

INFONET 2.0 MANUAL:

DOMESTIC VIOLENCE USERS



ILLINOIS COALITION
AGAINST DOMESTIC VIOLENCE

ICASA
Illinois Coalition
Against Sexual Assault

CACI
Children's Advocacy Centers of Illinois
leading educating collaborating

SEAL OF THE STATE OF ILLINOIS
AUG. 26TH 1818

ICJIA InfoNet 2.0

Username *

Password *




Login Clear

[Forgot your password?](#)

IDHS
Illinois Department of Human Services

ICJIA

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How to use this manual

In preparing this manual, we have strived to make it readable and useful. Firstly, as best as can be done for a software manual, we have tried to keep it simple and direct. Secondly, we have sectioned it and indexed it in such a way that most users can skip to one section read it, and then use the index to help as they have further questions. This leads to the following guidance on how to use the manual:

New InfoNet users

Quickly review Overview of InfoNet, have your agency's administrator teach you to connect and login, then review the Data Entry section. Use the index for quick reference as needed.

New InfoNet users at funding agencies

Once you have reviewed the Overview, and successfully connected to InfoNet, you will wish to focus on the Reporting section, especially the later Administrative Reporting section. If you are looking for specific reports or reporting capabilities or have questions about how data is entered by users, you will want to consult the index.

New InfoNet administrators and those setting up a new Center

You may wish to read the whole manual, however to get started we recommend reading the Overview, Connecting to InfoNet, and the Settings ⚙️ Section within Administering your Center in InfoNet.

Existing users and administrators

Feel free and read the whole document, however we strongly recommend you make use of the index. We have put effort into ensuring that the index covers all menu items in InfoNet both by name (e.g. Settings) and topic (e.g. Setting up a new Center).

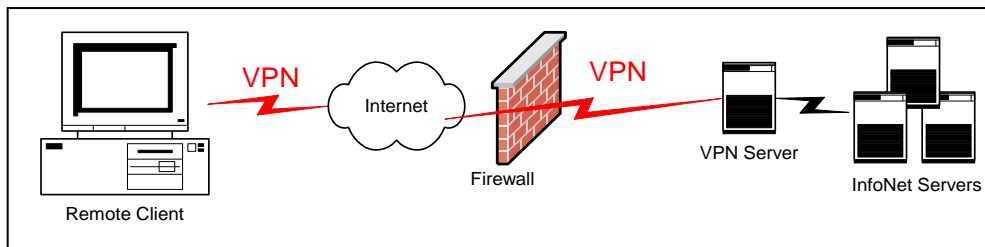
An Overview of InfoNet

What is InfoNet?

InfoNet is a web-based data collection system used by victim service providers in Illinois. The development and implementation of the system was a collaborative effort between the Illinois Criminal Justice Information Authority (ICJIA or the Authority), the Illinois Coalition Against Sexual Assault (ICASA) and the Illinois Coalition Against Domestic Violence (ICADV).

Where is InfoNet?

Remote users access a centralized database at the Authority, located in Chicago, using a web browser. Data is transmitted between users and the Authority database via a high-speed Internet connection, protected by an encrypted virtual private network (VPN).



Who uses InfoNet?

More than 100 sexual assault and domestic violence agencies access InfoNet from more than 180 sites throughout the state. InfoNet is available to ICASA and ICADV member agencies, domestic violence programs that are funded by the Illinois Department of Human Services, and the 30 centers comprising Children's Advocacy Centers of Illinois.

What data are collected in InfoNet?

InfoNet collects basic deidentified information about all clients—victims and significant others—who receive service from an agency. This includes demographic, health insurance, employment, education, marital status, income source, referral source, special need, and offender data. The type of victimization and the severity of abuse experienced by the victim are also captured, as well as the victim's interaction with the medical and criminal justice systems. Information about the client's identity such as their name or date of birth are not entered into InfoNet. Rather, a unique number is used to track each client.

Agencies also enter all services provided by staff and volunteers, including direct client services, hotline contacts, and outreach efforts such as training,

education, and system advocacy. Administrative information entered into InfoNet includes funding details, which are used to automatically generate reports that reflect grant-specific information.

How do agencies use the data?

Data stored in InfoNet is owned by the agencies and they may use it how they choose, subject to the requirements of their funding.

InfoNet includes a comprehensive set of reporting tools. These tools include standard reports that meet state and federal reporting requirements, as well as management reports and filters that assist case tracking and staff management. InfoNet reports are also utilized on a local, regional, and state level to identify emerging trends and to target limited resources for victim services.

How does InfoNet protect survivors' security

InfoNet takes multiple measures to ensure that the data collected in InfoNet—intended to help and advocate on behalf of victims—cannot be used to harm clients or those close to them. *The most important one is the confidentiality, and when possible, anonymity, of clients.*

While computer security technology such as the VPN, per device authorization, and the use of passwords protect the data within InfoNet, these are ultimately secondary to the strategic decision to *not* track data such as names, social security numbers, and exact addresses. This ensures two things:

1. In a worst-case scenario, an abuser with full access to InfoNet data would have difficulty locating their target within InfoNet's database and what data they could find would be of marginal use in physically finding their target.
2. InfoNet does not contain information that hackers target to steal identities for financial gain, reducing the likelihood professional hackers would target it.

To preserve the safety of clients, never enter data into fields other than intended (e.g. client address in the township field), and protect your passwords, your computers, and access to those computers.

What's New in InfoNet

InfoNet underwent a major rewrite and relaunch in 2018, this release was called InfoNet 2.0. Beyond features released with the relaunch, the rewrite has enabled new features to be scheduled for release starting in 2019 and continuing through 2021.

New Features in InfoNet 2.0

- Updated Interface and browser compatibility

- Complete rewrite of code enabling more frequent updates
- New VPN to decrease maintenance required by agencies
- Ad Hoc Reporting functionality, to allow more direct access by centers to data

New Features for July 1st, 2019

- Addition of Human Sex Trafficking, Human Labor Trafficking, Financial Abuse, and Spiritual Abuse as other presenting issues.
- Additional option of Middle Eastern/North African (MENA) as a Race/Ethnicity.
- New Direct Services: Safe Exchange and Supervised Visitation
- Ethnicity is no longer a separate option from Race/Ethnicity
- “Grooming” has been added as a possible police and prosecution charge
- New locations of Phone and Internet/Social Media have been added as possible locations for Primary Offense Location.

Planned Future Features

- Additional data entry screens for tracking income and benefits over time, and more in-depth client outcomes
- Additional interfaces for broader victim service agencies (for example gun violence)
- Prebuilt Reports for HUD APR and ESG-Caper reports, PMT reports, and the capability to build additional funder specific reports in the specific format required by the funding agency. Submitting reports will be primarily about having the data and not calculating and reformatting it.

Connecting to InfoNet

Logging into InfoNet

Logging into InfoNet is a two-step process: 1. Login via ICJIA's PulseSecure VPN, 2. Login to InfoNet. Your center's administrator will provide your VPN login and computer setup if you do not already have them. If you are the administrator see the section on registering devices and users.

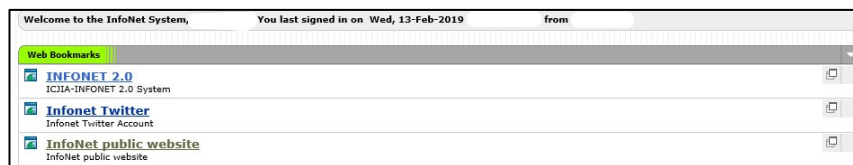
1. *PulseSecure VPN Login*—Open a web browser and navigate to <https://InfoNetvpn2.icjia.org/statewide>. You will briefly see a screen indicating “Loading Components...” If this does not change into a login screen, then your device may not be properly registered with the VPN. (See your administrator or the section on setting up devices.)



After components load, you should see a login screen. Enter your VPN username and password here. Note: All VPN usernames/passwords are unique, never share with anyone.



2. *InfoNet's VPN Landing page*—After successfully logging into the VPN, you will see another web page. Select the INFONET 2.0 link.



3. *InfoNet's Login Screen*—This is the login screen for InfoNet itself. Here you will use different username and password.



Note: Historically centers have used one or two username/password combinations per center. This practice is under active discussion and likely to change with future InfoNet versions. (Individual users all have unique VPN credentials.)

Computer recommendations to connect to InfoNet

Most computers built after 2008 can be configured to connect to InfoNet. The primary requirement is that the system have an internet connection and running an HTML5 capable browser. A computer with a 1 GHz processor and 2 GB memory running Windows 7 or higher, MacOS El Capitan or higher, or a version of Linux (such as Chromebooks) will be acceptable in most cases.

Note: For security purposes, never grant access to a computer or device except one that is owned/used by your center. I.e. no personal devices.

HTML5 Browsers

Apple Safari (version 10 and higher, available on MacOS)

Google Chrome (recent versions, please enable auto update)

Microsoft Internet Explorer 10 or 11

Microsoft Edge

Mozilla Firefox (recent versions, please enable auto update)

Opera (recent versions, please enable auto update)

Chromium (recent versions, please enable auto update)

Internet connection requirements

InfoNet requires a broadband internet connection such as a cable internet, DSL, or high speed cellular data connection. All InfoNet users must use the

PulseSecure VPN and pre-register their device's connection. This means that if a laptop is registered using its Ethernet port (advisable), it will not work when connected wirelessly.

Steps that must be taken prior to login

To prevent unauthorized access, each individual computer must be authorized before it can connect to InfoNet, and each computer must belong to your center. To grant a new individual access to your center's InfoNet, these are the steps in the process

1. The Director from your Center should write CJA.InfonetHelp@illinois.gov with the following information:
 - a. The name(s) of those needing access
 - b. The e-mail addresses of the new user(s), *if an organization has work e-mail addresses, this must be a work e-mail.*
 - c. If any new computers will be used to connect, the MAC address of those computers. (See the next section for guidance). Again, no personal devices.
2. Upon receipt of the request ICJIA will:
 - a. Register any new MAC addresses in the VPN
 - b. Contact new users securely and directly with their credentials
 - c. Reply to the director to confirm tasks complete.

