

ART Gallery Report 0361

Expedience of Entry, Service, Referral

Contents

| | |
|--|----|
| 1. INTRODUCTION: | 3 |
| 2. REPORT INSTRUCTIONS AND PROMPTS:..... | 3 |
| 3. DESCRIPTION AND LAYOUT: | 5 |
| 3.1. Tab A – Summary..... | 5 |
| 3.2 Tab B – Entry Creation | 6 |
| 3.3 Tab C – Service Creation | 7 |
| 3.4 Tab D – Service Delivery First | 8 |
| 3.5 Tab E – Service Delivery All..... | 9 |
| 3.6 Tab F – Service After Referral | 10 |
| 3.6 Tab G – Additional Information..... | 11 |
| 4. INPUT CONTROLS: | 12 |
| 4.1 Tab B – Entry Creation | 12 |
| 4.2 Tab C – Service Creation | 13 |
| 4.3 Tab D – Service Delivery First | 14 |
| 4.4 Tab E – Service Delivery All..... | 15 |
| 4.5 Tab F – Service After Referral | 16 |
| 5. ALERTERS: | 16 |
| 5.1 Tab E – Service Delivery All..... | 16 |
| 5.1 Tab F – Service After Referral | 16 |
| 6. DIMENSIONS USED: | 17 |
| 6.1 Dimensions Common to All Tabs..... | 17 |
| 6.2 Tab A – Summary..... | 17 |
| 6.3 Tab B – Entry Creation..... | 17 |
| 6.4 Tab C – Service Creation | 17 |
| 6.5 Tab D – Service Delivery First | 17 |
| 6.6 Tab E – Service Delivery All..... | 18 |
| 6.7 Tab F – Service After Referral | 18 |

7. TECHNICAL INFORMATION:..... 18

7.1. How the data are pulled:..... 18

7.2. Technical notes related to use of Input Controls: 18

7.3. Modification options: 18

8. MAPPING OBJECTS: 19

9. REVISION HISTORY:..... 20

1. INTRODUCTION:

The Expedience of Entry, Service, and Referral report highlights and summarizes a number of useful aspects of the service delivery process. The report explores not only what is going on within your program, but what is going on between your program and the other programs with whom you collaborate. Thus the report is useful not only for program management, but for Coordinated Assessment as well. Explore not only data entry timeliness, but also timeliness of service delivery.

These reports can be run by case managers to see how quickly their clients are receiving services, for those interested at the program level in the timeliness of data entry and service delivery, and Executive Directors and funders with a stake in the processes of data entry timeliness and Coordinated Assessment. Note: Depending on the openness of your implementation, some stakeholders may be limited in their view of the data.

Use of this report can be specified in the narrative section of the HMIS APR as part of a plan to ensure data entry timeliness. The report can be run as specified by that plan. The report should also be run as needed to ensure the referral process for Coordinated Assessment is proceeding as desired.

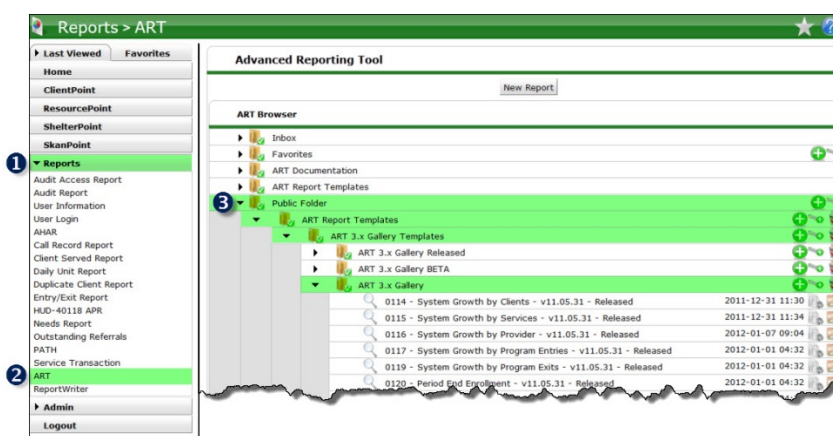
Prerequisites and workflow requirements: This report requires the use of entry-exits for the programs included in the report and the use of different providers for those sending the referrals and those receiving the referrals.

Compatibility and system requirements: This report requires ServicePoint 5x and ART 3x.

