

ART Gallery Report 1303

Referral Report

CallPoint Report

EXECUTIVE SUMMARY:

This report is designed to enable I&R/211 operations to aggregate and report referral data recorded in ServicePoint/CallPoint. Referrals are categorized by AIRS taxonomy service/need codes, by US Need/Problem category, by Referred to provider, and by caller type. Referral statistics are displayed both in tables and graphically. Input controls and user prompts allow the user to focus the data on a specific provider, date range, need/problem category, referred to provider, caller type or any combination of these.

AUDIENCE:

Call center administrators

FREQUENCY:

Monthly or as needed

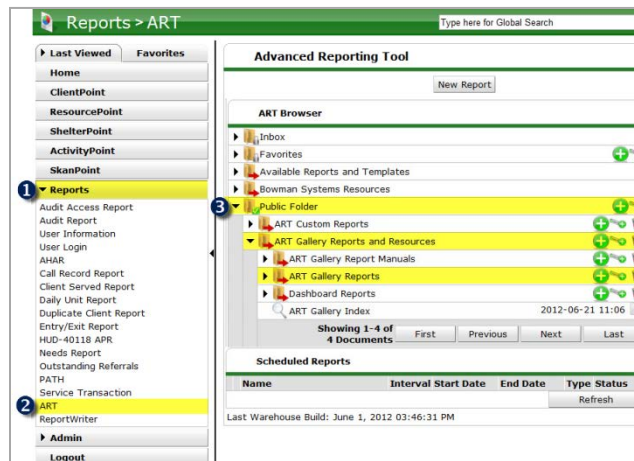
PURPOSE:

Data analysis and reporting

INSTRUCTIONS:

Instruction on how to retrieve, copy, run, and read this report is outlined below.

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 below:



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

Before running the report: Prior to running the report the user must determine the providers to be included in the report and a date range on which to base the results.

How to run:

Upon opening the report, the user will be prompted (see Diagram 1) 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 "Run Query" button to generate the report.