In case of any concerns over a request, ICJIA may call the director to confirm the request and follow up with center's technical staff as needed.

Finding a computer's MAC address

A MAC (Media Access Control) address is an identifying number for a network device and therefore a specific computer. A MAC address looks like this:

78-C2-E4-3B-1A-E4

To ensure security, InfoNet's VPN (Virtual Private Network, PulseSecure) is configured to only allow pre-authorized devices to connect to InfoNet. To do this all MAC addresses must be preauthorized

Note: Each network device within a computer (such as Wi-Fi, Bluetooth, and Ethernet) has a different MAC address.

Windows

Press the Windows key or open the start menu and type “cmd” and press enter. This should open the command prompt. At the command prompt type “getmac /v”. You should see something like this:

```
X:\>getmac /v

Connection Name Network Adapter Physical Address Transport Name
-----
Ethernet        Broadcom NetXtr 74-27-EA-6B-0 - \Device\NPF{149FCC4F-B53B-4952-8ABC-2961ECBF2FB9}
```

The numbers under “Physical Address” are the MAC address. If the computer has more than one entry, you should select the connection that will be used to connect to the internet. If possible, using Ethernet to connect to the internet is strongly preferred for reliability and security.

Mac/Linux

Open a terminal, on a Mac this can be done by pressing cmd-space to launch search, then typing “terminal” and hitting enter. Once the terminal window opens, type “ifconfig -a”.

You will see something like this and you will need to look for HWaddr in the output. That is the MAC address. Again, be aware that you may see multiple MAC addresses, pick the Ethernet (or Wifi) device that you intend to use to connect to the internet.

```
ntu:~$ ifconfig
k encap:Ethernet HWaddr 08:00:22:92:62
t addr:10.0.2.12 bcast:10.0.2.252 mask:255.255.255.0
t6 addr: fe80::a00:27ff:fe92:62cf/64 Scope:Link
BROADCAST RUNNING MULTICAST MTU:1500 Metric:1
packets:17844 errors:0 dropped:0 overruns:0 frame:
```

Questions on user accounts and connectivity

Q: If I have a staff person that wants to do data entry from her home computer, can I request access to InfoNet from a personal computer?

A: No. InfoNet must not be accessed from personal computers, especially used off-site of the program. Temporary permission may be given with approval from a program director under special circumstances (and should be communicated to ICJIA along with directions detailing when this off site access should be revoked).

Q: Can staff use an agency owned laptop for offsite data entry?

A: This is permissible, though extreme caution is advised. Using a laptop offsite make the best sense only when direct service staff are entering data immediately into InfoNet as they work or using InfoNet as a case management system. Using a laptop offsite raises special security concerns related not only to potential theft of the device, but any paper records that may have been entered. Taking paper records of service along with a laptop for data entry offsite is discouraged.

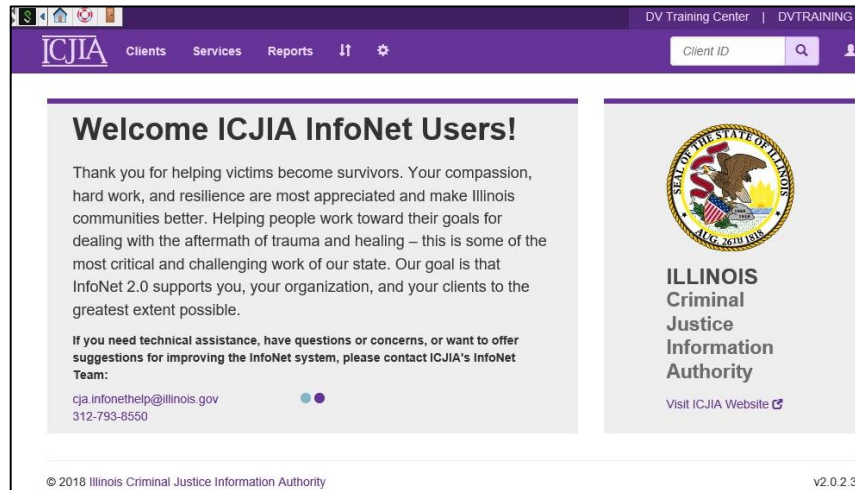
Q: I have staff that only needs to run reports and does not need access to revise or enter new data. Is limited accessibility allowed by InfoNet?

A: Yes. Contact ICJIA at 312-793-8550 or cja.infonethelp@illinois.gov to make those arrangements.

Data Entry—User Guide

System Navigation and Overview

After you first login to InfoNet your browser will look like this:



Clients—Client Intake, individual services, medical history, and criminal justice information

Services—Group Services and center services such as hotline calls, public advocacy

Reports—View Reports for performance management or funding

Data Exchange (⇕), *Settings* (⚙)—Administrative tools for importing/exporting data with other systems and managing InfoNet settings such as funding information and dropdown lists

Client ID (🔍)—Quick search /navigate to a specific client by their ID

User (👤)—Log Off

Client Intake

Adding a new Client

A new client (New Adult or New Child) may be added from the Client menu. Once you have selected to add a new client, you will be taken to a blank Adult (or Child) Intake screen.

Adult and Child Clients

For Domestic Violence centers, there are two client types: Adult and Child. While most functions are the same for Adult and Child Clients, e.g. finding

the client and recording a service, special attention will be given where functions differ.

An Adult will be the Client who was victimized by an offender, and a Child will be part of their household and likely a witness to abuse, or a victim of the same offender.

Child records omit certain demographics and sections that are generally assumed to be the same as their parent: offender(s), presenting issues, income, and referrals. Additionally, Child records also have a distinct data screen for tracking child behaviors at intake and exit, as is of special importance for child witnesses.

The client relationship, history of victimization, and goals are more relevant to determining who is entered as an Adult than whether a Client is 18 years old. For example, you may wish to enter 18- and 19-year-olds who enter their shelter with their mother as children. On the other hand, it may make sense to enter a 16-year-old emancipated minor as an Adult. Finally, in some cases it may make sense to enter both Mother and an older child as adults, for example if the 17-year-old has as additional offender or desires to become more independent from their mother.

Note that for some reports, e.g. HUD reporting, the client's estimated age, based on age at first contact, will be used to determine who is legally an adult, not the client type.

Regardless of whether someone under 18 is entered as an Adult, remember that their legal custodian must give consent for treatments within five 45 minute sessions. This does not apply for emancipated minors.

Demographics

Adult Intake
Demographics
Presenting Issues
Income
Benefits
Referrals
Special Needs
Services Needed
Residence
Previous Service Use

While InfoNet does not collect directly identifiable demographics such as name, date of birth, or social security, the core of the client record is still demographics. Several fields require special attention to the definition and usage standards within InfoNet and for reporting.

It is advised that your agency make a practice of asking *all* demographic questions of all clients, even if the client's gender identity, race, etc. seem obvious. This practice benefits marginalized and likely undercounted groups.

Demographics	
Client ID * <input type="text"/>	Sexual Orientation <input type="text" value="Pick One"/>
First Contact Date * <input type="text"/>	Veteran's Status <input type="text" value="Pick One"/>
Age at First Contact * <input type="text"/>	Employment <input type="text" value="Pick One"/>
Gender Identity * <input type="text" value="Pick One"/>	Education <input type="text" value="Pick One"/>
Race/Ethnicity * <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black/African American <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> MENA (Middle Eastern North African) <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Unknown	Marital Status <input type="text" value="Pick One"/>
	Pregnant <input type="text" value="Pick One"/>
	Number of Children <input type="text"/>

Demographics collected for Adults and Children

- *Client ID*—Client ID should be unique for each Client but not otherwise identifiable with the client. Typically, this would be the Client's case number at your organization used either on a paper file or separate database system. It should **not** contain any portion of the Client's name, SSN, Date of Birth, or other identifying information.
- *First Contact Date*—Set this date to reflect the first known date the client contacted your center. For example, if the client first met with an outreach worker from your center at a hospital prior to intake, enter that date of contact. Likewise, if the client first called the hotline enter the date of the call as best recalled.
- *Age at First Contact*—The client's age in years at first contact should be recorded. This is not necessarily the client's current age and should not be updated over time. Note: This will be used to determine approximate age for HUD and other funding agency reports by taking the age at first contact and the actual time since that date.
- *Race/Ethnicity*— Check all applicable boxes according to client's response, if unknown please only select unknown.

Recent Changes to Demographics

Race/Ethnicity was changed in InfoNet on July 1st, 2019.

First, the separate field called Ethnicity has been merged into Race/Ethnicity, with all existing records who had Ethnicity marked as Hispanic/Latino have been updated to ensure that the Hispanic/Latino checkbox is checked in Race/Ethnicity.

Second, Middle Eastern / North African (MENA) was added as an option in the Race/Ethnicity question. Where appropriate centers may wish to update the record individuals who may have been marked another Race/Ethnicity due to lack of this category. This category was broadly expected to be added to many federal forms (such as the US Census), however this change has not currently been adopted, until MENA is a category for HUD or VOCA reporting, individuals who only have MENA checked will be reported in the White category for those reports. MENA will however appear as a separate category in InfoNet reports.

Demographics only collected for Adults

Please select the single best option for the following. Remember that asking all clients all questions is vital for ensuring visibility of some groups.

- *Sexual Orientation*
- *Veteran's Status*
- *Employment*
- *Education*
- *Marital Status*
- *Pregnant*
- *Number of Children*

Demographics only collected for Children

- *Custody*—whether the Client, Offender, both, or someone else has legal custody.
- *Lives With*—who the child is most often spending overnights with currently.
- *School*—What grade of school is the child attending, please complete for all children. Too young for school, preschool, dropped out, and graduated are options.
- *DCFS Open*—whether there is an open DCFS case for the Child.
- *DCFS Investigation*—whether DCFS has or is currently investigating the Child's situation.