2. REPORT INSTRUCTIONS AND PROMPTS:

The easiest way to start using this report is to navigate to the automapper. This is a folder that has the reports automatically mapped to your site, so that you don't have to map them yourself. You can navigate to the automapper as shown in Figure 2.1, below:

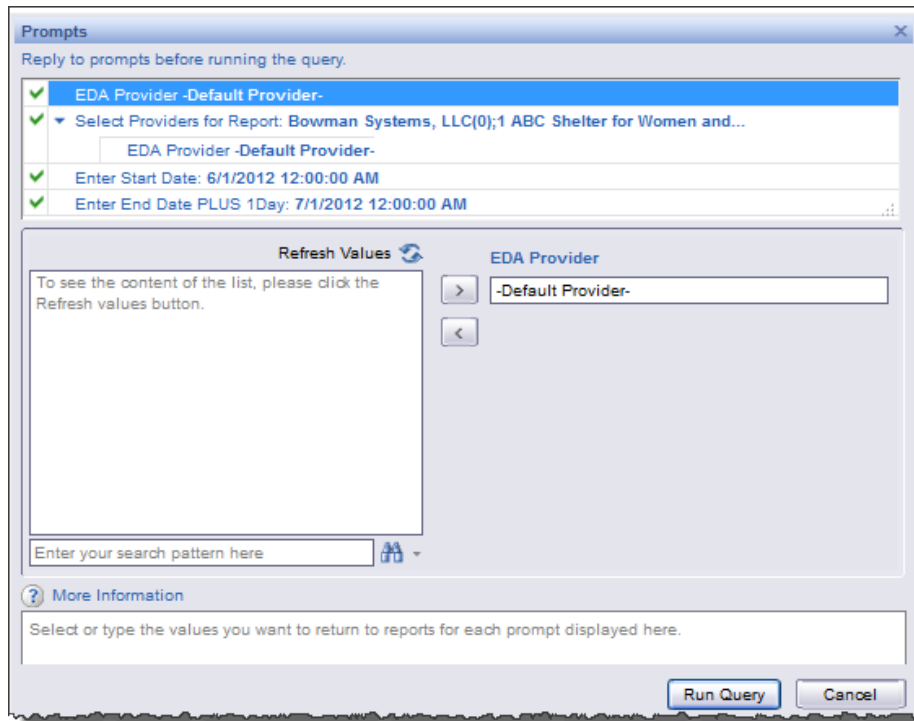
Figure 2.1



Requests for additional information concerning the report function/design should be directed to Bowman Systems' Customer Support Specialist (CSS) staff.

How to run: Upon opening the report, the User will be prompted (see Figure 2.2) to specify parameters which control the data returned by the report. Once the User has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The User should then single-click the “Refresh Data” button to generate the report.

Figure 2.2



The user prompts contained in this report are:

1. **EDA Provider:** The user should select the EDA provider to run the report as, or leave it at the "-Default Provider-" if the default has the appropriate security level.
2. **Select Provider(s):** Click the “refresh list” icon and wait for the left window to refresh. Now select the providers to include by highlighting them in the left window and moving them into the right window using the right selection arrow
3. **Enter Start Date:** The user should type in, or select from the calendar, the start date of the report.
4. **Enter End Date PLUS 1 Day:** The user should type in, or select from the calendar, the end date for the report plus 1 day. For example, if the desired End Date is January31, 2013 then February 1, 2013 should be entered/selected.

3. DESCRIPTION AND LAYOUT:

3.1. Tab A – Summary

This tab contains the summary information for Entry, Service and Referral expedience.

Figure 3.1

| Expedience of Entry, Service, and Referral Summary | |
|---|--------|
| Report Dates: 6/1/12 - 6/30/12 | |
| Expedience of Entry Creation: What is the length of time between clients entering the program and the record creation in ServicePoint? | |
| Overall: | |
| Average: | 1.93 |
| Median: | 1 |
| Same Provider: | |
| Average: | - |
| Median: | - |
| Different Provider: | |
| Average: | 1.93 |
| Median: | 1 |
| Expedience of Service Creation: What is the length of time between clients receiving a service and the record creation in ServicePoint? | |
| Overall: | |
| Average: | 10.61 |
| Median: | 7 |
| Same Provider: | |
| Average: | 7.35 |
| Median: | 1 |
| Different Provider: | |
| Average: | 10.61 |
| Median: | 7 |
| Expedience of Service Delivery After Entry: What is the length of time between clients entering a program and receiving a service? | |
| Overall: | |
| Average: | 50.98 |
| Median: | 0 |
| Same Provider: | |
| Average: | 0.08 |
| Median: | 0 |
| Different Provider: | |
| Average: | 0 |
| Median: | 0 |
| Censored Observation (No Svcs): | |
| Average: | 407.6 |
| Median: | 400 |
| Expedience of Service Delivery After Referral: What is the length of time between clients receiving a referral and receiving a service? | |
| Overall: | |
| Average: | 373.08 |
| Median: | 406 |

Section Explanations:

- **Expedience of Entry Creation:** This section displays the Average and Median difference in days between the date a Program Entry is added to the system and the Start Date selected when the Entry/Exit is created. The overall average is given along with the average for Same Provider and Different Providers.
- **Expedience of Service Creation:** This section displays the Average and Median difference in days between the date a service is added to the system and the Start Date selected when the service is created. The overall average is given along with the average for Same Provider and Different Providers.
- **Expedience of Service Delivery After Entry:** This section displays the Average and Median difference in days between the date a Program Entry is added to the system and the date the first service is created. The overall average is given along with the average for Same Provider and Different Providers and includes services provided as well as where the service has not yet been provided (Censored Observation).
- **Expedience of Service Delivery After Referral:** This section displays the overall Average and Median difference in days between the date a referral is created and a service is provided for that referral.