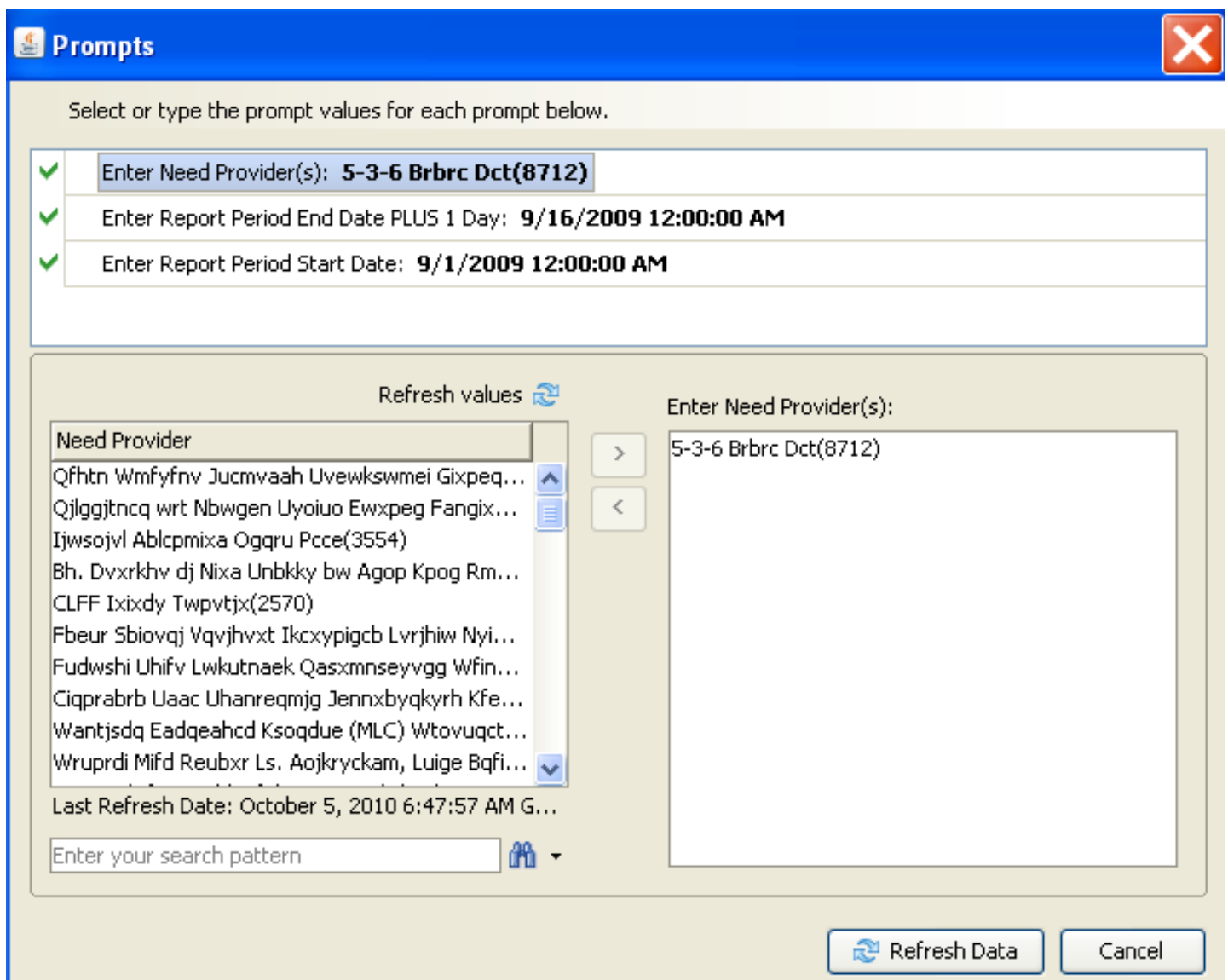


Diagram 1

The three user prompts contained in this report are:

1. **Enter Report Period Start Date:** The user should enter (or select from the calendar) the first day of the desired reporting period.
2. **Enter Report Period End Date PLUS 1 Day:** The user should enter (or select from the calendar) the first day immediately following the end of the desired reporting period.
3. **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.

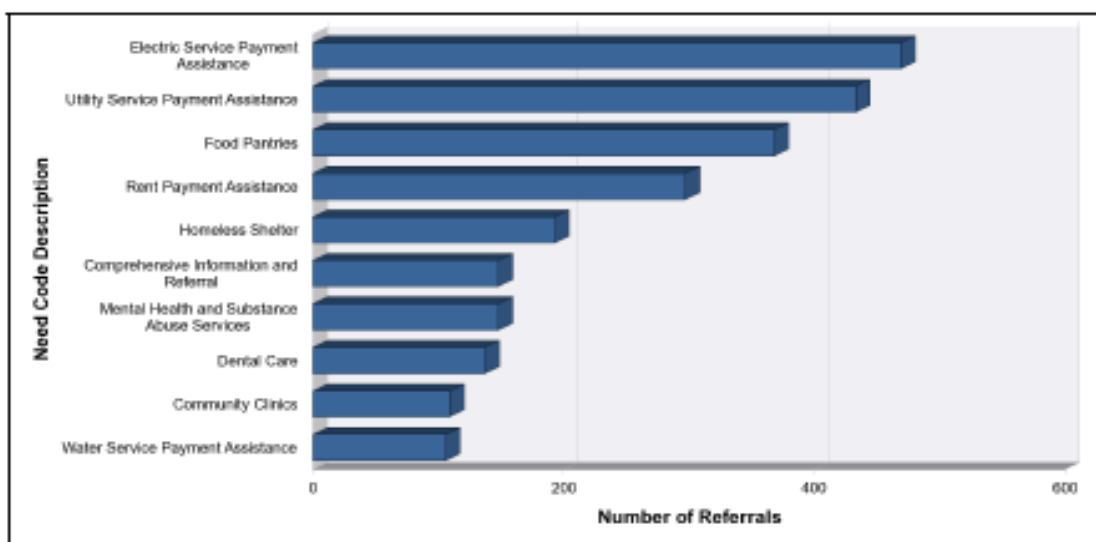
How to read: The report will generally contain two or more tabs. Each tab is a separate sub-report containing three sections:

- **Report Header:** The header contains the title of the report, and specifies any date parameters. When running the report in “modify” view, the report header is only visible in print/page layout mode.
- **Report Footer:** The report footer contains the title of the report, the name of the sub-report, the page number, the version number, and the date/time the report was run/printed. Like the header, the footer is only visible in print mode when the report is run in modify view.
- **Report Body:** The report body is the main section of the report located between the header and the footer where the reports data is displayed in a variety of different chart and graph formats. The data contained in each of the tabs in this report is displayed and described below:

CallPoint Referral Report

Referrals by Need

Date Range: 9/1/09 - 9/15/09

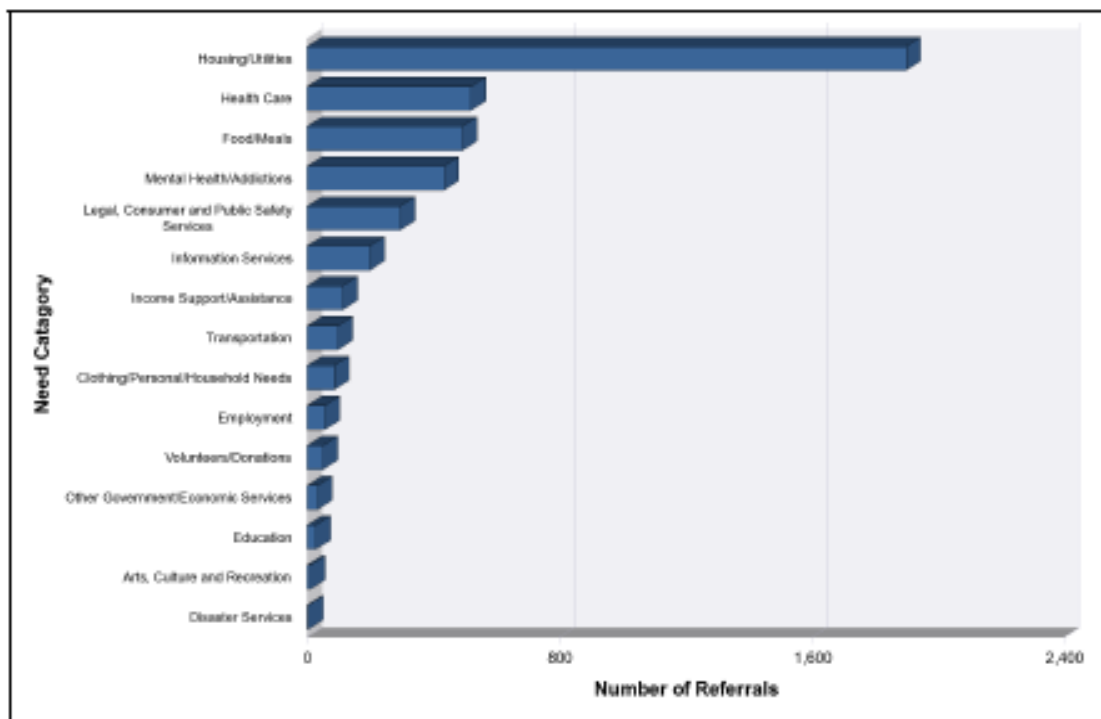


Need Code Description	Referral Count	Percentage
211 Administrative Entities	1	0.02%
211 Lead Agencies	1	0.02%
211 Systems	2	0.04%
Abortion Services	1	0.02%
Administrative Entities	7	0.15%
Adoption Services	11	0.24%
Adult/Child Mentoring Programs	2	0.04%
Adult Day Programs	5	0.11%
Adult Education	1	0.02%
Adult Probation	1	0.02%
Adult Protective Intervention/Investigation	5	0.11%
Adult Protective Services	1	0.02%
Adult Respite Care	5	0.11%
Advocacy	13	0.29%
Aging and Disability Resource Centers	38	0.84%
Air Transportation	1	0.02%
Alcohol Dependency Support Groups	14	0.31%
Alcohol Detoxification	5	0.11%
Amputee Rehabilitation	1	0.02%
Anger Management	16	0.35%
Animal Rescue	1	0.02%
Animal Shelters	7	0.15%
Anonymous HIV Testing	1	0.02%
Area Agencies on Aging	19	0.42%

Diagram 2

Tab A – Referrals by Need (Diagram 2): This tab contains a table that breaks down referrals counts by AIRS need type and calculates a percentage for each. This sub-report also includes a horizontal bar chart that graphically displays the top ten most frequently referred needs.