Editing Client ID



Adult
999
1 - 02/08/2019 Open
Client Summary

Within InfoNet in most cases editing information uses the same screens as adding a new record of the same type, except that the prior answers are already in place. This is true of most demographics as well, with one minor exception: Client ID. To edit a Client ID, open an existing client, and then find Client Summary in the upper right hand.

Client Summary will open a new screen. On the left hand side, you can edit Client ID along with other demographics such as Gender Identity and Race.

Demographics

Client ID *

999

Client Type *

Adult

Gender Identity *

Female

Ethnicity *

Unknown

Race/Ethnicity *

☐ American Indian or Alaska Native

☐ Asian

☐ Black/African American

☐ Hispanic/Latino

☐ Native Hawaiian or Other Pacific Islander

☒ White

☐ Unknown

Save

Nothing to Undo

While you will rarely want to change a Client ID, this is very useful if a typo was made when entering a client, or if your organization updates their policies about Client ID conventions.

Adult Specific Intake Forms

- Adult Intake
- Demographics

Presenting Issues

Income

Benefits

Referrals

Special Needs

Services Needed

Residence

Previous Service Use

Presenting Issues

Presenting Issues is used to record details about the specific incident(s) that lead the client to contact your center. They are only collected for Adults, as the Adult is assumed to have made the decision for the Children.

Presenting Issues

Primary Presenting Issue *

<Pick One>

Primary Offense Location

<Pick One>

Primary Offense Date

Other Presenting Issues (check as many as apply)

☐ Adult Survivor of Incest or Sexual Assault

☐ Aggravated Domestic Battery

☐ Assault and/or Battery

☐ Attempted Homicide

☐ Battery

☐ Burglary

☐ Child Abuse

☐ Child Neglect

☐ Child Sexual Assault

☐ Date Rape

☐ Domestic Battery

☐ Drugged

☐ DUI / DWI

☐ Elder Abuse

☐ Emotional Domestic Violence

☐ Harassment

☐ Hate Crime

☐ Home Invasion

☐ Homicide

☐ Human Labor Trafficking

☐ Human Sex Trafficking

☐ Physical Domestic Violence

☐ Rape or Sexual Assault

☐ Robbery

☐ Sexual Domestic Violence

☐ Stalking

☐ Violation of Order of Protection

☐ Other Assault

☐ Other Offense Against Person

☐ Other Offense

☐ Unknown Offense

Primary Presenting Issue—should reflect the incident or abuse that caused the Client to seek your help. It may or may not be the most recent or most severe incident.

Primary Offense Location—should reflect where that incident occurred

Primary Offense Date—should reflect the date or approximate date of the Primary Offense.

Other Presenting Issues—Enter all other presenting issues that caused the client to seek help at this time.

New Presenting Issue

With the July 1st, 2019 release of InfoNet included two new options for other presenting issues: Human Sex Trafficking and Human Labor Trafficking.

The Office for Victims of Crime (OVC) defines Human trafficking as follows:

***Human trafficking** is defined by the Trafficking Victims Protection Act (TVPA) as the use of force, fraud, or coercion for the purposes of labor or sexual exploitation (8 U.S.C. § 1101).*

***Sex trafficking** can present itself in a variety of forms including prostitution and pornography. Sexualized labor such as stripping and exotic dancing may turn into prostitution and become sex trafficking, but minus that, it is considered forced labor. Victims of sex trafficking can also be subjected to debt bondage. When commercial sexual acts involve a minor (individual under age 18), there is no requirement for force, fraud, or coercion to have taken place.*

***Labor trafficking** is defined as the use of force, fraud, or coercion for the purposes of debt bondage, involuntary servitude, peonage, or slavery. It can occur in many industries, including agriculture, construction, manufacturing, services, retail, domestic work, mining, and herding. Despite stringent child labor laws in the U.S., children are also vulnerable to labor trafficking.*

If either issue proves prevalent enough, future revisions may allow these as primary presenting issues.

Income

Income records the client's income. It is subdivided into different types of income in accordance with Housing and Urban Development standards. To enter data, first check the corresponding checkbox and then enter the amount per month.

Income

Select client's income source(s) and enter monthly amount (exact or approximate) for each source selected. If client has no income, check **No Financial Resources**. If income is unknown or client does not want to disclose this information, check **Unknown**. If an amount for a specific source is not known, enter -1 as the monthly amount.

☐ No Financial Resources ☐ Unknown

☐ Alimony or Other Spousal Support ☐ Supplemental Security Income or SSI
 \$ _____ Monthly \$ _____ Monthly

☐ Child Support ☐ TANF
 \$ _____ Monthly \$ _____ Monthly

☐ Earned Income ☐ Unemployment Insurance
 \$ _____ Monthly \$ _____ Monthly

If you have no data (e.g. client refused or was unable to tell), please be sure to check unknown. If the client indicates that they have no income, be sure to check No Financial Resources. Finally, if some data is available (e.g. TANF) but the amount is not, you may enter -1 for income sources where the amount is not known.

Note: Enter all applicable fields as they applied during Intake. InfoNet does not currently have the ability to track changes in Income over time, though this functionality is planned to release between fall 2019 and spring 2020. Until then please ensure Income reflects income at Intake for the current case.

Referrals

If your Adult client was referred to your center by another agency, indicate the type and, if available, the specific Agency that made the referral.

Referrals

Referred By

☐ Law Enforcement ☐ Clergy ☐ Child Advocacy Center
☐ Hospital ☐ Social Services Program ☐ Medical Advocacy Program
☐ Medical ☐ Housing Program ☐ Relative
☐ Public Health ☐ Sexual Assault Program ☐ Self
☐ DCFS ☐ Other DV Program ☐ Friend
☐ Legal System ☐ Education System ☐ Media
☐ Private Attorney ☐ Illinois DV Helpline ☐ Other
☐ State's Attorney ☐ National DV Hotline
☐ Circuit Clerk ☐ Other Local Hotline

Agency Name

Select an Agency

If the client receives any referrals to outside providers at intake, indicate those as well in the Referred To section.

Referred To		
<input type="checkbox"/> Law Enforcement	<input type="checkbox"/> Private Attorney	<input type="checkbox"/> Sexual Assault Program
<input type="checkbox"/> Hospital	<input type="checkbox"/> State's Attorney	<input type="checkbox"/> Other DV Program
<input type="checkbox"/> Medical	<input type="checkbox"/> Circuit Clerk	<input type="checkbox"/> Education System
<input type="checkbox"/> Public Health	<input type="checkbox"/> Clergy	<input type="checkbox"/> Other
<input type="checkbox"/> DCFS*	<input type="checkbox"/> Social Services Program	
<input type="checkbox"/> Legal System	<input type="checkbox"/> Housing Program	

Note: The Agency list may be updated by an administrator using Settings > Manage Lists > Agencies.

Forms for both Children and Adults

Adult Intake

Demographics
Presenting Issues
Income
Benefits
Referrals
Special Needs
Services Needed
Residence
Previous Service Use

Benefits

Please indicate which government benefits and health insurance the client is currently receiving. Please pay attention that answers, especially for health insurance may differ between Adult clients and their children, as well as between different children in the same household.

Benefits	
<p>Please indicate client's non-cash benefits</p> <p><input type="checkbox"/> Client receives no non-cash benefits</p> <p><input type="checkbox"/> Food stamps/food benefit card (Link Card)</p> <p><input type="checkbox"/> Special supplemental nutrition (WIC)</p> <p><input type="checkbox"/> TANF child care services</p> <p><input type="checkbox"/> TANF transportation</p> <p><input type="checkbox"/> Other TANF funded services</p> <p><input type="checkbox"/> Section 8, public housing, rent assistance</p> <p><input type="checkbox"/> Other non-cash benefit</p> <p><input type="checkbox"/> Unknown</p>	<p>Please indicate client's health insurance information</p> <p>NOTE: Check ONLY those health insurance options applicable to this client, NOT any minor children in the client's care.</p> <p><input type="checkbox"/> Medicaid health insurance (Client 18 or older only)</p> <p><input type="checkbox"/> Medicare health insurance</p> <p><input type="checkbox"/> State children's health insurance (Illinois Medicaid)</p> <p><input type="checkbox"/> Veteran's Administration Med Services</p> <p><input type="checkbox"/> Private Health Insurance</p> <p><input type="checkbox"/> No Health Insurance</p> <p><input type="checkbox"/> Unknown</p>

Special Needs

If the client needs accommodations, enter details here. This includes disability related needs as well as language needs.

Adult Intake

Demographics
Presenting Issues
Income
Benefits
Referrals
Special Needs
Services Needed
Residence
Previous Service Use

Special Needs	
<input type="checkbox"/> No Special Needs Indicated <input type="checkbox"/> Unknown <input type="checkbox"/> Not Reported	
<p>Special Needs of Client (check as many as apply)</p> <div> <div> <input type="checkbox"/> Has hearing impairment, requires assistance <input type="checkbox"/> Requires assistance in feeding, dressing, toileting, or other ADL <input type="checkbox"/> Must have medication administered <input type="checkbox"/> Has a visual impairment, requires assistance <input type="checkbox"/> Has limited English proficiency, requires interpreter </div> <div> <input type="checkbox"/> Requires wheelchair accessibility <input type="checkbox"/> Has immobility, requires assistance <input type="checkbox"/> Has developmental disability, requires assistance <input type="checkbox"/> Requires special diet <input type="checkbox"/> Other special needs </div> </div>	
<p>Primary Language</p> <div><Pick One></div>	<p>Other special needs</p> <div></div>

Be sure to indicate No Specials Needs indicated if indeed none are needed.