3.2 Tab B – Entry Creation

This tab contains detail information about the expedience of Entry Creation.

Figure 3.2

| Expedience of Entry, Service, and Referral | | | | | | | | |
|--|----------------------|----------|------------------------------------|------------------|---------------|---|---------------|-----|
| Expedience of Entry Creation | | | | | | | | |
| Report Dates: 6/1/12 - 6/30/12 | | | | | | | | |
| Client Id 37 | Client Unique Id | EE Id 40 | Provider Creating | User Creating EE | Date Added | EE Provider Id | Entry Date | Lag |
| 21312 | twym091019541600a652 | 461842 | Ypq Jbgonwxu Vtwp zI Kwznyvkh(141) | Nftnw Yebt(2716) | 6/5/2012 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzm (2757) | 6/4/2012 | 1 |
| 117019 | oqom06091969o642s530 | 464121 | Ypq Jbgonwxu Vtwp zI Kwznyvkh(141) | Nftnw Yebt(2716) | 6/29/2012 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzm (2757) | 6/28/2012 | 1 |
| 189256 | bhfm11051975b650b600 | 464122 | Ypq Jbgonwxu Vtwp zI Kwznyvkh(141) | Nftnw Yebt(2716) | 6/29/2012 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzm (2757) | 6/28/2012 | 1 |

Column Explanations:

- **Client Id:** This column displays all of the Client Ids for the clients included in the report range.
- **Client Unique Id:** This column displays all of the Client Unique Ids for the clients included in the report range.
- **EE Id:** This column displays the Entry/Exit Id assigned to each client for the report range. It is possible for a single client to have more than one Entry/Exit in the report range.
- **Provider Creating:** This column displays the name of the provider creating the Entry/Exit.
- **User Creating EE:** This column displays the name of the user who created the Entry/Exit.
- **Date Added:** This column displays the date the Entry/Exit was added to the system.
- **EE Provider Id:** This column displays the Entry/Exit Provider Id.
- **Entry Date:** This column displays the Entry Date selected when the user created the Entry/Exit.
- **Lag:** This column displays the difference in days between the Entry Date selected and the Date Added.

3.3 Tab C – Service Creation

This tab contains detail information about the expedience of Service Creation.

Figure 3.3

| Expedience of Entry, Service, and Referral | | | | | | | | |
|--|----------------------|------------|--|-----------------------|------------|--|------------|-----|
| Expedience of Service Creation | | | | | | | | |
| Report Dates: 6/1/12 - 6/30/12 | | | | | | | | |
| Client Id | Client Unique Id | Service Id | Provider Creating | User Creating Service | Date Added | Service Provider Id | Start Date | Lag |
| 204 | khrf05232002k650b650 | 845 | Uaysqrhnx Odovfi Uxzf Tjlsiqzpqg QVN(8326) | Tbwlwelp Rdfz(2883) | 6/18/2012 | 1 ABC Shelter for Women and Families(8325) | 6/15/2012 | 3 |
| 8456 | kyxm12051998k150b650 | 3452885 | Uaysqrhnx Odovfi Uxzf Tjlsiqzpqg QVN(8326) | Tbwlwelp Rdfz(2883) | 6/18/2012 | 1 ABC Shelter for Women and Families(8325) | 6/15/2012 | 3 |
| 13051 | lsxf08091957300b630 | 3434980 | Uaysqrhnx Odovfi Uxzf Tjlsiqzpqg QVN(8326) | Khryblwlp Ytpoc(2425) | 6/6/2012 | 1 ABC Shelter for Women and Families(8325) | 6/5/2012 | 1 |
| 15058 | twym09101954f600a652 | 3431506 | Ypq Jbgonwxxu Vfwp zi Kwznyiwh(141) | Nfnw Yeb(2716) | 6/5/2012 | Ypq Jbgonwxxu Vfwp zi Kwznyiwh(141) | 6/4/2012 | 1 |
| 21312 | | | | | | | | |

Column Explanations:

- **Client Id:** This column displays all of the Client Ids for the clients included in the report range.
- **Client Unique Id:** This column displays all of the Client Unique Ids for the clients included in the report range.
- **Service Id:** This column displays the Service Id assigned to each client for the report range. A client may have more than one service displayed.
- **Provider Creating:** This column displays the name of the provider creating the Service.
- **User Creating Service:** This column displays the name of the user who created the Service.
- **Date Added:** This column displays the date the Service was added to the system.
- **Service Provider Id:** This column displays the Service Provider Id. Only services added during the Entry/Exit date range are included in the report.
- **Start Date:** This column displays the Start Date selected when the user created the Service.
- **Lag:** This column displays the difference in days between the Start Date selected and the Date Added.

