In Statistics, by choosing Follow-ups in the horizontal menu, you can get some very basic information regarding follow-ups. This report does not include any details such as if the follow-up was successfully completed or how many attempts were made to reach callers. This report will tell you how many calls a follow-up was initiated on (the number beside "New follow up activities initiated") and the

percentage of total calls which had a follow-up attached (the number beside “Inbound calls with at least one follow up activity”). What this report cannot tell you is how many attempts were made to complete a follow-up, and if those attempts were successful or not.

The screenshot shows a web interface with a sidebar on the left containing navigation options like Home, Calls, Messages, and Statistics. The main content area is titled "Choose a report" and "Date Range". It displays a "Case Summary" for a selected period. The summary includes the following data:

- New follow up activities initiated: 1
- Inbound calls with at least one follow up activity: 0%
- Average time spent on initial calls: 25 mins.
- Average time spent on followup activities: 0 mins.
- Total time spent on all inbound calls and follow-ups: 14.8 hours
- Total initial calls and followups: 21
- Average time spent on all inbound calls and follow-ups: 28 mins.
- Phone call followups initiated or updated: 1 calls
- Email followups initiated or updated: 0 emails
- SMS / Text followups initiated or updated: 0 SMS
- None: 0
- Reschedule Followups (Open): 0
- Reschedule Followups (Closed): 0
- Assessment Followups (Open): 1
- Assessment Followups (Closed): 0
- Advocacy Followups (Open): 0
- Advocacy Followups (Closed): 0
- Survey Followups (Open): 0
- Survey Followups (Closed): 0
- Cases (calls) without a new or updated follow-up during the period specified above: 20

You can get further details about each follow-up if you complete a call report export and refer to the file named “CallReportFollowups”, which is the first file listed when you download the Call Report export.

The screenshot shows a Windows file explorer window with the following files listed:

Name	Type	Compress...
KarolExport-ElmdaleHelpline-CallReportFollowups-20130306_150911	Microsoft Excel Comma Sep...	1 KB
KarolExport-ElmdaleHelpline-CallReportNeedsMetAndUnmet-20130306_150911	Microsoft Excel Comma Sep...	3 KB
KarolExport-ElmdaleHelpline-CallReports-20130306_150911	Microsoft Excel Comma Sep...	25 KB
KarolExport-ElmdaleHelpline-CallReportsLinkedTogether-20130306_150911	Microsoft Excel Comma Sep...	4 KB
KarolExport-ElmdaleHelpline-CallReportsOutOfDatabaseReferrals-20130306_150911	Microsoft Excel Comma Sep...	1 KB

This export shows all the selections made in the follow-up section. You can refer to the “ContactAttemptsMadeSoFar” column for how many attempts were made to reach the call, and to the “ActivityMessage” column to determine which follow-ups were successfully completed and which not. In essence, you will be hand counting by using this export, and this can be cumbersome and time consuming if your agency offers a lot of follow-ups.

The screenshot shows an Excel spreadsheet with the following data rows:

CallReportNum	ReportVersion	DateOfInitialCall	CallerName	PersonEnteringAc	ActivityStatus	ActivityTitle	ActivityMessage	ContactAttemptsMadeSoFar
12251615	2-1-1	27/02/2013 9:01	Unknown	Valeria McEttrick	Closed	QA Follow-up Survey		none yet
12852000	Crisis Line Call	26/02/2013 12:33	Mary	Albert Lester	Closed	Check in	Please check in with Mar 2 times	

Option 2

Track follow-ups to one caller in several follow-up activities attached to the original call the caller made to your phone line.

[Edit the follow-up below](#)

Phone call: Check in

Entered on: Wednesday, March 06, 2013 at 11:40 AM by Albert Lester

Closed Due on **Thursday, February 28, 2013 at 1:00 PM**

Assigned to **Albert Lester**

Contact info 209-555-5555 - Ask for **Mary**.
OK to leave message.
NOT OK to use caller's info if dealing with third parties
Attempt to contact: **2 times**
Contact attempts so far: **1 time**

Please check in with Mary and see how she is feeling today. Please be sure to assess for suicide.

February 26, 1pm - Did not reach Mary, please try again tomorrow.

[Edit the follow-up below](#)

Phone call: Check in

Entered on: Wednesday, March 06, 2013 at 12:18 PM by Albert Lester

Closed Due on **Friday, March 01, 2013 at 1:00 PM**

Assigned to **Albert Lester**

Contact info 209-555-5555 - Ask for **Mary**.
OK to leave message.
NOT OK to use caller's info if dealing with third parties
Attempt to contact: **2 times**
Contact attempts so far: **1 time**

Please check in with Mary and see how she is feeling today. Please be sure to assess for suicide.