CallPoint Referral Report
Referrals by Need Category
 Date Range: 9/1/09 - 9/15/09

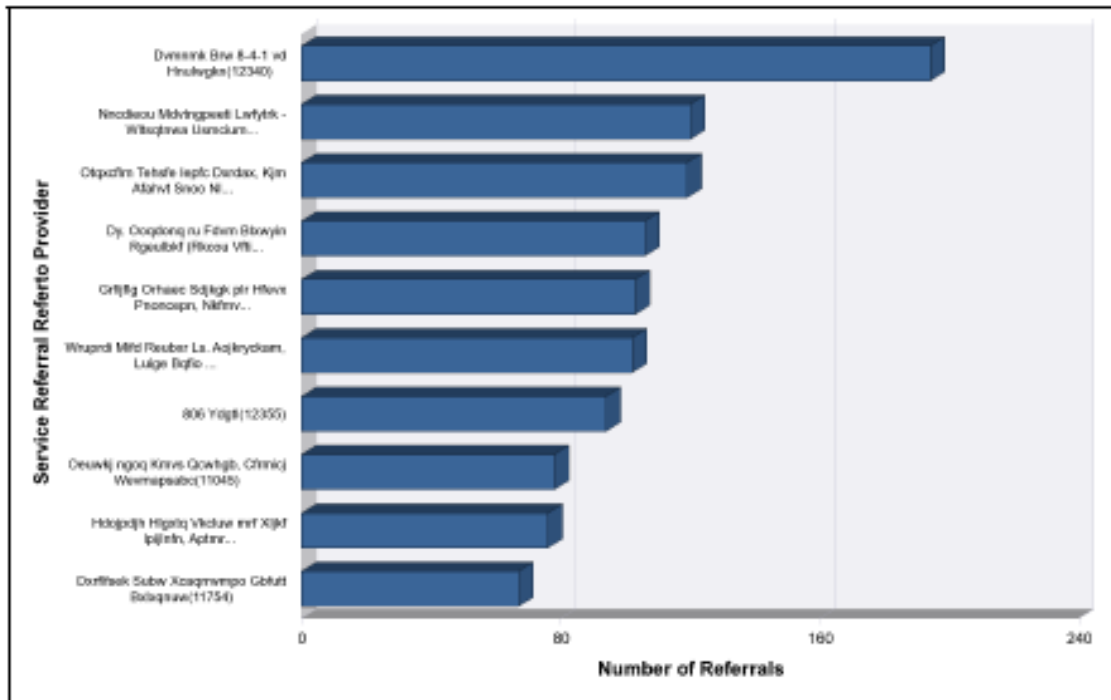


Need Category	Referral Count	Percentage
Arts, Culture and Recreation	11	0.24%
Clothing/Personal/Household Needs	85	1.88%
Disaster Services	5	0.11%
Education	28	0.62%
Employment	57	1.26%
Food/Meals	492	10.86%
Health Care	520	11.50%
Housing/Utilities	1,898	41.89%
Income Support/Assistance	113	2.50%
Information Services	199	4.40%
Legal, Consumer and Public Safety Services	295	6.53%
Mental Health/Addictions	434	9.50%
Other Government/Economic Services	33	0.73%
Transportation	98	2.17%
Volunteers/Donations	51	1.13%

Diagram 3

Tab B – Referrals by Need Category (Diagram 3): This tab contains a table that breaks down referrals counts by US need/problem category and calculates a percentage for each. This sub-report also includes a horizontal bar chart that graphically displays the all non-null categories in order of frequency.

CallPoint Referral Report
Referrals by Refer to Provider
 Date Range: 9/1/09 - 9/15/09



Service Referral Refer to Provider	Referral Count	Percentage
077 BraJusco(13287)	5	0.11%
202 Roxum Mohheel Qypsbcy(12661)	1	0.02%
255 Hhaf lcmim/Tyq(erlw leuof(9192)	1	0.02%
273 Godydoqn Lhwdxta(12353)	2	0.04%
312 Hxiphfisa Qdoforegn(8707)	1	0.02%
345 Spcsptl - Moggjfanba Hw(xb Delqnu(8710)	6	0.13%
5-3-6 Brtrc Dcl(8712)	5	0.11%
607 Bihyvnl & Ryyofe(12341)	1	0.02%
735 Epteru, Cbqofa & Kkv(12661)	1	0.02%
806 Yodt(12355)	94	2.08%
ACWFIAGH Awalvaf, UTE & Vwym l(13831)	2	0.04%
Acylcajq Vxaryw Txblhd Rodtkn - Poozt Rkfltu(13732)	3	0.07%
Ad. Aokkpcch Jtaowng(11866)	1	0.02%
ADCP Xqjwga Bopnarn Vjsoxhutmve Ybawmuku Vlumkbp(3541)	1	0.02%
Adjmu Mldx Bxoxifj Pjpxlue Jllp(12672)	1	0.02%
Afuzdvp Dy. - Dqemqj Jroasv - Iykpaehtwt(13453)	1	0.02%
Agmbxkwil Fbbpylbnp Twrlac (SFH) Fvalbrsoho Blndgsp(6848)	22	0.48%
Ahfqcll Xfup op Alcaq Cftyuqwpm Axccocekks Vgltohik(13570)	1	0.02%
Ahlguc Ioc as Jjvanf Tmerjc, Ioxgl Ocac Gme Kmff(13935)	27	0.60%