3.4 Tab D – Service Delivery First

This tab contains detail information about the expedience of service delivery after program entry for the first service provided only.

Figure 3.4

| Expedience of Entry, Service, and Referral | | | | | | | | | |
|--|----------------------|-------------|---|------------------|---------------|---|-----------------------|--------------------|-----|
| Expedience of Service Delivery After Entry (First Service After Entry) | | | | | | | | | |
| Report Dates: 6/1/12 - 6/30/12 | | | | | | | | | |
| First Service After Entry | | | | | | | | | |
| Client Id 37 | Client Unique Id | EE Id 40 | EE Provider | User Creating EE | EE Entry Date | Service Provider | User Creating Service | Service Start Date | Lag |
| 21312 | hwym09101954f600a652 | 461842 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzmi(2757) | Nftnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzmi(2757) | Nftnw Yebt(2716) | 6/4/2012 | 0 |
| 117019 | oqpm06091969c642c530 | 464121 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzmi(2757) | Nftnw Yebt(2716) | 6/28/2012 | Ypq Jbgonwixu Vhwp zl Kwzryvfk(141) | Nftnw Yebt(2716) | 6/28/2012 | 0 |
| 189256 | bhfm11051975b650b600 | 464122 | Ppj Puljzgaqd Bvyy db Rwiseolypu Yxidnaldv Tmvzmi(2757) | Nftnw Yebt(2716) | 6/28/2012 | Ypq Jbgonwixu Vhwp zl Kwzryvfk(141) | Nftnw Yebt(2716) | 6/28/2012 | 0 |

Column Explanations:

- **Client Id:** This column displays all of the Client Ids for the clients included in the report range.
- **Client Unique Id:** This column displays all of the Client Unique Ids for the clients included in the report range.
- **EE Id:** This column displays the Entry/Exit Id assigned to each client for the report range. It is possible for a client to have more than one entry/exit per report period.
- **EE Provider:** This column displays the name of the provider creating the Entry/Exit.
- **User Creating EE:** This column displays the name of the user who created the Entry/Exit.
- **EE Entry Date:** This column displays the date the Entry/Exit was added to the system.
- **Service Provider:** This column displays the Service Provider of the first service after program entry.
- **User Creating Service:** This column displays the name of the user who created the Service.
- **Service Start Date:** This column displays the Entry date selected when the user created the Service or the last date of the reporting period if no service was provided (Censored Observation).
- **Lag:** This column displays the difference in days between the Service Start Date selected and the Entry/Exit Entry Date.

3.5 Tab E – Service Delivery All

This tab contains detail information about the expedience of service delivery after program entry for all services provided.

Figure 3.5

| Expedience of Entry, Service, and Referral | | | | | | | | | |
|---|----------------------|-------------|---|------------------|---------------|--|-----------------------|--------------------|-----|
| Expedience of Service Delivery After Entry (All Services After Entry) | | | | | | | | | |
| Report Dates: 6/1/12 - 6/30/12 | | | | | | | | | |
| All Services After Entry | | | | | | | | | |
| Client Id 35 | Client Unique Id | EE Id 35 | EE Provider | User Creating EE | EE Entry Date | Service Provider | User Creating Service | Service Start Date | Lag |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/5/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/6/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/7/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/8/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/9/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/10/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/11/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/12/2012 | 0 |
| | twym09101954t600a652 | | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/13/2012 | 0 |
| 21312 | twym09101954t600a652 | 461842 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Nfnw Yebt(2716) | 6/4/2012 | Ppj Puljzgaqd Bvyy db Rwsseolypu Yxidnaldv Tmvmzm(2757) | Fyyysbj Ehdovs(2146) | 6/13/2012 | 0 |

Column Explanations:

- **Client Id:** This column displays all of the Client Ids for the clients included in the report range.
- **Client Unique Id:** This column displays all of the Client Unique Ids for the clients included in the report range.
- **EE Id:** This column displays the Entry/Exit Id assigned to each client for the report range.
- **EE Provider:** This column displays the name of the provider creating the Entry/Exit.
- **User Creating EE:** This column displays the name of the user who created the Entry/Exit.
- **EE Entry Date:** This column displays the date the Entry/Exit was added to the system.
- **Service Provider:** This column displays the Service Provider.
- **User Creating Service:** This column displays the name of the user who created the Service.
- **Service Start Date:** This column displays the Entry date selected when the user created the Service.
- **Lag:** This column displays the difference in days between the Service Start Date selected and the Entry/Exit Entry Date.