- Adult Intake
- Demographics
- Presenting Issues
- Income
- Benefits
- Referrals
- Special Needs
- Services Needed
- Residence
- Previous Service Use

Service Needs/Received

Indicate which services the client report needing at intake. To indicate, check the boxes in the left hand column. If Services were received that may be indicated at intake or at a later time.

Services Needed

These are general level needs. Check all needs the client has at or near the time of intake.

	Service Needs at Intake	Services Received		Service Needs at Intake	Services Received
Shelter	<input type="checkbox"/>	<input type="checkbox"/>	Child Care	<input type="checkbox"/>	<input type="checkbox"/>
Housing	<input type="checkbox"/>	<input type="checkbox"/>	Legal Services	<input type="checkbox"/>	<input type="checkbox"/>
Financial	<input type="checkbox"/>	<input type="checkbox"/>	Legal Advocacy	<input type="checkbox"/>	<input type="checkbox"/>
Referral	<input type="checkbox"/>	<input type="checkbox"/>	Medical Services	<input type="checkbox"/>	<input type="checkbox"/>
Lock Up/Board Up	<input type="checkbox"/>	<input type="checkbox"/>	Medical Advocacy	<input type="checkbox"/>	<input type="checkbox"/>
Emotional/Counseling	<input type="checkbox"/>	<input type="checkbox"/>	Crisis Intervention	<input type="checkbox"/>	<input type="checkbox"/>
Individual Support (Child)	<input type="checkbox"/>	<input type="checkbox"/>	Transportation	<input type="checkbox"/>	<input type="checkbox"/>
School Advocacy (Child)	<input type="checkbox"/>	<input type="checkbox"/>	Parent/Child Support (Child)	<input type="checkbox"/>	<input type="checkbox"/>
Group Activity (Child)	<input type="checkbox"/>	<input type="checkbox"/>	Community Advocacy (Child)	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>	Therapy	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>			

- Adult Intake
- Demographics
- Presenting Issues
- Income
- Benefits
- Referrals
- Special Needs
- Services Needed
- Residence
- Previous Service Use

Residence

Residences or locations are highly sensitive information as abusers could use this information to locate and harm clients. To prevent this, InfoNet does not track exact locations. However, as housing insecurity is a major issue, it is important to track changes in living situation, including both short and long-term accommodations.

To add a residence, click on the + sign in the residence section.

Residence

You may select any existing residences to view, edit, or delete information. If the client has moved, update by adding a new residence record with their new residence information.

Effective Date	State	County	Zip Code	City or Town	Township

Once you click the + you will see a new form appear within the Residence section.

Effective Date	State	County	Zip Code	City or Town	Township
IL					
<div>Effective Date *</div> <div><input type="text"/></div>					
<div>State</div> <div>IL</div>		<div>County</div> <div><Pick One></div>	<div>Zip Code</div> <div><input type="text"/></div> <div><input type="checkbox"/> Unknown <input type="checkbox"/> Not Reported</div>		
<div>City or Town</div> <div><input type="text"/></div>		<div>Township</div> <div><input type="text"/></div>			
<div>For shelter/housing clients only</div>					
<div>Residence Type</div> <div><Pick One></div>		<div>Length of Stay</div> <div><Pick One></div>			
<div></div>					

Each residence contains the following fields:

- *Effective Date*—The first date the client was staying at this location (approximate if necessary). There is no end date as it is assumed that the Effective Date for a new location is the same as the end date for the last.
- *State*—State, defaulted to Illinois, however may be changed to accommodate Children living with an out of state partner or offender, to record final moves out of state, etc.
- *County*—Enter the County if known.
- *Zip Code*—Zip Code
- *City or Town*—Name of the City
- *Township*—Enter the township if known. Do not enter other information about location as this may compromise the client's safety.

As well as the following two fields only for Shelter clients. (i.e. this is a HUD field.)

- *Residence*—Select the best choice described whether the residence is rented, owned, a shelter, etc.
- *Length of Stay*—Indicate approximately how long the resident has been staying at this location.

Adult Intake
Demographics
Presenting Issues
Income
Benefits
Referrals
Special Needs
Services Needed
Residence
Previous Service Use

Previous Service Use

If the client was previously at a different Domestic Violence shelter or at a homeless shelter, please indicate. This field is required for HUD reporting if the client is staying at your center's DV shelter and is used to correctly estimate the total number of women receiving services.

Previous Service Use

NOTE: For clients receiving shelter services only.

Have you used another DV shelter in the service area in the last year?

<Pick One>

Have you used another homeless service in the service area in the last year?

<Pick One>

If yes, about what date? (mm/dd/yyyy)

If yes, about what date? (mm/dd/yyyy)

Child Intake Form—Behaviors

For child clients indicate any behaviors that were observed (or reported by parents) at intake. Remember that when the Client leaves, the Out column of checkboxes should be updated.

Behaviors

Select which, if any, behaviors were observed in client (or disclosed by client's parent) at intake. Update later with behaviors observed of the client at intake. If client displays none of these behaviors, leave boxes unchecked. If client also displays no behaviors from all of the categories (Emotional, Physical, Social, or Educational), select None observed (intake or outcome).

None observed: ☐ In ☐ Out

	In	Out		In	Out
Emotional					
Is often afraid	<input type="checkbox"/>	<input type="checkbox"/>	Little interaction	<input type="checkbox"/>	<input type="checkbox"/>
Can't leave parent	<input type="checkbox"/>	<input type="checkbox"/>	Nightmares	<input type="checkbox"/>	<input type="checkbox"/>
Accepts w/o question	<input type="checkbox"/>	<input type="checkbox"/>	Hurts self	<input type="checkbox"/>	<input type="checkbox"/>
Cries often	<input type="checkbox"/>	<input type="checkbox"/>	Suicidal	<input type="checkbox"/>	<input type="checkbox"/>
Mood swings	<input type="checkbox"/>	<input type="checkbox"/>			
Physical					
Bed wets	<input type="checkbox"/>	<input type="checkbox"/>	Special class active	<input type="checkbox"/>	<input type="checkbox"/>
Illness often	<input type="checkbox"/>	<input type="checkbox"/>	Abuses drugs	<input type="checkbox"/>	<input type="checkbox"/>
Weight problem	<input type="checkbox"/>	<input type="checkbox"/>	Abuses alcohol	<input type="checkbox"/>	<input type="checkbox"/>
More active	<input type="checkbox"/>	<input type="checkbox"/>			
Social					
Plays with fire	<input type="checkbox"/>	<input type="checkbox"/>	Possessive	<input type="checkbox"/>	<input type="checkbox"/>
Role reversal	<input type="checkbox"/>	<input type="checkbox"/>	Hits, kicks, bites	<input type="checkbox"/>	<input type="checkbox"/>
Protective	<input type="checkbox"/>	<input type="checkbox"/>	Behaves young	<input type="checkbox"/>	<input type="checkbox"/>
Resists guidance	<input type="checkbox"/>	<input type="checkbox"/>	Harms animals	<input type="checkbox"/>	<input type="checkbox"/>
Educational					
Misses school	<input type="checkbox"/>	<input type="checkbox"/>	Special class behavioral problems	<input type="checkbox"/>	<input type="checkbox"/>
Drop out	<input type="checkbox"/>	<input type="checkbox"/>	Learning problems	<input type="checkbox"/>	<input type="checkbox"/>
Disobeys the rules	<input type="checkbox"/>	<input type="checkbox"/>	Special class learning problems	<input type="checkbox"/>	<input type="checkbox"/>
Behavior problems	<input type="checkbox"/>	<input type="checkbox"/>			

Creating Households

Often clients will enter services, especially shelter services, as a family. These clients should be linked together using the Households feature. To access the Households feature, select Clients from the top menu and then Households.

Households

Service Date Range: 12/13/2018 to 03/13/2019 Ranges: Last 3 Months

Household ID: Client ID:

Household ID	Clients	Creation Date
Karl Test Household	999, veloneus	02/19/2019

Note: Future functionality is planned for the households feature to enable checking entire households in as a group. Beyond this, having accurate household data will become required to use HUD reporting features. Using Households is strongly advised.

By default, this screen will show you all households where one or more members received services within the last 3 months.

To change this, select a different Service Date Range or use the preset Ranges option. Once selected, you may select edit to edit an existing Household or **+**Add New Household to add a new Household. Because edit and add are largely identical, we will cover adding a new household.

After selecting Add New Household a new screen will open with the following data fields.



- 1) *Household ID*—create a unique Household ID for the entire group, if you are using a Client ID system of naming a client something like 9876v where v is victim/the adult, and 9876ac is the child, then it is recommended to call the Household ID 9876. The household ID should contain no identifying information yet bear clear relation to the client ID or Client IDs that are kept.
- 2) *Household Members*
this division contains one or more rows for Client Id and Case ID
 - a) *Client ID*—enter the Client ID of a household member
 - b) *Case ID*—once a Client has been added, select the Case ID number.

Clients may also be added with the **Q**Add Clients by Search function at the bottom of the screen. To add additional Client and Case ID fields, select **+**Add New Client.

Victim Medical and Criminal Justice Information

InfoNet tracks Medical and Criminal Justice Information relevant to Client's abuse and victimization. These are only available for Adult Clients and will first appear as options after you hit save during or after Intake. It may also be accessed directly from Client Search results.

Medical

The medical section allows you to record details about medical treatment of injuries. Generally, this will be about the presenting incident, however it may also be used to record details of the most severe incident and/or the overall history of physical abuse and medical treatment.

