

Call Log 101 (Health Coach Line Call Log).

Calls that come into any of our Coaching phone numbers and our attempts to call members back. I abbreviate it as “Call Log”. It is very important that it is filled in correctly as I use this often when any conflicts occur. It is very important that we are able to distinguish direct answers from messages left for us.

Please make sure to also keep your own paper notes of calls taken and returned.

Here is a reminder of the purpose of the Call Log. The Call log’s purpose is to track the traffic coming and going from our Health Coach Line (800.882.2109) and the other numbers that are routed through (the ACS line for example). All calls that come through and all calls that go out are documented.

- 1) Call comes in and is directly answered by a coach. Coach speaks with the member.
 - a. Fill in Columns A through H as indicated by column headings.
 - b. Column G would indicate **N** – because it was a direct answer, not a call back.
 - c. Column I is populated with the nature of the call
 - d. Column J is populated with the Date, **ONLY IF the member’s need was fully met.**
 - i. Sometimes direct answers need to be addressed by a different member of the team, or the answering coach needs to do some research and call them back. The Date is filled in when the Issue is **FULLY** resolved.
 - e. Column K is updated with the date and time with time zone that the 1st call back took place
 - f. Column L includes brief notes of the outcomes of the 1st call back attempt
 - g. Column M is updated with the date and time with time zone that the 2nd call back took place
 - h. Column N is updated with brief notes of the outcomes of the 2nd call back attempt
 - i. And so on
- 2) Member leaves a voice mail and coach is returning the call.
 - a. Fill in Columns A through F as indicated by column headings.
 - b. Column G would indicate **Y** – because a message was left and coach is calling back.
 - c. Column H is populated with the phone number left in the voice mail for call back
 - d. Column I is populated with the nature of the call
 - e. Column J is populated with the Date, **ONLY IF the member’s answered the call back and the need was fully met**
 - f. Column K is updated with the date and time with time zone that the 1st call back took place
 - g. Column L includes brief notes of the outcomes of the 1st call back attempt
 - h. Column M is updated with the date and time with time zone that the 2nd call back took place.
 - i. Column N is updated with brief notes of the outcomes of the 2nd call back attempt
 - j. And so on

The Call Log is **NOT** for documenting the initial calls made during Outreach campaigns. But it will document the outreach recipients call ins to the coach line in response to outreach.

The call log is not for documenting coaching activity (ie calls between coach and assigned coaching member). That is documented in CoachSpect.