Note: The service that is bolded is the First Service after entry and the one used to calculate the lag.

3.6 Tab F – Service After Referral

This tab contains detail information about the expedience of service delivery after a referral is created.

Figure 3.6

| Expedience of Entry, Service, and Referral Expedience of Service Delivery After Referral Report Dates: 6/1/12 - 6/30/12 | | | | | | | | | |
|---|-----------------------------|----------------|----------------------------|---|------------------|---|----------------------------------|---------------------|----------|
| Client Id 42 | Client Unique Id | Svs Need Id 51 | Service Code Description | Referral Provider | Referral Date | Service Provider | User Creating Service / Referral | Svs/Cens Start Date | Lag |
| 21312 | <i>twym091019541600a652</i> | 3523448 | Medical Expense Assistance | Cejfgmp Ngltvmbdo og Rhaxrgtha(7908) | 6/28/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 392 |
| 120611 | cyOf12211960c640d553 | 3466024 | Medical Expense Assistance | <i>Nahfkny Xdhpoe Erdjnt du Bqtvovqjr (7919)</i> | 6/7/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 413 |
| | cyOf12211960c640d553 | 3513429 | Medical Expense Assistance | <i>Croxzv Sfttayvi em Plwzygcjd(7911)</i> | 6/7/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 413 |
| 149239 | <i>asMf03201991a420e330</i> | 3481111 | Medical Expense Assistance | <i>Nahfkny Xdhpoe Erdjnt du Bqtvovqjr (7919)</i> | 6/14/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 406 |
| 149860 | <i>epvm09261963e652b200</i> | 3467139 | Medical Expense Assistance | <i>Croxzv Sfttayvi em Plwzygcjd(7911)</i> | 6/11/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 409 |
| 172899 | <i>tjm0630198714001000</i> | 3447237 | Medical Expense Assistance | <i>Croxzv Sfttayvi em Plwzygcjd(7911)</i> | 6/1/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 419 |
| 176733 | lltm11261982i000a164 | 3473941 | Rent Payment Assistance | Qn. Rtardif ft Kapp Voxclj yi Rtmxc Wft (2542) | 6/19/2012 | | Kmgu Ynwttwafahon(305) | 7/25/2013 | 2 |
| | lltm11261982i000a164 | | Rent Payment Assistance | | | 1 The Greater Green Bay Shelter Program (8122) | Kmgu Ynwttwafahon(30 | 8/21/2012 | 2 |
| 194234 | <i>lrym09181981f500c450</i> | 3515655 | Medical Expense Assistance | <i>Croxzv Sfttayvi em Plwzygcjd(7911)</i> | 6/28/2012 | | Jpj Ebigtj(1552) | 7/25/2013 | 392 |

Column Explanations:

- **Client Id:** This column displays all of the Client Ids for the clients included in the report range.
- **Client Unique Id:** This column displays all of the Client Unique Ids for the clients included in the report range.
- **Svs Need Id:** This column displays the Service Need Id for each referral or service provided. A client may have more than one Service Need Id for the report period. Data is grouped by the Service Need Id.
- **Service Code Description:** This column displays the Service Code Description for each referral or service provided.
- **Referral Provider:** This column displays the name of the provider making the referral.
- **Referral Date:** This column displays the date of the referral.
- **Service Provider:** This column displays the Service Provider for the service provided based on the referral.
- **User Creating Service/Referral:** This column displays the name of the user who created the Service/Referral.
- **Service/Cens Start Date:** This column displays the date of the service provided or the Censored Observation (indicator that there is no service provided) for the last date of the reporting period.
- **Lag:** This column displays the difference in days between the Referral Date and the Service Start Date or the last date of the reporting period of no service was provided

Note: The first referral for a service is bolded. The first service for a referral is bolded and italicized.

3.6 Tab G – Additional Information

This tab contains additional information regarding prompts used in the report and provides a listing of providers, client counts and Entry Exit Counts.