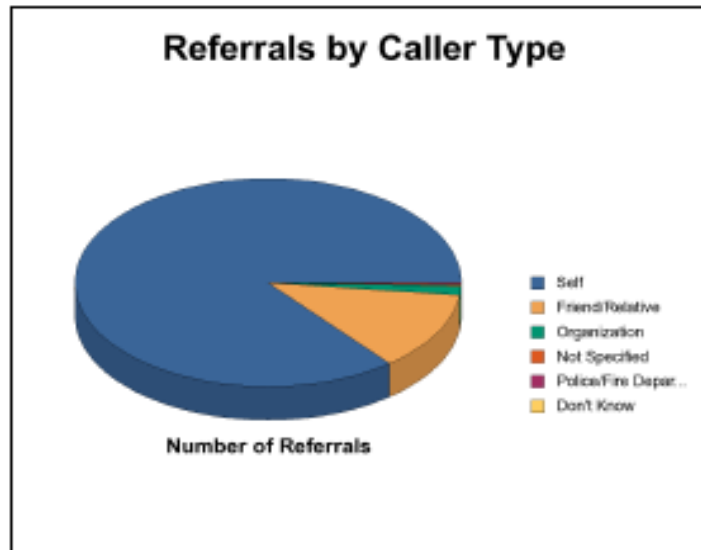
Diagram 4

Tab C – Referrals by Referred to Provider (Diagram 4): This tab contains a table that breaks down referrals counts by the program or organization to which the referral was made (referred to Provider) and calculates a percentage for each. This sub-report also includes a horizontal bar chart that graphically displays the top ten most frequently referred to Provider.

CallPoint Referral Report

Referrals by Caller Type

Date Range: 9/1/09 - 9/15/09



Call Record Caller Type	Referral Count	Percentage
Self	3,883	85.91%
Friend/Relative	551	12.18%
Organization	64	1.42%
Not Specified	11	0.24%
Police/Fire Department	9	0.20%
Don't Know	2	0.04%

Diagram 5

Tab D – Referrals by Caller Type (Diagram 5): This tab contains a table that breaks down referrals counts by the type of caller and calculates a percentage for each. This sub-report also includes a pie chart that graphically displays the data.

CallPoint Referral Report
Additional Information
 Date Range: 9/1/09 - 9/15/09

User Prompt Field	Value Selected
Enter Report Period Start Date:	9/1/2009
Enter Report Period End Date PLUS 1 Day:	9/16/2009
Enter Need Provider(s):	2-1-1 Main Call Center(1332); 5-3-6 Birbrc Dct(8712)

Providers Reporting Information in this Report	Referral Count
2-1-1 Main Call Center(1332)	
5-3-6 Birbrc Dct(8712)	4,520

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Diagram 5

Tab E – Additional Information (Diagram 5): This tab is provided as a reference to the user running the report and lists the parameters specified in the user prompts, as well as the total counts of needs, clients and calls by provider.

TECHNICAL NOTES:

1. Deleted/inactive calls, needs, and clients are not included in the report.
2. The horizontal bar chart in Tab B which displays the breakdown of referrals by need category excludes categories where the count is zero.
3. The breakdown of need categories contained in Tab B is based on the sixteen US need/problem categories. A crosswalk between these categories and the AIRS Taxonomy can be found in Gallery Report # 1305.

REPORT MODIFICATION

Users with ad-hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an ART Gallery report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the “save as” feature or by clicking on the “organize” icon in folder view.

NOTE: The original un-modified version of this report is a template and is retained in ART Gallery Templates folder structure. These template folders are read-only and any reports must be copied to a location in the user’s site (Favorites or Public Folders) then mapped to the site’s data.

