How to Use the Daily Log

Each shift uses a new Daily Log sheet

Complete the top of the form:

- Record date, then encircle AM or PM (upper left of form)
- All MGs on the shift sign in (upper right)

Record these contacts during your shift:

1. Phone calls
2. Walk-ins
3. Letters
4. Emails
5. Began a Referral Form
6. Completed a Referral Form

(1–4) See explanation A, below

(5–6) See explanation B, below

A: Record the following in the Daily Log for # 1 through 4, above

a. Client name
  (1) One client is one contact even though s/he asked multiple questions
    (Record 2 or 3 of the more important, or interesting, questions)
  (2) One client is one contact even though you hang up to do research,
    then call back later during the same shift, or if client has multiple inquiries
b. Contact info (phone number, or street address, or email address)
  Note: Some people may refuse; if so, that's okay
c. Summary of the question(s)
d. Summary of the response(s)
e. Source of information, with page numbers and/or URL whenever possible

B: Record the following in the Daily Log for Referral Forms (#5 & 6, above)

(See Tab E for complete information about using Referral Forms)

a. If your shift began a Referral Form
  - Client name
  - Statement such as "Began Referral Form for <u>(client's name)</u>."
    (Note: Record all history on the Referral form)
b. If your shift completed a Referral Form
  - Client name
  - Statement such as "Completed Referral Form of <u>(date)</u>."
    (Note: Record diagnosis and all recommendations on Referral form)
c. If your shift received notification of the conclusion for a Referral which had
  been uploaded to the MG Referral Forum
  Full details in Tab E: *When and How to Use Referrals,* bottom of page 2

At the end of the shift

- Count the contacts and record at upper left on the front of the Daily Log sheet
- File the Daily Log sheet in Daily Log binder
  (Place it on top of the previous Daily Log)