Figure 3.6

| Expedience of Entry, Service, and Referral Summary | | | |
|--|--|--|-----------|
| Report Dates: 6/1/12 - 6/30/12 | | | |
| User Prompt Field | | Value Selected | |
| EDA Provider: | | -Default Provider- | |
| Select Providers for Report: | | Bowman Systems, LLC(0); 1 ABC Shelter for Women and Families(8325); 1 10th Street Shelter(2055); Ypq Jbgorwxu Vfwz zi Kwznyvfk(141); Qn. Rtdrtf ft Kqpg Voxclj yt Rfmx Wft(2542) | |
| Enter Start Date: | | 6/1/2012 | |
| Enter End Date PLUS 1Day: | | 7/1/2012 | |
| Expedience of Entry Creation: | | | |
| Entry Exit Provider Creating | | Count Clients | Count EEs |
| Ypq Jbgorwxu Vfwz zi Kwznyvfk(141) | | 37 | 40 |
| Entry Exit Provider | | Count Clients | Count EEs |
| Ppj Puijzgaqd Bvyy db Rweolypu Yxldnaldv Tmvzm(2757) | | 37 | 40 |
| Expedience of Service Creation: | | | |
| Service Provider Creating | | Count Clients | Count EEs |
| Qn. Rtdrtf ft Kqpg Voxclj yt Rfmx Wft(2542) | | 2 | 2 |

Column Explanations:

- Column 1:** The first column provides the name of the Provider Creating or the Provider for Entry/Exits, Services and Referrals Created. Data for each tab may be pulled in for different providers. For each tab in the report providers may appear in multiple tables due to the way data is pulled for the report. For additional information on the way data is pulled in refer to Technical Notes section.
- Count Clients:** This column provides the count of clients in the selected date range.
- Count EE's:** This column displays the count of Entry/Exits in the selected date range. This number may be higher than the client count as a single client may have more than one entry exit.

4. INPUT CONTROLS:

4.1 Tab B – Entry Creation

Figure 4.1

The screenshot shows a dialog box titled "Input Controls - Tab B - Entry Creation". At the top left is a "New" button with a plus icon, and at the top right is a "Reset" button. Below these are three filter sections. The first section, "Provider Same/Different", has three radio buttons: "All values" (selected), "Diff", and "Same". The second section, "When Dated?", has three radio buttons: "All values" (selected), "Back Dated", and "Same Date". The third section, "User Creating Entry Exit", is a dropdown menu currently showing "All values".

Input controls include the following:

- 1) **Provider Same/Different** – this input control allows the user to limit the data set to reflect whether the EE Provider Creating was the same or different from the EE Provider Id.
- 2) **When Dated?** – this input control allows the user to limit the data set to all values, only back dated values or values on the same date
- 3) **User Creating Entry Exit** – this input control allows the user to filter data to the user creating the Entry Exit.

4.2 Tab C – Service Creation

Figure 4.2

Input Controls - Tab C - Service Creation

New Reset

Provider Same/Different

All values
 Diff
 Same

When Dated?

All values
 Back Dated
 Same Date

User Creating Service

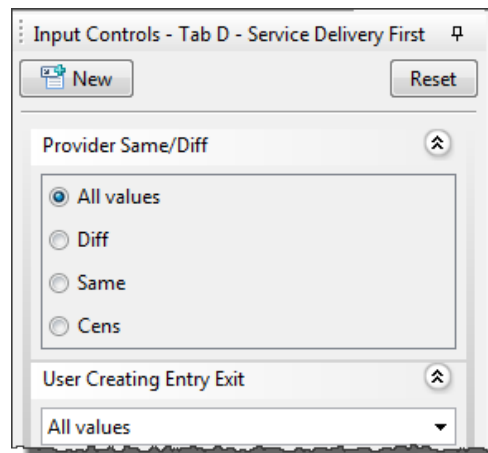
All values

Input controls include the following:

- 1) **Provider Same/Different** – this input control allows the user to limit the data set to reflect whether the Provider Creating was the same or different from the Service Provider Id.
- 2) **When Dated?** – this input control allows the user to limit the data set to all values, only back dated values or values on the same date
- 3) **User Creating Service** – this input control allows the user to filter data to the user creating the service.

4.3 Tab D – Service Delivery First

Figure 4.3



Input controls include the following:

- 1) **Provider Same/Different** – this input control allows the user to limit the data set to reflect whether the EE Provider was the same or different from the Service Provider or for the Censored Observation (no service provided).
- 2) **User Creating Entry Exit** – this input control allows the user to filter data to the user creating the entry exit. Note: User Creating Service is intentionally omitted from this tab for technical reasons.