Medical	
Visited Medical Facility? <input type="text" value="<Pick One>"/>	The Offender: (Check all that apply) <input type="checkbox"/> Threw something at your victim <input type="checkbox"/> Pushed, grabbed or shoved your victim <input type="checkbox"/> Slapped your victim <input type="checkbox"/> Kicked, bit or hit your victim with a fist <input type="checkbox"/> Hit or tried to hit your victim with something <input type="checkbox"/> Beat up your victim <input type="checkbox"/> Choked your victim <input type="checkbox"/> Threatened your victim with a knife or gun <input type="checkbox"/> Used a knife or fired a gun
Treated for Injuries? <input type="text" value="<Pick One>"/>	
Seriousness of Injury <input type="text" value="<Pick One>"/>	
Photos Taken? <input type="text" value="<Pick One>"/>	
Where are the photos? <input type="text"/>	
Type of Medical Facility <input type="text" value="<Pick One>"/>	
Evidence Kit Used? <input type="text" value="<Pick One>"/>	
Other Problem <input type="text"/>	

- 1) *Visited Medical Facility*—Indicate whether client sought treatment for abuse.
- 2) *Treated for injuries*—Indicate whether the client received treatment for injuries.
- 3) *Seriousness of injury*—Indicate the severity of injuries.
- 4) *Photos Taken*—Were photos taken of injuries for use in court?
- 5) *Where are the photos*—If photos were taken, who has them/where are they in custody?
- 6) *Type of Medical Facility*—What type of medical facility was visited.
- 7) *Evidence Kit Used*—Was an evidence kit used?
- 8) *Other Problem*—Enter non-identifying details or qualifications as appropriate to indicate other issues, e.g. hostile/helpful police involvement, or whether a third party kept notes
- 9) *The Offender*—check all applicable details about the incident that led to the medical facility visit.

Police/Prosecution

If the victim has reported abuse to the police, then enter relevant details of when the abuse was first reported and whether a trial is scheduled.

Police/Prosecution

Date Reported to Police

Indicate Interviews Conducted

☐ Patrol Interview
☐ Detective Interview
☐ State's Attorney Interview

Indicate Other

☐ Victim/Witness Program

Number of Court Appearances	Number of Defense Continuances	Number of Prosecution Continuances	Number of No Continuance - Case Progressed
0	0	0	0

Trial Information

☐ Trial Scheduled?

Trial Type

Victim/Witness Participate?

Date of Court Appearance *

Court Progress

A basic history of court appearances may also be entered here. Note that additional information (e.g. about trial outcomes and sentencing if applicable) is stored on the Offender record.

- 1) *Date Reported to Police*—the actual date reported to police
- 2) *Trial Information*—whether trial has been scheduled.
- 3) *Trial Type*—Jury/Bench/Unknown
- 4) *Indicate Interviews Conducted*—check all parties who interviewed the client (whether as victim or witness)
- 5) *Indicate Other*—Indicate if there is a Victim/Witness Program based in the police and/or prosecutor's office.
- 6) *Victim/Witness Participate?*—If there is a Victim/Witness Program, is the Victim participating? Mark Not Appropriate if there is no program available.
- 7) *Court Appearances*—The lower portion allows entry and recording of all court appearances by the client including the date, and the progress of the court case. The summary box provides quick tally of these
 - a) *Date of Court Appearance*
 - b) *Court Progress*

Order of Protection

1. Click on the Orders of Protection to continue entering Intake Information.
2. Click on the plus sign **+** to enter an order of protection.

Orders of Protection					
Originally Sought Order	County	Type	Forum	Date Filed	Number of Activities

3. Once the **+** is selected a new form will appear.

Originally Sought Order * <input type="text" value="<Pick One>"/>	Forum <input type="text" value="<Pick One>"/>
County * <input type="text" value="<Pick One>"/>	Issue Date <input type="text"/>
Type * <input type="text" value="<Pick One>"/>	Vacate Date <input type="text"/>
Date Filed * <input type="text"/>	Original Expiration Date <input type="text"/>
<small>For orders of protection issued for an indefinite period (no expiration date), enter 9/9/9999</small>	
Comments <input type="text"/>	
<small>300 characters remaining</small>	

This form contains the actual information about the Order of Protection

- a. *Originally Sought Order*—the status of this order as originally sought, e.g. Granted, Pending, Denied
- b. *Forum*—Whether the order was filed in civil or criminal court.
- c. *County*
- d. *Issue Date*—If the order was granted, enter the date of issue.
- e. *Type*—Emergency, Interim, Plenary, or unknown. If this is initially unknown, update to the correct option when known. If the order is converted, leave this as the original type and enter the conversion as activity (see next step).
- f. *Vacate Date*—If the order has been vacated, the date it was vacated.
- g. *Date Filed*—When the Order of Protection was filed/requested in court.
- h. *Original Expiration Date*—The original expiration date. If the Order is extended, then enter the change to expiration date

(and conversion of type if applicable) as an activity (see next step).

- i. *Comments*—Record any specific conditions or related comments on the protective order here (e.g. specific exceptions or prohibitions).

Warning: Remember to be extremely careful about not including any information that is unnecessarily identifiable, for example if there is specific prohibition of not coming within 400 ft of a workplace, write workplace and not a specific address (as may be on the actual order).

4. At the bottom of the Order of Protection Form is an area to record Protection Activities, such as an extension of the order, or conversion from one type to another.

PROTECTION ACTIVITIES		
Activity *	Activity Date *	New Expiration Date
+		

Record any such activity here by clicking **+** to add an activity, then select the specific Activity from the Drop Down, enter the date the change occurred in Activity Date, and (if applicable) the New Expiration Date.

Note: Do not change the original Type or Expiration date on the main Order of Protection.

Offender and Offender Criminal Case Information

You can enter limited data on the offender, including his/her sex, race, county of residence, relationship to client, and age. If the offender has a child with the victim, you can also indicate if the offender has visitation rights. If your client experienced victimization by multiple offenders, you can enter data on each offender. The database also allows you to track the offender's process through the criminal justice system. You can enter the offender's police and trial charges, as well as sentence records. If there are multiple offenders, you can enter this information for each respective offender. The following steps should be used to enter offender and offender criminal case information data:

Offenders

Track details about the offender(s) who have abused your client(s) using the Offender function.

To Add New Offender


1. Click on Offenders on the right-hand side of screen.
2. Select **+New Offender** on the Offender Screen.

3. Enter details about the offender. Note that Offender ID is automatically assigned by InfoNet after you save.

- Relationship to Victim*—Select the answer that best reflects the relationship of the Offender to the Victim. Remember that unknown is an option.
- Age at Victim Intake*—Enter the age, as best known, of the offender at the time of the client's intake.
- Gender Identity*—Select the most applicable option based on what the Client informs you.
- Race/Ethnicity*—Select the best single response field. (This differs from client race which is a select all that apply, this may change in future versions of InfoNet.)
- Visitation*—If the Client has no children, then enter Visitation not an Issue, otherwise enter the most appropriate answer.
- State/County of Residence*—Select the best available choice.

Police Charges

To enter details about any Police Charges, select **+** on the right within the Police Charges area of the screen.

Arrest Made? *	Charge Type
<Pick One> ▼	<Pick One> ▼
Date of Arrest	Date of Charge
<input type="text"/>	<input type="text"/>
Police Charge	
<Pick One> ▼	
	

1. *Arrest Made?* —Whether or not Police arrested the Offender
2. *Charge Type*—Felony, Misdemeanor, or Unknown
3. *Date of Arrest*—If an arrest was made, indicate the Date
4. *Date of Charge*—The Date charges were recorded by Police.
5. *Police Charge*—The specific charges made by the Police. Charges are sorted by category and color highlighted within the dropdown—Physical/violent crimes are coded red, Sex Crimes are coded blue, and non-violent crimes are coded yellow.

State's Attorney Charges

To enter details about any charges filed by the State's Attorney (i.e. the District Attorney, DA), select **+** to add a new State's Attorney charge.

Charges Filed? *	Disposition
<Pick One> ▼	<Pick One> ▼
State's Attorney Charge	Disposition Date
<Pick One> ▼	<input type="text"/>
Charge Date	
<input type="text"/>	

1. *Charges filed?* —Indicate whether the DA has filed charges.
2. *State's Attorney Charge*—Indicate what charge the DA is bringing against the Offender
3. *Charge Date*—The date charges were filed in court.
4. *Disposition*—This is the case disposition for this set of charges, indicating the outcome of the case. This includes Conviction, Acquittal, Hung Jury, etc.
5. *Disposition Date*—The Date the Disposition was reached. Generally, the date the judge or jury read their verdict in court.

Note: Related fields including whether a Trial has been scheduled, whether the Trial will be a Jury or Bench trial, and the extent of Client participation are included under the Medical/Criminal Justice – Police/Prosecution records for the client. Please keep these up to date as well.

Sentences

Within State's Attorney Charges, you can and should record Sentencing information related to the charge. Sentences can be added by clicking on the plus sign **+**. Once added, sentences appear as rows in a form. Please enter the date a sentence was given, and if applicable the years, months, and days. Note that there is not currently a place to enter the amount for fines and/or

SENTENCES					
Sentence Date *	Sentence	Years	Months	Days	
02/11/2019	Mandated Counseling		6	0	
02/11/2019	Probation	1	0		

restitution.

Attorney Charges and Sentences will only be saved once you select the save button, found on the right-hand side.

Intake and client demographics questions and answers

InfoNet and ICADV Data Collection Forms

Q Are the paper data collection forms developed by ICADV mandatory?

A No. Program administrators may revise these forms or recreate their own, as long as the required information is collected. ICADV-created intake forms include those for adults and children and for residential and non-residential programs; medical criminal justice process forms; service note documentation forms for adults and children; hotline call log form; turn away data collection form; group services form; and community and institutional data collection form. These forms may be requested by contacting CJA.InfonetHelp@illinois.gov.

Q Are staff signatures required on ICADV service contact forms?

A Yes, signatures are required.

Q Is it OK to leave the Comments section on ICADV forms blank?

