



How to submit a Friendly Phone Call Survey

1. Log into the Portal. (Written and video instructions on how to access the Portal are available on our website under Friendly Phone Calls).
2. Click on the My Events tab.
3. Click on New Friendly Phone Call (this will take you to the survey to complete for each client call. You will have to complete a new survey for each date that you have called a client).
4. Select the client you are completing the survey for from the drop down. If you believe the list is incorrect, please contact Eras.
5. Select the date you made contact or attempted to contact the client.
6. Select the length of time that best fits your call. If you did not reach the client, the default will be 15 minutes.
7. Select what type of contact you made with the client, whether you spoke with the client, left a voice message, or were unable to leave a voice message.
8. If you did not reach the client on the date selected, please enter the number of attempts you made. If you made attempts on different days, please complete a separate survey for each date.
9. Enter a brief overview of the call. This could include topics you discussed or just a general overview of the call.
10. If there are any concerns you feel staff should follow up on, please enter this information and staff will follow up.
11. Indicate if the client is still interested in receiving phone calls.
12. Click save and you will be brought back to the My Events tab.

If you are calling more than one client or are documenting several calls on different days, you will repeat this process for each client and each date.

If you submit a survey by mistake, please call us and we can correct or delete the entry.

If you have any questions, please do not hesitate to reach out. **We can be reached by phone: 414-488-6500 (Milwaukee) and 262-549-3348 (Waukesha) or by email at info@eras.org.**