Referral Records and Reporting
SP5.12

Pre-Requisites

Users should have a basic understanding of the AIRS Taxonomy used to categorize primary services in the database, which is managed by the System Administrator/Resource Specialist. If a resource is not located or incorrect information is identified, Users should contact CommunityPoint@dupageco.org for assistance.

Set-Up

Providers may choose to customize their Service and Referral quicklists for easy access to most commonly requested services and resources. Contact the Help Desk for assistance, HMIS@dupageco.org.

Resource Data

Resource data can be located and shared through multiple means –

- **ResourcePoint** – Allows for a full resource record review and the ability to email the record. Provides email access to the listed resource contact person.

- **ClientPoint → Service Transactions→ Add Referrals** – Record client/household needs and referrals provided. Track the outcome of the referral. Report on needs (met or unmet) and referrals. Ability to send a summary of all referrals in an email to the client.

- **CommunityPoint** (www.dupagecris.org) – Public access point to the resource database. Ability to print (single record or single page search result), email or text resources (individual records). Allows for management of own resource group (commonly searched resources). Ease in reporting updates/incorrect data to Resource Specialist for review and correction; improving the accuracy and timeliness of record updates. Resource Groups and data corrections require free account access.

Referrals

Referrals can be recorded in CallPoint or ClientPoint.

Current Call	Previous Calls (0)	Client Information	Service Transactions

1. Add Referral
2. Select up to 5 Needs from the Service Code Quicklist or use the Service Code Look-Up
3. Select Add Terms/Add Terms & Go To Search Results
4. Select the Referral Provider(s) from the Referral Provider Quicklist or from the Search Results.

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5. Search results can be filtered by physical location or service area, in addition to providers that use ServicePoint
6. Results will show the number of needs selected that this provider has a service for
7. The Needs Referral Date will default to the system date and time
8. *Referral Ranking leave at Select

9. Follow-up information is an optional feature. A follow-up can be scheduled for yourself or another User, so that a reminder will appear on their Home Page Dashboard to follow-up on this particular case at a later time.
a. Enter the date that you/staff would like to follow-up with the client by
b. Select the provider and User to complete the follow-up. Users are listed by the provider that their User log-in is created under.
10. 'Check to notify ServicePoint Providers by Email' requires provider set-up and Recipient access to reporting. Users are encouraged to also contact the programs directly.
11. Mark what Need is being referred to which of the selected providers, and add any additional details such as amount needed.
12. A summary of the provided referrals may be sent to the client by selecting 'Send Summary' and entering the recipient's email address.
13. Save All

Reporting

There are several reports pre-built for reporting on referrals and needs. It is important to first identify your program's reporting needs in order to select the correct report(s). In addition, be sure to identify your reporting parameters (provider, report start date, report end date, etc.) prior to running a report. Most reports have some type of report filtering that must be answered correctly in order to pull the data that you are looking for.

- Home Page Dashboard Counts Reports give quick client counts with access to download the list of clients for each report. These reports are generated right in ServicePoint showing live data.

  o Incoming Referrals (Outstanding, Closed, All)

  o Outgoing Referrals (Outstanding, Closed, All)

- Canned Reports are available through the Report Module and are generated right in ServicePoint showing live data.

  o Needs Report – Report is filtered on provider and Need Date, and optional filter include Need Code. Results include client demographics and Need Counts by type and status (Pending, Fully Met, Partially Met, Unmet, Not Set).

  o Referrals Report – Report is filtered on incoming or outgoing referrals, and on the referral status (outstanding, closed, or both).   Results include referral date, client name and ID, Need, Referred by/to, outcome and notes. Referral outcomes can be updated directly through the report too!

- Advanced Reporting Tool (ART) requires a Viewer License to run available report. These reports are run outside of ServicePoint and will show data as of the last data upload. Typically the last upload is the day prior.

  o 1303-Referral Report – Charts the number of referrals by need, referrals by need category, referrals by the referred to provider, and referrals by caller type.

- ART Dashboard Reports are reports that offer quick counts or charts on live data where the data sets are small enough to run on your Home Page Dashboard. These reports can also be run directly through ART.

  o D002 – Referrals Sent in the past week – Provides a chart measuring the number of referrals sent by day for the past week.

  o D003 – Referrals Received in the past week - Provides a chart measuring the number of referrals sent by day for the past week.