MODIFICATION OPTIONS

Variations of this report can be created using the input control filters described below, however users may wish to make versions of this report for monitoring activity for a specific provider, need of a specific combination of parameters. Such variations can be easily and quickly accomplished by adding simple “equal to” or “in list” type filters to the appropriate field(s) in the “data” query.

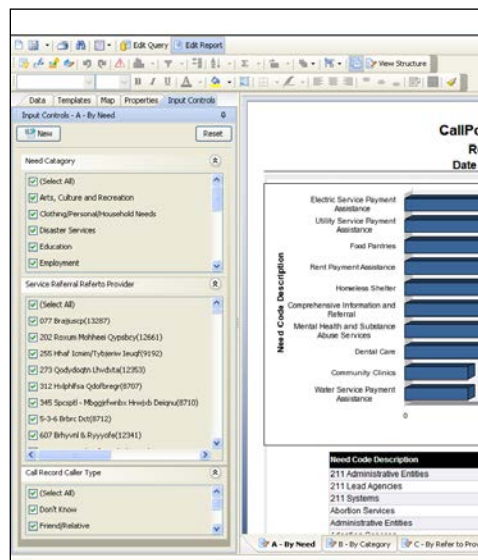


Diagram 6

INPUT CONTROLS

This report has been equipped with input control filters to allow both ad-hoc and viewer license users to easily filter the report results to a specific parameter or a combination of parameters. When the report finishes running the input control options will appear in the left hand window of the screen (See Diagram # 6). Input controls can be used individually or in combination to customize the report to the users reporting needs. Ad-hoc users can add additional input controls by first adding fields to the query results objects and then to the input control screen. This flexibility is a new feature of ART 3.0 and greatly enhances the report flexibility and usefulness.

Input controls are specific to the report tab on which they appear. Input control filters contained in this report are listed below:

Tab A – Referrals by Need

- Need Category
- Referred to Provider
- Type of Caller

Tab B – Referrals by Need Category

- Referred to Provider
- Type of Caller

Tab C – Referrals by Referred to Provider

- Need Code
- Need Category
- Type of Caller

Tab D – Referrals by Caller Type

- Need Code
- Need Category
- Referred to Provider

MAPPING OBJECTS

UNIVERSE: template_call_point_u
 template_service_code_u

This report is mapped to the CallPoint universe (template_call_point_u) and service code universe (template_service_code_u) and should be copied to your Public or Favorite folder then mapped to the equivalent event universes for your site (ex. *yoursite_call_point_u*).
 Mapping for the CallPoint universe can be done from the first query Data.
 Mapping for the service code universe can be done from the second query Codes.

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
BISData	Call Record ID	Location: Call Record Type: System Field Use: Result Object
	Call Record Start Date	Location: Call Record Type: System Field Use: Result Object
	Client Id	Location: Call Record / Client Type: System Field Use: Result Object
	Call Record Caller Type	Location: Call Record Type: System Field Use: Result Object
	Need ID	Location: Call Record / Need Type: System Field Use: Result Object
	Need Code	Location: Call Record / Need Type: System Field Use: Result Object
	Need Code Description	Location: Call Record / Need / Need Code Type: System Field Use: Result Object
	Service Need Service ID	Location: Call Record / Service Type: System Field Use: Result Object
	Service Code	Location: Call Record / Service Type: System Field Use: Result Object
	Service Code Description	Location: Call Record / Service / Service Code Type: System Field Use: Result Object
	Service Referral Referto Provider	Location: Call Record / Service / Service Referral Type: System Field Use: Result Object
	Service Referral Refer Date	Location: Call Record / Service / Service Referral Type: System Field Use: Result Object
	Need Provider	Location: Call Record / Need Type: System Field Use: Result Object

Codes	Service Codes Code	Location: Service Codes Type: System Field Use: Result Object
	Service Codes External Terms Name	Location: Service Codes / Service Code External Terms Code Type: System Field Use: Result Object
	Service Codes External Terms Code	Location: Service Codes / Service Code External Terms Code Type: System Field Use: Result Object
	Service Codes Description	Location: Service Codes Type: System Field Use: Result Object
	Service Codes Type	Location: Service Codes Type: System Field Use: Result Object
	Service Codes External Terms System	Location: Service Codes / Service Code External Terms Code Type: System Field Use: Query Filters

REVISION HISTORY

Version	Description of Changes
V11.05.31	Original version - BETA
V2	Revision: Updated Auto-Mapper information; added revision history; limited report to active calls, needs and services; updated query name.