

INSTRUCTIONS FOR MASTER CUMULATIVE RECORD rev: April 2015

- A. DATE:** The date of the client's visit (**or** the date you learn of the known results.)
- B. INITIALS & CASE #:** first initial, last initial, number (ex: Jane Doe =JD 7540 or JD 6508-3.) For insurance purposes, National needs a new case # for each new client or pregnancy. **Please see Intake instructions for full explanation on case numbers.**
- C. COUNSELOR:** Name of the counselor entering the information. If this is someone else's client, put that counselor's name after yours. (ex: Mary for Sue.)
- D. PURPOSE OF VISIT:** Choose one category. **1. Test**= new or former client coming for a pregnancy test, whether she also got stuff or not. *use all columns except M,N. **2. Practical Assistance**= New client coming for *stuff only*, or former client returning with a new pregnancy or baby, *needing stuff only*. *use all columns except I,J,K,M,N. **3. Counseling only**= New client (or former client returning with a new pregnancy or baby) coming now for *only to talk about her situation & does not need material assistance*. *use all columns except I,J,K,M,N. **4. Phone Counseling**= When *we make a call* to a client and have a longer conversation or give any advice, please enter any applicable information here. We do not need to count calls we make just to remind or confirm and appointment or just leaving a message. (If the *client makes the phone call* to us and we have a conversation or give counsel, this call will already be counted in the Phone Call Log as "Phone Counsel" and does not need to be also counted here.) **5. Email counsel**= This contact was only through e-mail. Fill in whatever applicable information you can. **6. PAS only**= she is *only* here to receive post abortion help. *use columns A,B,C,D,E,F,G,H,L for her first PAS visit; only A,B,C,D thereafter. **7. WBC** = attended PCC Women's Bible Class. For the first time *use all columns except I-K, subsequent WBC attendance use columns A-D,L,M. **8. Meet w/ Pastor**= client visited PCC for counseling with PCC Chaplain. *use columns A-D,N,O.
- E. REFERRAL:** Note how she found out about us, or whether she is a returning client.
- F. AGE:** Enter age category #; do not write in age.
- G. LIVING ARRANGEMENT:** Choose the category which best describes the case. A single parent living with her children only would be **#3 with children**. Explain "other" situations under **Comments**.
- H. RELIGION:** Enter her present or most recent affiliation. (other = Jewish, LDS, JW, Buddhist, Hindu, Wicca, etc.)
- I. TEST RESULT:** (**We no longer need to distinguish between a first test or a re-test.**)
- J & K. INTENTIONS BEFORE AND AFTER COUNSELING:** What were her plans if it turned out she was pregnant? If after counseling, she changed her mind, record the change. Quite often you don't know right away if her mind changed after talking with you. You may enter the same # in the "after" column. If you find out as you follow up that she has changed her mind, enter this information *on the date you find out*, don't go back and change the original recording of it. (In this situation use columns A, B, C, J, K only.)
- L. WITNESS:** For categories 1 and 2, choose the **one** that best describes your spiritual discussion, but not both. (If you check #1, Natl. assumes you **did not** present Law and Gospel. If you check #2, Natl. assumes you **did** talk about God's love.) For categories 3-9, check **any that apply**. Record this for all follow-up visits as well. **#7 = gave her a take-home Bible study book, DVD or lesson, #8= she brought back the completed Bible Study for review with a counselor.**

M. CBST ATTENDANCE: If you've entered a mom who attended Women's Bible Class, enter the number of children she brought to the Children's Bible Story Time here. You *may* also enter the number of children who heard a Bible story read by the receptionist while kids were waiting for mom during a regular appointment.

N. KNOWN RESULTS: This column applies more to follow-up information so you will leave this blank at the first visit. When you do find out any of these changes to her situation, record the information *on the date you find out*. Do not go back and change or add to the information you originally recorded when she first came in. *use columns A,B,C,N,O only. Put the date of the birth, marriage, etc. in the **Comments** column. Dates are important for our Statistician to know what to report to Natl. as they only want numbers for the current quarter, but we want to count all that we know of. Try to keep up-to-date so that information is recorded before statistics are sent in.

O. COMMENTS: Use this space any time you feel a need to give further details about any other column, or if there is information that doesn't fit one of the categories.

We should make an entry in the MCR for **every client visit**, and for other client contacts (i.e. phone calls) from which we learn information about columns J, K, N. **E-mail counseling and follow-up phone calls we make which involve any "advising" or longer conversations should be recorded on the MCR. Phone counseling when the client has called us gets counted on the Call Record sheet. (Calls when we've just left a message or confirmed an appointment need not be counted.** Statistics are totaled monthly, and reported to National quarterly.

Please start a new page at the beginning of each month to make it easier for our statistician.

This version of the Master Cumulative Record form is designed for use at the Saginaw PCC to coordinate with the information on National CLR's Quarterly Statistical Report. Its use has been OK'd by National. If you have questions about this form, call Mary Shaffer 989-835-5669. Or you may call the national office of Christian Life Resources 1-800-729-9535.

Revised 4-23-15