



Are Clients Slipping Through the Cracks?

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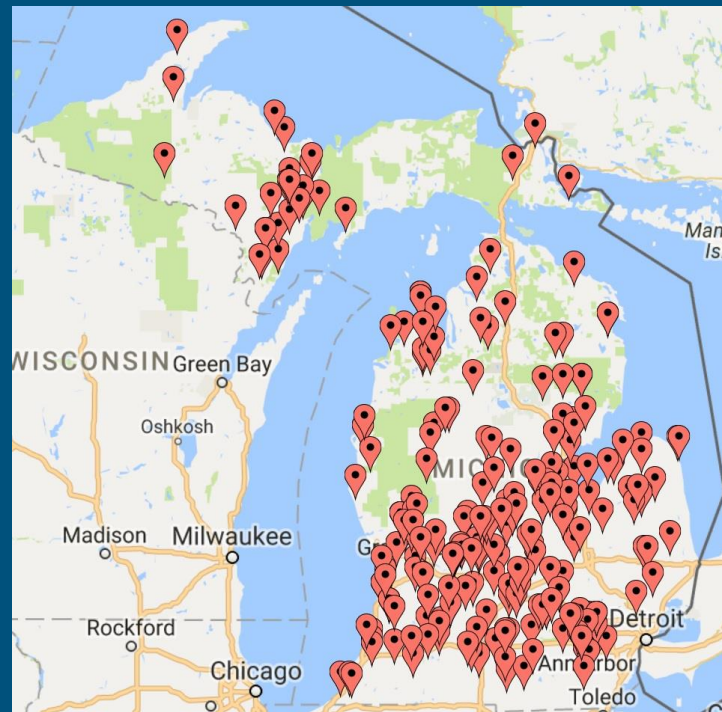


Michigan AgrAbility

Michigan AgrAbility is a partnership between Michigan State University Extension and Easterseals Michigan.

12 hours drive between clients.

60 new clients per year.








How do you keep it all straight?

- 100 or more clients served annually by
- multiple staff from
- different organizations in
- different locations, it is very likely that individual clients might slip through the cracks!



Triage

Who is the highest priority person to follow up with when time is short and to-do lists are long?

Brent Wirth	
Re: Suicide Farmers	Mon 8:25 PM
With appropriate spelling in	
Mariah Martinez	
Re: hay ride pictures	Mon 11:33 AM
I have a meeting for 10 AM	
✓ Last Week	
Theresa McKeel	
Andrea Garza	Sat 3/7
Hi Ned, I was wondering if	
Gregory Fountain	
Re: CleanSpace respirator	Fri 3/6
Just a quick note to say that I	
Mariah Martinez	
Re: hay ride pictures	Fri 3/6
Hi Ned, So I am learning new	
Beverly Berens	
GLEXPO survey	Fri 3/6
Ned, I completed the	
Leilani Carlson	

Timely

Make sure clients are getting timely services, without rushing past them, keep good case notes, work together statewide, and not let the clients get lost in the shuffle...



Colorado AgrAbility

CiviCor case management software provided by Goodwill. \$8000 up front, \$350/month, \$1500 one-time training. Every client is entered into it with demographic information. Candiss can query the data to pull reports. All staff can look at the database and they use outlook calendar to schedule clients site visit, 2 weeks later enter follow up report, and 2 weeks later for follow up. Everyday check calendar to see what is coming and post follow up to do items. Monthly review of clients with supervisor.

Colorado
State
University

Extension



Michigan

Excel, Excel,
filter & sort

Case files on
Office 365
and we each
generally
manage our
own clients.

Excel | AgrAbility > AgrAbility | AgrAbility Casenotes 09-2019 - Saved

File Home Insert Formulas Data Review View Help Open in Desktop App Tell me what you want to do

Calibri 11 B [Grid] [Color] [Text] ... [List] [Table] [General] [0] [0.00] [0]

D7029 Ned will stop by 3/12 to get hog and gate equipment.

	A	B	C	D	E	F
1	Name	Date	Staff Initials	Activity/Recommendations	Total Time Spent	Next action date
7028	Piepkow	2/27/2020	NS	New intake. He is partner at Double Eagle Farms and has severe allergies and needs respirator when handling grain. They raise 3000 acres of corn, soybeans, and wheat. All three partners have respiratory impairments from asthma or allergies. Ned will see about getting him a Cleanspace respirator.	0.2	3/13/2020
7029	Day	3/4/2020	NS	Ned will stop by 3/12 to get hog and gate equipment.	0.1	3/12/2020
7030	Buchler	3/5/2020	NS	MRS: Follow up about what will happen at farm assessment.	0.5	3/12/2020
7031	SmithC	2/28/2020	NS	Visit to Kietzman farm to look at asparagus harvester. He will build one for \$15,000 for 2021 production year if needed. He is too busy for this year. It picks long and short stems, he just sorts it and sells different sized bundles all for the same price. Some people like the shorts, others the longs. Sent follow up letter and recommendations.	1.2	3/12/2020
7032	JonesS	2/25/2020	NS	Called to set up visit when up north with Bernard. Message and set up database.	0.5	3/12/2020
7033	Quick	2/27/2020	NS	Message about physical and schedule F.	0.1	3/12/2020
7034	MillerT	2/27/2020	NS	He needs help planning taxes for 2019 so he can be eligible for MRS for help with an accessible shop.	1.5	3/12/2020
	Detro	2/27/2020	NS	He will be home 3/11 for cattle headlock delivery. Ned needs to write bale	0.1	

2012-2019 activity notes | 2018 data clients

Lets talk about it, how do YOU keep track of it?

	A	B	E	F	G	H	I	J	K	L	M	N	O	P
1	--	Client ID #	SR AP St	County	Heard of us?	Grant yr.	Client's status	Client Entry date	Client Exit date	Age	Client sex	Descripti on	Work Status	1st operation
2	18 April served '19 March	Case ID Number	ClientSt at e	County Code	Heard of us?		Client Status	First Contact Date	Date case closing survey questionnaire sent	Age		Client Desc.	Work Status	Ag Operation
8	yes	2014-006	36	26043	5	2018	3	10/7/2012		70		1	2	5
14	yes	2014-012	36	26157	5	2018	4	10/25/2011	12/14/2018	63		1	2	8
18	yes	2014-016	36	26059	5	2018	3	7/30/2014		77		1	2	2
20	yes	2014-018	36	26073	5	2018	3	3/24/2014		69		1	3	2
22	yes	2014-020	36	26065	3	2018	4	7/18/2012	12/13/2018	73		1	2	13
23	yes	2014-021	36	26139	2	2018	4	9/3/2013	12/13/2018	65		1	1	6
32	yes	2014-030	36	26041	2	2018	4	9/15/2006	1/18/2019	63		1	2	9
33	yes	2014-031	36	26159	5	2018	3	9/8/2003		70		2	2	9
43	yes	2014-041	36	26077	3	2018	4	12/9/2014	12/14/2018	63		2	4	5
45	yes	2014-043	36	26019	3	2018	3	12/9/2014		65		1	2	5
50	yes	2014-049	36	26161	5	2018	3	7/17/2013		54		1	2	6
51	yes	2014-051	36	26033	2	2018	3	10/15/2013		46		1	1	12
52	yes	2014-052	36	26159	2	2018	3	8/19/2013		77		1	2	2

Client database | dropdown lists | Tables | (+) | < | >