A No. The Comments section must be completed with client-specific information. As these are paper files kept at your agency, they fall under a different set of security policies than InfoNet, which avoids open text fields related to client specifics.

Q On ICADV forms, there are check boxes on the Service Contact form under Service Interaction for *Contact circuit clerk*, *Safety/flight planning*, and *Explained court process*. Do these have anything to do with the reporting of activities to the InfoNet?

A The check boxes help save writing time for staff. These are not services entered into InfoNet, but common activities. There may be 3 or 4 boxes checked for topics covered that fit within one service category. For example, you might have spent an hour with a client and check 4 boxes. The hour of service fits civil legal advocacy, which is entered into InfoNet as a service. For each contact you 1) enter the hours of service in appropriate category, 2) indicate common topics covered (check boxes), and 3) write notes for interaction in the Comments section.

Client Information

Q What is a client intake?

A Client information collected to document the client's profile at the time of intake into the program. A sample form can be obtained from ICADV or by contacting CJA.InfonetHelp@illinois.gov. You may also create your own data collection form.

Q What fields on the client intake are mandatory?

A Only Client ID, Age, Race, Sex, First Contact Date, and Primary Presenting Issue are mandatory before you can enter a client in InfoNet. However, you should be collecting most intake data for most clients if possible, as that information is related to developing a comprehensive safety plan. Unknown and Unassigned data should be kept to a minimum.

Most of the data fields in the InfoNet data entry screens for intake are relevant to development of a comprehensive safety plan with a client. Most of this information may be obtained simply by saying "Tell me about your situation" to a client. Discussion style data collection may be better received by a victim than handing her a form to fill out. Advocates who use a discussion style will get more information and help victims the most.

This should also be balanced with importance of asking all questions to all clients, rather than making assumptions based on factors such as physical appearance. Be cognizant that asking all clients all questions not only avoids potential undercounting of some groups, but also avoids situations where individuals are only asked questions due to physical appearance.

Q What ID numbering system should I use for clients?

- A You may design your own numbering system to assign Client ID numbers, so long as the Client IDs contain no personally identifying information such as names, social security numbers, phone number, or dates of birth.

There are some general best practices as determined by existing InfoNet users:

- End client IDs with a distinct letter like V or A for adults and C for children.
- While the household feature should be used to link Adults and children (mandatory for HUD funded shelters), the following can assist in finding family members:
 1. For multiple children of the same adult victim, add another letter or number to the ID that corresponds to the child's age order (i.e. AC would be for the oldest child, BC would be for the next oldest child, CC for the next oldest, etc.
 2. Use the same core identifier for clients served from the same household or family. For example, a mom and her two children could be entered as: AB123v (mom); AB123c1 (older child); and AB123c2 (younger child). This gives you a visual indicator of clients from the same family or household in search results and service summaries.

- Q Can ID numbers contain client identifiers, such as client's initials, name, date of birth or part of her social security number?

A **ABSOLUTELY NOT!** No personal identifiers can be part of a client's assigned ID number. This practice is critical to protecting client confidentiality.

- Q When do I update or enter a new intake/case for a client into InfoNet? Does her first contact date change to the current date or remain the same as the first contact date on the first intake?

A *Updating an intake:* You should not update an intake except to complete or correct information pertinent to the client's situation when they first started receiving services.

Intake information entered into InfoNet should correspond to the victim's situation at the time of intake and should not be changed over time even as her situation may change. While a client receives services, things such as Employment Status, Marital Status, or Income may change such changes should NOT result in InfoNet data edits, as InfoNet must reflect a client's situation at the point of intake. However, important changes in the client's life should be documented in their physical case file.

If you do need to correct or complete information related to the client's status at intake: view the client's record, edit the blank, incorrect or unknown fields, then save the updated record. Only the following intake information should be updated as the client's situation changes over time: Referred To, Services Needed/Received, Residence, and Offender information.

Entering a new case: Enter a new case for any client returning after a lapse in service of *more than one year*. Clients should maintain their assigned ID number regardless of how much time has passed. To add a new case, view the client's record and click Add New Case. The screen will retain the client's ID number, Gender Identity, Ethnicity, and Race. All other fields should be entered to reflect the client's situation at the beginning of this new case. The First Contact Date should correspond to the client's most recent contact with the program.

Q When should we close a client's file?

A Agency policy should dictate when a client file should be closed. Generally, we recommend closing a file whenever the client has not been in contact for over one year.

Q How old does a victim have to be to be considered an adult client?

A Clients aged 18 and older are considered adults. However, if you have a teen who is the primary victim of domestic violence (e.g. teen dating violence), you may open him or her as an adult. If the teen is not emancipated, obtain consent for services from her parent or guardian before providing more than 5 service sessions of up to 45 minutes each.

Q Can we serve a child client if we don't have a related adult client?

A Yes. You should obtain consent for services from her parent or guardian before providing more than 5 service sessions of up to 45 minutes of service.

Q When a young client turns 18 while in shelter, is she reentered as an 18-year-old adult?

A If the child only remained in shelter for a couple of months after her 18th birthday, then she probably would not need an adult file. If she continues to receive services for several months after her birthday, it may be more appropriate to close her child file and open an adult file for her.

Q If a child was a client of the program and returns as an adult victim, do we assign her a new client ID number as if she were a new client?

A If your client was originally seen as a child witness and returns as an adult, primary victim of domestic violence, close their child file, and open him or her as an adult with a new client ID number. Reference this client's history with the program in their physical file.

Q If a grandmother with custody of her grandchild brings the child in for services, and the child's mother is also a client of the program, which adult record should the child be associated with—the mother's or the grandmother's?

A The child should be tied to the grandmother's record since she has custody and is bringing the child in for services. Similarly, if a foster parent brings a child witness for services, the child should be tied to the foster parent's record. If the custodial parent is not receiving services, the child's case should be opened independently of the adult. Additionally, you can open this child client as an *adult record* to ensure you can enter offender and other data only linked to adult clients. If this option is taken, make sure you assign this child a child's ID number (ending with a "c") even though you are entering this child client as an adult.

Q Which county should I document the client as being a resident of?

A The county in which she resided at the time of intake. If your client lives in Christian County and moves to shelter in Sangamon County shortly after intake, the client is still considered a Christian County client. However, if the clients move to Sangamon County (and if applicable move back) should be documented in residences.

Q What do I enter into the School field for a child too young to be in school?

A Enter Not of School Age.

Q What choice for education do I use for a client who received her GED?

A Enter High School Graduate.

Q How do I delete a client?

A You cannot delete a client and in general use there should not be a need to delete a client. However, as data belongs to the center, you may overwrite a client "to be deleted" with a new client, if desired. ICJIA discourages this unless the client "to be deleted" was a duplicate client record, an individual later determined not to be a victim, or a victim who insisted their data be scrubbed. Deleting or overwriting client records also removes them from historical records and reporting and could lead to further underestimation of DV needs.

If it is nonetheless appropriate to delete/overwrite a client, you can edit the Client ID number to indicate it as an obsolete record. Edit the Client ID # with some indicator flagging it as an obsolete record, e.g.

123v-BADID. Then, delete any services entered under this record. To see if services exist, go to the client's direct services section on their record (and do the same for housing services). Delete any services found. Clients without services will not appear on standard or management reports, so this obsolete record will not affect your data.

If you want to rid the obsolete record completely, you can overwrite this record with a new client's information. When the next new client comes in, instead of adding a new Adult (or Child) record, do the following: 1) View the "bad" client record; 2) Edit the Client ID # to reflect the new client's ID #; and 3) Proceed to overwrite EVERY field with the new client's information and save.

Q How to correct a data entry error in which an adult is entered as a child or vice versa?

A You cannot change a client's type or delete the client. Follow the steps for the question above for deleting the client and re-enter this client under the correct type.

Q What is the difference between the "In" and "Out" columns on the Child Behavioral Issues data entry screen?

A The "In" column refers to pre-intervention behavior problems identified at intake, during a formal assessment, or additional observations noted during the first 1-2 weeks of service.

The "Out" column refers to post-intervention behavior issues identified after assessment and following services, usually through observation and/or reports by parent and/or child. Because some clients may end services abruptly after a few sessions and do not have the opportunity to fully benefit from the services, grantees should develop a schedule for completing the "Out" behavior issues.

Q I have a child client who has not received direct services under her ID number, but she has been in child care at the program while her mother receives services. Do I close her case?

A No, keep the case open. However, depending on the age of the child, the agency should consider whether the child may benefit from more meaningful interaction with staff such as counseling while the parent is receiving services.

Q How do I enter age for a child under the age of 1 year?

A Enter 0 (zero) as the age.

Q How do I enter an unknown age of a client?

A Enter -1. However, if you have a good estimation of her age, enter the approximate value. It is better to have the client fall within an age range on the report than to have several Unknown ages for clients.

Q How do I complete the Pregnant field for a male client?

A Select Not Applicable.

Q How do we open a child client case when someone has obtained an OP on her/his behalf?

A *See Client Medical Criminal Justice Information Section.*

Q When documenting the number of children an adult client has, should I document the number of children in the parent's care or total number of children, including grown, independent children?

A Include only those children in the parent's care, even if only part time.

Services

Services are entered into InfoNet in multiple places, both under the Clients Menu and the Services Menu. Here is a brief summary of the services you can record in InfoNet, followed by specific sections related to entering each.

1. *Individual Client Services*—Entered under individual clients' record.
2. *Group Services*—You will enter data on the group services you provide. This information will include the hours of group service provided by staff, as well as the hours of service received by each client.
3. *Hotline Calls/Information and Referral*—In this part of the database, you will enter hotline calls and information and referral provided to both clients and non-clients.
4. *Community and Institutional Services*—You will enter data on the community and institutional-level services you provide. In these screens you will enter the number of presentations; the hours spent preparing the presentation, traveling to the presentation, and conducting the presentation; the number of participants, and the staff providing the services.
5. *Media/Publications*—You may record media appearances and/or publications that your staff worked on.
6. *Other Staff Activities*—This section was designed to allow agencies to document and report on activities their agency is completing but that don't fit the definitions of other services captured in the database.