4.4 Tab E – Service Delivery All

Figure 4.4

Input Controls - Tab E - Service Delivery All

New Reset

Provider Same/Diff

All values
 Diff
 Same

User Creating Entry Exit

All values

User Creating Service

All values

Display Only First Service

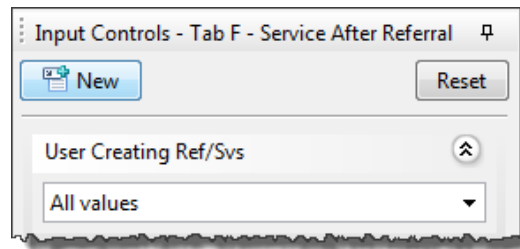
All values
 First Service

Input controls include the following:

- 1) **Provider Same/Different** – this input control allows the user to limit the data set to reflect whether the Provider Creating was the same or different from the Service Provider Id.
- 2) **User Creating Entry Exit** – this input control allows the user to filter data to the user creating the Entry Exit.
- 3) **User Creating Service** – this input control allows the user to filter data to the user creating the service.
- 4) **Display Only First Service** – this input control allows the user to limit the data displayed to only the first service provided.

4.5 Tab F – Service After Referral

Figure 4.5



Input controls include the following:

- 1) **User Creating Ref/Svs** – this input control allows the user to filter data to the user creating the Entry Exit.

5. ALERTERS:

5.1 Tab E – Service Delivery All

The service that is bolded is the First Service after entry and the one used to calculate the lag.

5.1 Tab F – Service After Referral

The first referral for a service is bolded. The first service for a referral is bolded and italicized.

6. DIMENSIONS USED:

6.1 Dimensions Common to All Tabs

| | |
|------------------------------|---|
| Additional Dimensions | Client Uid, Client Unique Id, Client Inactive |
|------------------------------|---|

6.2 Tab A – Summary

| | |
|------------------------------|--|
| Additional Dimensions | Entry Exit Uid, Entry Exit Entry Date, Entry Exit Exit Date, Entry Exit Provider Id, Entry Exit Date Added, Entry Exit Provider Creating, Entry Exit User Creating, Right Now, Entry Exit Inactive, Service Uid, Service Provide Start Date, Service Provide End Date, Service Provide Provider, Service Date Added, Service Provider Creating, Service Code Description, Service User Creating, Service Provided, Service Inactive, Service Refer Date, Service Referto Provider, Service Need Id |
|------------------------------|--|

6.3 Tab B – Entry Creation

| | |
|------------------------------|--|
| Additional Dimensions | Entry Exit Uid, Entry Exit Entry Date, Entry Exit Exit Date, Entry Exit Provider Id, Entry Exit Date Added, Entry Exit Provider Creating, Entry Exit User Creating, Right Now, Entry Exit Inactive |
|------------------------------|--|

6.4 Tab C – Service Creation

| | |
|------------------------------|---|
| Additional Dimensions | Service Uid, Service Provide Start Date, Service Provide End Date, Service Provide Provider, Service Date Added, Service Provider Creating, Service Code Description, Service User Creating, Service Provided, Service Inactive |
|------------------------------|---|

6.5 Tab D – Service Delivery First

| | |
|------------------------------|---|
| Additional Dimensions | Entry Exit Uid, Entry Exit Entry Date, Entry Exit Exit Date, Entry Exit Provider Id, Entry Exit Date Added, Entry Exit Provider Creating, Entry Exit User Creating, Right Now, Entry Exit Inactive, Service Uid, Service Provide Start Date, Service Provide End Date, Service Provide Provider, Service Date Added, Service Provider Creating, Service Code Description, Service User Creating, Service Provided, Service Inactive |
|------------------------------|---|

6.6 Tab E – Service Delivery All

| | |
|------------------------------|---|
| Additional Dimensions | Entry Exit Uid, Entry Exit Entry Date, Entry Exit Exit Date, Entry Exit Provider Id, Entry Exit Date Added, Entry Exit Provider Creating, Entry Exit User Creating, Right Now, Entry Exit Inactive, Service Uid, Service Provide Start Date, Service Provide End Date, Service Provide Provider, Service Date Added, Service Provider Creating, Service Code Description, Service User Creating, Service Provided, Service Inactive |
|------------------------------|---|

6.7 Tab F – Service After Referral

| | |
|------------------------------|--|
| Additional Dimensions | Entry Exit Uid, Entry Exit Entry Date, Entry Exit Exit Date, Entry Exit Provider Id, Entry Exit Date Added, Entry Exit Provider Creating, Entry Exit User Creating, Right Now, Entry Exit Inactive, Service Uid, Service Provide Start Date, Service Provide End Date, Service Provide Provider, Service Date Added, Service Provider Creating, Service Code Description, Service User Creating, Service Provided, Service Inactive, Service Refer Date, Service Referto Provider, Service Need Id |
|------------------------------|--|

7. TECHNICAL INFORMATION:

7.1. How the data are pulled:

This report utilizes four queries, all of which are based on the Client Universe.