March 1, 1pm - Spoke with Mary. She is feeling better and is not having any thoughts of suicide at this time.

[Add a new follow-up activity to the call](#)

To accomplish this, before submitting the original call report, the call taker should fill out the follow-up section in the Finish tab of the call report. At that time, the "Status" field should be set to "Open" so this call report will appear in the Follow-up folder on the "All Calls" page so call takers know there is a follow-up to complete. Each time an attempt is made to contact the caller, the call takers should click the "Edit the follow-up below" button and change "Status" to closed, update "Contact attempts made so far" (to reflect how many attempts have been made to reach the caller and complete the follow-up) and they should also add a line of text in the Description section to indicate what happened during their attempt. When they save this, the call taker will be taken back to the original call report where they should click the "Add a new follow-up activity to this call". They should fill in the follow-up section just as they would in a call report, indicating the date the second attempt should be made. When the caller is reached and the follow-up is complete, the call taker should click the "Edit the follow-up below" button for the most recent follow-up activity and change the "Status" from open to closed, update

“Contact attempts made so far”, and add a line of text in the Description field to indicate the caller was reached and the follow-up is complete.

Using this method increases the accuracy of the Case Summary report under Follow-ups in Statistics. The first number reported, “New follow-up activities initiated” will accurately report how many follow-up phone calls were placed, because it will count each individual attempt made. However, this report cannot provide details on which follow-ups were successfully completed and which not; you would still need to refer to the “CallReportFollowups” file in the Call Report export and count by hand.

Click on an area below to get detailed reports
 Analysis Calls Follow-up Call-based Staff Volunteers Shifts Services Public Services Directory Outreach Security

Choose a report: **Case Summary** Date Range: Period to consider: Through: [dropdown]

Time spent by person

New follow-up activities initiated:	1
Inbound calls with at least one follow-up activity:	0%
Average time spent on initial calls:	25 mins.
Average time spent on follow-up activities:	0 mins.
Total time spent on all inbound calls and follow-ups:	14.5 hours
Total initial calls and follow-ups:	31
Average time spent on all inbound calls and follow-ups:	28 mins.

PHONE CALL FOLLOWUPS INITIATED OR UPDATED: 1 calls
 EMAIL FOLLOWUPS INITIATED OR UPDATED: 0 emails
 SMS / TEXT FOLLOWUPS INITIATED OR UPDATED: 0 SMS

Answers: 0

Assistance Followups (Open): 0
 Assistance Followups (Closed): 1
 Advocacy Followups (Open): 0
 Advocacy Followups (Closed): 0
 Survey Followups (Open): 0
 Survey Followups (Closed): 0

Cases (calls) without a new or updated follow-up during the period specified above: 25

Option 3

Use the follow-up section to track when callers need to be called, but create a new call report for completed follow-ups.

iCarol has a tool whereby you can transfer information from one call report to another, which will save time in filling in fields in the call report. The caller’s name and contact information can transfer, as can selections made in drop-down fields, check boxes or text fields. You must ask the iCarol support team to make the appropriate setting so that this information transfers to the new call report. To create a new call report and transfer the information from the original call report to the new call report, view the originally submitted call report, then click the “Use this person’s information in a new call report” link at the top of the screen.

The screenshot shows a web interface for call reports. On the left is a navigation menu with items like Home, Vols - Staff, Staffs, Calls, Messaging, Resources, Chatboard, Events, and Notes. The main content area has a header with a green 'Call' icon, a link to 'Return to main Calls page', and a 'Printable Page' link. Below the header, there's a yellow bar with the text 'Use this person's information in a new call report' and a 'Print to PDF' link. The 'Details' section lists: Call Report Num.: 12421423, 555-666-5555; Phone Worker: Carmen Lovas; Caller: April Smith (with a 'Create profile' link); Call Date: Monday, March 11, 2013; Call Start & End: 10:03 AM - 10:08 AM (with a red note 'Follow-up due - see below'); Call Length: 5 mins.

When you do so, you will be taken to a screen to choose which call report you would like to use. Once you choose a call report, a new call report will be generated with some of the information from the original call transferred.

If you choose to use this method to track follow-ups, it is highly recommend that you place a field on your call report to indicate that this call was a follow-up call. Doing so will enable you to filter out the follow-up calls from original calls in Statistics, which is important if you do not want to artificially inflate your call volumes. You can also use conditional fields to pop-up specific questions to ask during follow-up calls.