Recording individual client services

During the time you are actively providing service(s) to a client, you need to enter hours of service provided on an ongoing basis (perhaps daily, weekly, or monthly). You will also enter the name of the staff person (volunteer) providing the service, the date the service was provided, and the specific service provided. As well as entering service data, you will also be monitoring cancellation of service and no-show data.

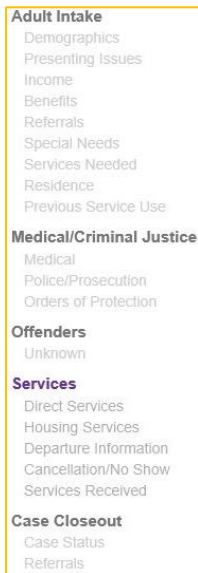
Entering the Services Menu

Because entering service data is likely to be one of the most frequent staff activities, it is useful to know multiple ways to reach the correct data entry screen quickly.

A search box with the placeholder text "Client ID" and a magnifying glass icon on the right.

If you know the client ID

You can open any client immediately by typing their client ID into quick search and pressing enter. This will take you to that client immediately. In fact if you were on the services menu for one client, typing in the ID of another client will take you directly to their services screen.

A vertical sidebar menu with the following sections: "Adult Intake" (Demographics, Presenting Issues, Income, Benefits, Referrals, Special Needs, Services Needed, Residence, Previous Service Use), "Medical/Criminal Justice" (Medical, Police/Prosecution, Orders of Protection), "Offenders" (Unknown), "Services" (Direct Services, Housing Services, Departure Information, Cancellation/No Show, Services Received), and "Case Closeout" (Case Status, Referrals).

When you have the correct client open

If you are already working with a client, either because you just used quick search to open them, or because you were updating their other data, you can select Services to enter service information.

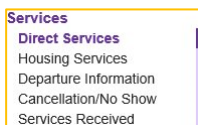
If the client is not open and you are unsure of their ID

After using one of the search features, you will see a list of clients. From this list, you can select the ▼ symbol next to Edit to see a menu, from this menu you can directly select Services to jump to that specific client's service screen.

Client ID	Case Number	Case Status	First Contact Date	Age	Gender	Client Type	
999	1	Open	02/08/2019	34	Female	Adult	Edit ▼
velonews	1	Open	02/04/2019	24	Transgender female (male to female)	Adult	Intake Medical/Criminal Justice Offenders Services Case Closeout

Direct Services

Once you have selected Direct Services you will see the Direct Services window, which has two parts. The upper portion allows for quick entry of new service records, including multiple at a time. The lower portion shows all prior service records and includes the options to filter, edit, or delete them.

A vertical menu with the following items: "Services", "Direct Services" (highlighted), "Housing Services", "Departure Information", "Cancellation/No Show", and "Services Received".

Adding Direct Service records

One or more service entries can be entered at the same time. Simply select the service, the staff or volunteer who provided it, the date of service, and the number of hours.

Direct Services

Add Service Detail

Service *	Staff/Volunteer *	Date *	Hours *	
In-Person Counseling	Bayne, Kathy	02/11/2019	1	
Civil Legal Advocacy/OP	Bayne, Kathy	02/11/2019	.5	
<Pick One>	<Pick One>			

Once all four have been entered, a new blank line will appear below to allow you to enter more service records. Once data entry is complete, check for any mistakes and then select save in the lower right hand corner.

Finding, editing, and deleting direct services

In the lower portion of the same Direct Services page, you will see a list of all Direct Service records. You may use date range (including preset such as previous year in the Date ranges dropdown) to filter this list.

Date Range

11/11/2018 to 02/11/2019

Date Ranges

Custom Range

Search **Reset**

Service Detail List

Action	Service *	Staff/Volunteer *	Date *	Hours *
<input type="checkbox"/> Edit <input type="checkbox"/> Delete	Art Therapy	Barker, Bob	02/09/2019	0.25
<input type="checkbox"/> Edit <input type="checkbox"/> Delete	Civil Legal Advocacy/OP	Bayne, Kathy	02/08/2019	1
<input type="checkbox"/> Edit <input type="checkbox"/> Delete	Life Skills	Fermin, Maria	02/08/2019	0.5

1 5

Displaying 1 to 3 of 3 Records

To edit a service, select the edit checkbox. This will permit you to change data fields for that row. You may edit multiple rows, however they must all appear on the screen at the same time. The delete checkbox works similarly. Edits and deletions will only take effect after you select save in the lower right-hand corner.

Housing Services

Like Direct Services, the upper portion of the Housing Service pane allows you to quickly enter one or more Housing Service records, and the lower portion allows you to filter, edit, or delete previously saved records.

Housing Services

Add Housing Service

Service *	Shelter/Tran. Housing Begin *	Shelter/Tran. Housing End	
<Pick One>			

Date Range: 11/11/2018 to 02/11/2019

Date Ranges: Custom Range

Search Reset

Where Housing Services differs is that each Housing Service record is expected to span multiple days. To create a Housing Service record, select a Service (Off-Site Shelter, On-Site Shelter, or Transitional Housing), and enter the first date that the client stayed in the housing. The end date is optional.

Housing End date should only be completed *after* the client has left the housing. InfoNet assumes that the client is staying in the Housing Service record without an end date. If all rows have an end date, an additional row will appear to allow further Housing Services.

Please be sure also to keep records up to date, a small number of inaccurate exit dates can quickly result in substantial overreporting. Be sure to follow appropriate local and, if HUD funded, HUD policies regarding individuals leaving a shelter for the weekend and returning.

Note that InfoNet checks that a client is only in one place per night, so if the client was checked into an off-site shelter, they must be checked out before they can be placed in transitional housing. This is done by editing an existing record to add a Housing End Date.

Filtering, editing, and deleting Housing Service records

The lower portion of the Housing Services pan has a filter to select Housing Services during a date range. If a housing service includes any day within the date range, it will be shown in the search.

Date Range: 11/11/2018 to 02/11/2019

Date Ranges: Custom Range

Search Reset

Housing Service List

Action	Service *	Shelter Begin *	Shelter End
<input type="checkbox"/> Edit <input type="checkbox"/> Delete	Off-Site Shelter	02/11/2019	
<input type="checkbox"/> Edit <input type="checkbox"/> Delete	On-Site Shelter	02/08/2019	02/10/2019

1 5

Displaying 1 to 2 of 2 Records

To edit an entry, first check the edit box, then change the values. For delete, simply check the delete box. Neither feature will save changes until you click the save button.

To check a client out of a shelter/housing, select edit on the row where they do not yet have an exit date, enter the exit date, then save. This is necessary prior to checking them into their next housing. Note: If they are leaving all housing/shelter services, you should also complete Departure Information.

Services
Direct Services
Housing Services
Departure Information
Cancellation/No Show
Services Received

Departure Information

Whenever a client exits Housing, you should also enter Departure Information for that client's exit. This is required for HUD funding. Fortunately, Departure Information can be entered quickly and easily at the same time as changing the Housing Services End Date.

- *Departure Date*—The date the client left your center's housing, this must either match an existing housing exit date, or you should edit the housing exit date at the same time (see section below).
- *Destination*—Select the most applicable description of the destination based on type of residence, e.g. treatment facility, temporary housing shelter, staying with family.
- *Destination Tenure*—If it is known approximately how long the client will stay at their next destination, indicate here, otherwise mark unknown.
- *Destination Subsidy*—Select what funding is supporting the client's new housing, or mark none or unknown as applicable.
- *Reason for Leaving*—Select the client's reason for leaving, or select unknown.

Best practice for entering departure information

As mentioned above, Departure Date must match a Housing Exit Date, and Departure Information is required for HUD funded shelters. These tasks can be completed easily at the same time:

The screenshot shows the 'Housing Service List' interface. At the top, there's a table with columns: Action, Service *, Shelter Begin *, and Shelter End. Two rows are visible: one for 'Off-Site Shelter' with dates 02/11/2019 and 02/13/2019, and another for 'On-Site Shelter' with dates 02/08/2019 and 02/10/2019. Below this is a 'Departure Information' section with a purple header. It contains fields for Departure Date *, Destination *, Destination Tenure, Destination Subsidy, and Reason For Leaving. A '+ Add' button is next to the Departure Date field. To the right of the form is a sidebar with a 'Client Summary' section and a list of services including Adult Intake, Demographics, Presenting Issues, Income, Benefits, Referrals, Special Needs, Services Needed, Residence, Previous Service Use, Medical/Criminal Justice, Medical, Police/Prosecution, Orders of Protection, Offenders, Unknown, and Services (Direct Services, Housing Services, Departure Information, Cancellation/No Show, Services Received). A 'Save' button with a green checkmark is at the bottom right.

1. Check the appropriate Edit box in Housing Service List, then enter the Shelter End Date.
2. Click the + symbol in Departure Information to add a new record, enter the Departure Date matching step 1.
3. Complete remaining fields in Departure Information and click Save.



Cancellations/No-Show

If a client was expected to meet with a Staff or Volunteer and either cancels the meeting or no-shows, then that should be recorded in Cancellations/No-Show. This information cannot be gathered elsewhere as InfoNet does not maintain schedules for groups, services, or other appointments as a security measure.

To enter a client Cancellation or No-Show, simply select the Service that was not attended, the Reason, the Staff who the Client was supposed to meet with and the Date. InfoNet will show a new blank row once these four fields have entries, this allows you to record multiple Cancellations/No-Shows at the same time.

The screenshot shows the 'Cancellation/No Show' form. It has a purple header with the title 'Cancellation/No Show'. Below the header, there's a section titled 'Cancellation/No Show' with four input fields: Service *, Reason *, Staff *, and Date *. Each field has a dropdown arrow. A red trash icon is located to the right of the Date field.