- a) EE query: This query pulls active clients with active Entry/Exits by selected providers that overlap the specified timeframe. This query pulls data either by the Provider Creating or the EE Provider Id.
- b) Svs query: This query pulls active clients with active Services by selected providers that overlap the specified timeframe. This query pulls data either by the Service Provider Creating or the Service Provider Id.
- c) Referral query: This query pulls active clients with active Referrals by selected providers that overlap the specified timeframe. This query pulls either by the Referral Provider or by the Service Provider. Of those referrals, any service in the same Need Id are all pulled in.
- d) After EE: This query pulls from the Entry/Exits in the EE query and displays active services by active clients where the Service occurs within the Entry/Exit dates.

7.2. Technical notes related to use of Input Controls:

- a) It is recommended that Input Controls be applied individually. Combining input controls in this report may result in limiting the results in a manner that is not intended.
- b) Tab D (Service Delivery First) does not contain both user creating controls. These are located on Tab E (Service Delivery All).

7.3. Modification options:

Modifications to this report are not recommended.

8. MAPPING OBJECTS:

A listing of the report objects and their source universe and source folder is provided below.

| QUERY NAME | OBJECT TYPE | FIELD NAME | LOCATION |
|------------------------------------|--------------------------|-------------------------------------|-------------------------------------|
| EE Client Universe: _u | Result Objects | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Entry Exit Uid | Clients / Entry Exit (outer) folder |
| | | Entry Exit Entry Date | Clients / Entry Exit (outer) folder |
| | | Entry Exit Exit Date | Clients / Entry Exit (outer) folder |
| | | Entry Edit Provider id | Clients / Entry Exit (outer) folder |
| | | Entry Exit Date Added | Clients / Entry Exit (outer) folder |
| | | Entry Exit Provider Creating | Clients / Entry Exit (outer) folder |
| | | Entry Exit User Creating | Clients / Entry Exit (outer) folder |
| | | Right Now | Date objects / Right Now folder |
| | Filter Objects | Client Inactive | Clients folder |
| Entry Exit Inactive | | Clients / Entry Exit (outer) folder | |
| SVS Client Universe: _u | Result Objects: | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Service Uid | Clients / Services (outer) folder |
| | | Service Provide Start Date | Clients / Services (outer) folder |
| | | Service Provide End Date | Clients / Services (outer) folder |
| | | Service Provide Provider | Clients / Services (outer) folder |
| | | Service Date Added | Clients / Services (outer) folder |
| | | Service Provider Creating | Clients / Services (outer) folder |
| | | Service Code Description | Clients / Services (inner) folder |
| | | Service User Creating | Clients / Services (inner) folder |
| | Filter Objects: | Client Inactive | Clients folder |
| | | Service Provided | Clients / Services (outer) folder |
| | | Service Inactive | Clients / Services (outer) folder |
| | | | |
| After EE Client Universe: _u | Result Objects | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Entry Exit Uid | Clients / Entry Exit (outer) folder |
| | | Entry Exit Entry Date | Clients / Entry Exit (outer) folder |
| | | Entry Exit Exit Date | Clients / Entry Exit (outer) folder |
| | | Entry Edit Provider id | Clients / Entry Exit (outer) folder |
| | | Entry Exit User Creating | Clients / Entry Exit (outer) folder |
| | | Service Uid | Clients / Services (outer) folder |
| | | Service Provide Start Date | Clients / Services (outer) folder |
| | | Service Provide End Date | Clients / Services (outer) folder |
| | | Service Provide Provider | Clients / Services (outer) folder |
| | | Service User Creating | Clients / Services (outer) folder |
| | Service Code Description | Clients / Services (outer) folder | |
| | Filter Objects | Client Inactive | Clients folder |
| | | Service Inactive | Clients / Services (outer) folder |
| Service Provided | | Clients / Services (outer) folder | |

| | | | |
|------------------------------------|--------------------|----------------------------|-----------------------------------|
| Referral Client Universe: _u | Result Objects: | Client Uid | Clients folder |
| | | Client Unique Id | Clients folder |
| | | Service Uid | Clients / Services (outer) folder |
| | | Service Provide Start Date | Clients / Services (outer) folder |
| | | Service Provide End Date | Clients / Services (outer) folder |
| | | Service Provide Provider | Clients / Services (outer) folder |
| | | Service Date Added | Clients / Services (outer) folder |
| | | Service Provider Creating | Clients / Services (outer) folder |
| | | Service Code Description | Clients / Services (outer) folder |
| | | Service User Creating | Clients / Services (outer) folder |
| | | Service Refer Date | Clients / Services (outer) folder |
| | | Service Referto Provider | Clients / Services (outer) folder |
| | | Service Need Id | Clients / Services (outer) folder |
| | | Right Now | Date objects / Right Now folder |
| | | Filter Objects: | Client Inactive |
| | Service Inactive | | Clients / Services (outer) folder |

9. REVISION HISTORY:

| Version | Description of Changes |
|---------|------------------------|
| V1 | Original version –BETA |