The screenshot shows two sections: 'Follow-up Calls' and 'Follow-up Questions'. The 'Follow-up Calls' section has a question 'Is this call a follow-up?' with a dropdown menu showing 'Yes +'. The 'Follow-up Questions' section has three questions, each with a dropdown menu: 'Was the call helpful?' (Yes), 'Would you call again?' (Yes), and 'Would you recommend this service to others?' (Yes).

This method of tracking follow-up calls can be used in conjunction with either of the two previous methods. Doing so will enable you to get a little information from the Case Summary report under Follow-ups in Statistics. You can also still use the "CallReportFollowups" file in the Call Report export for further information about the follow-ups. Finally, in order to get a count of how many follow-ups were successfully completed, you would complete a "Count of Calls" report in the Analysis section of Statistics, with a call content filter to show only those calls that were follow-up calls.

Call Volume and Caller Analysis

Click on an area below to get detailed reports:

[Statistics](#) [Calls](#) [Follow-up](#) [Followed](#) [Skill](#) [Subscribers](#) [Skills](#) [Resources](#) [Public Resources Directory](#) [Directory](#) [Security](#)

1. Choose:	2. Apply filters:	3. Create chart:
Chart Type:	Location:	Time Frame:
Bar chart		Call Reports and Phone Workers
Recent charts:		
Call Content Filters: Limit results to only include call reports with actions made in:		
Follow-up Calls	In the call follow-up?	Yes
Call another filter		



Option 4

Use the follow-up section to track when callers need to be called, and use a specially created Follow-up Form for completed follow-ups.

Information from the original call can be transferred into a follow-up form as outlined under option 3. If you would like some of the same fields to appear in both forms and transfer from the original call to the follow-up form, the category, group and fields must match exactly. It is important to keep this in mind when making changes to either of the call report forms; anything that transfers to another form must remain exactly the same in both forms.

When you are ready to complete a follow-up form, you would view the originally submitted call report, then click the "Use this person's information in a new call report" link at the top of the screen. When you do so, you will be taken to a screen to choose which call report you would like to use; you will choose the follow-up form at this point.

This method of tracking follow-up calls can be used in conjunction with option 1 or 2. Doing so will enable you to get a little information from the Case Summary report under Follow-ups in Statistics. You can also still use the "CallReportFollowups" file in the Call Report export for further information about the follow-ups. Finally, in order to get a count of how many follow-ups were successfully completed, you would complete a "Count of Calls" report in the Analysis section of Statistics, choosing just the Follow-up Form under "Call Reports and Phone Workers". If you want to run a report on how many calls were received that were not follow-up calls, you will want to uncheck this call report in the "Call Reports and Phone Workers" section.

- [Home](#)
- [Voic - Staff](#)
- [Shifts](#)
- [Calls](#)
- [Messaging](#)
- [Resources](#)
- [Dashboard](#)
- [Events](#)
- [News](#)
- [Statistics](#)
- [Admin Tools](#)

OBSSS CALL

- [My Profile](#)
- [Change Password](#)
- [SysAdmin Tools](#)
- [Help](#)
- [Sign Out](#)

Call Volume and Caller Analysis

No calls match your request. Please change the filters and try again.

Click on an area below to get detailed reports

[Analysis](#)
[Calls](#)
[Follow up](#)
[Outbound](#)
[Staff](#)
[Volunteers](#)
[Shifts](#)
[Resources](#)
[Public Resources](#)
[Directory](#)
[Outreach Security](#)
[SysAdmin](#)

1. Choose:
2. Apply filters:
3. Create chart:

Chart Type	Location	Time Frame
Saved charts...		
Call Context Filters: Limit results to only include call reports with selections that		
All categories ▼		
<p>See the actual Call Reports for this data</p> <p>Total records: calls: 0</p> <p style="font-size: x-small;"> ← Export to Excel * See below for troubleshooting </p> <p style="font-size: x-small;"> * Office 2007 users: Please ignore warnings that the file is "in a different format than specified by the file extension." * OpenOffice users: Please open with Calc instead of Writer. </p>		

Call Reports and Phone Workers [Update chart](#)

Phone Worker
(Only works on calls after 1/1/2011)

All Phone Workers ▼

Call Reports to include:

- 211 Call Report
- Inmate Form
- CONTACT Cris Line Call Report
- Follow-up Form
- Inmate Messaging
- SMS Call Report
- Outbound Calls