Previously recorded Cancellations/No-Shows may be reviewed, searched, edited, and deleted as well. This uses a similar interface to other features, where you may filter by date to find specific entries. Once you find an entry, you may check the edit box and change values, or you may check the delete box if the entire entry was in error. In either case, changes will only be made permanent when you click the green save button.

Date Range

11/13/2018
to
02/13/2019

Date Ranges

Custom Range

Search Q
Reset

Cancellation/No Show List

Action	Service *	Reason *	Staff *	Date *
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Economic Assistance	No Show	Barker, Bob	02/08/2019

1
5

Displaying 1 to 1 of 1 Record

Services
 Direct Services
 Housing Services
 Departure Information
 Cancellation/No Show
Services Received

Services Received

The Services Received section is the complement to Services Needed in the Client Intake. It shows what services the Client presented as needing at intake juxtaposed with what services they have received thus far. While the link with Intake is automatic, the Services are not connected to Direct or group Services.

Services Received

These are general level needs. As clients receive services to meet identified needs, check the corresponding Services Received box.

	Service Needs at Intake	Services Received		Service Needs at Intake	Services Received
Shelter	<input type="checkbox"/>	<input type="checkbox"/>	Child Care	<input type="checkbox"/>	<input type="checkbox"/>
Housing	<input type="checkbox"/>	<input type="checkbox"/>	Legal Services	<input type="checkbox"/>	<input type="checkbox"/>
Financial	<input type="checkbox"/>	<input type="checkbox"/>	Legal Advocacy	<input type="checkbox"/>	<input type="checkbox"/>
Referral	<input type="checkbox"/>	<input type="checkbox"/>	Medical Services	<input type="checkbox"/>	<input type="checkbox"/>
Lock Up/Board Up	<input type="checkbox"/>	<input type="checkbox"/>	Medical Advocacy	<input type="checkbox"/>	<input type="checkbox"/>
Emotional/Counseling	<input type="checkbox"/>	<input type="checkbox"/>	Crisis Intervention	<input type="checkbox"/>	<input type="checkbox"/>
Individual Support (Child)	<input type="checkbox"/>	<input type="checkbox"/>	Transportation	<input type="checkbox"/>	<input type="checkbox"/>
School Advocacy (Child)	<input type="checkbox"/>	<input type="checkbox"/>	Parent/Child Support (Child)	<input type="checkbox"/>	<input type="checkbox"/>
Group Activity (Child)	<input type="checkbox"/>	<input type="checkbox"/>	Community Advocacy (Child)	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>	Therapy	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>			

You should review the list periodically both as a reminder of whether they have initial needs that have not been addressed and to record which needs were addressed. To indicate that services were received, simply click the checkbox in the Services Received column next to the corresponding need.

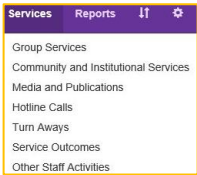
Group Services

Many services are offered to groups of clients (and sometimes community members) in one or more sessions.

Recording Single or Multiple Sessions

When recording Group Services, users currently have the option of either tracking each individual session a group meets or tracking multiple sessions at

once (e.g. an entire course). *Most InfoNet users record each session*—it provides clearer and more accurate data, and is easier to report on. However, many of the options you will see are aimed at entering multiple sessions at once and you may do so if you wish. ICJIA recommends Centers decide for their staff and set a policy whether to track individual sessions or courses.



Navigating to group services

To enter these services, navigate to the Services menu at the top of the screen, then select Group Services.

As on other screens, by default you will see the search results for the last three months. If you wish to edit past services you may modify the search by changing the dates.

Date	Service	Number of Sessions	Hours	Number of Participants	Staff/Volunteer
02/18/2019	Group Therapy	5	8	8	boop, betty
01/31/2019	Child Care	1	5	2	brown, tiger, Candy, Cane

Adding a new Group Service Session

Select **+New Group Service** to record a new session. This will open a new screen. This screen is divided into three portions—Group service and Service Details, Staff Details, and Attendees Details.

Entering Group Service and Service Details

Select the most appropriate Group Service from the Group Service drop down, this list is not modifiable or customized for your center.

The Service Details items should be completed as follows:

1. *Number of Sessions*—Enter 1 for a single session. If you are recording an entire course after it was completed, record the number of times the group (clients and staff/volunteers) met.
2. *Number of Attendees*—Enter the number of total attendees of the group, for a single session this will simply be how many clients or

community members came that day. In case of an entire course, enter the number of individuals who attended at least once.

Note: InfoNet will show a warning if you try to enter a number here that is not the same as the number of clients added to the session below. This is merely a warning to avoid incorrect data entry, as group sessions often have attendees who are not clients and/or wish to remain anonymous. In those cases you *should* record the total number of attendees, add the clients who attended, and then ignore the warning.

3. *Hours in Session*—For a single session, record the hours that the *group* met. For multiple sessions enter the *total* hours for all sessions that the group met, e.g. if a course had 8 sessions that met for two hours per session, the number would be 16.
4. *Date*—For a single session, simply enter the date the session occurred. For multiple sessions, pick either the first or last date that sessions met.

Enter Staff Details

Staff Details

Staff/Volunteer * Conduct Hours * Prepare Hours Travel Hours

<Pick One> [] [] [] []

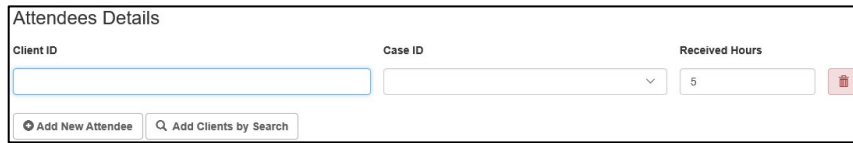
+ Add New Staff

All Group Services must have the following for Staff Details:

1. Select Staff/Volunteer who ran the session(s) from the drop down. The Staff must have been active when the session occurred to be saved and selected.
2. Enter the number of hours the staff person was actively running the session(s) with clients in Conduct Hours.
3. Additional Time Spent by Staff to prepare for group or travel to/from group may be entered in Prepare Hours and Travel Hours respectively.
4. If more than one Staff/Volunteer conducted the session(s), click +Add New Staff, and complete as above. Note: Conduct Hours may or may not be the same even if both staff attended for the whole time—Conducts Hours reflects active time conducting session.
5. To correct erroneous data entry you may select delete (🗑️) and remove the Staff/Volunteer's entry.

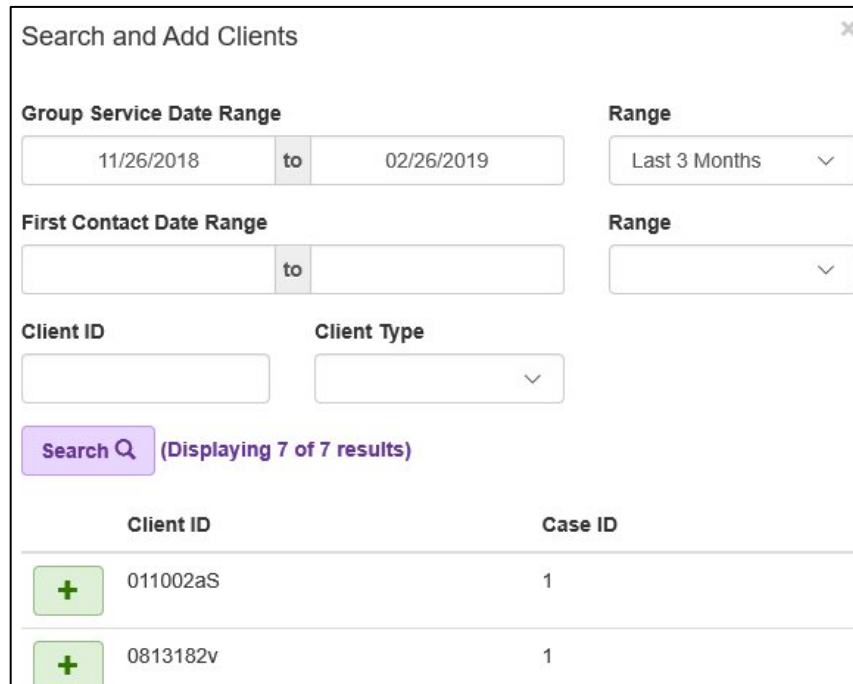
Enter Attendee Details

Attendee Details means who attended the session(s). There are two basic methods to add attendees to the list





The 'Attendees Details' form contains three input fields: 'Client ID' (a text box), 'Case ID' (a dropdown menu), and 'Received Hours' (a text box with the value '5'). To the right of the 'Received Hours' field is a red trash icon. Below these fields are two buttons: 'Add New Attendee' (with a plus icon) and 'Add Clients by Search' (with a magnifying glass icon).

1. Using **+** Add New Attendee, you can quickly enter clients using their whole or partial Client ID. As you type the ID in Client ID, InfoNet will automatically show a filtered search list as you type to assist you. (For example, if the client idea starts with v, it will show v100, vh12, etc.)
2. If you are unsure of the ClientID or want to select many from a list at the same time, you can use **Q** Add Clients by Search. When you select this option, a search window will appear.



The 'Search and Add Clients' window features several filter sections. The 'Group Service Date Range' section has date pickers for '11/26/2018' and '02/26/2019' separated by a 'to' label, and a 'Range' dropdown set to 'Last 3 Months'. The 'First Contact Date Range' section has empty date pickers and a 'Range' dropdown. Below these are 'Client ID' and 'Client Type' text and dropdown fields. A purple 'Search Q' button is followed by the text '(Displaying 7 of 7 results)'. At the bottom is a table with two columns: 'Client ID' and 'Case ID'.

	Client ID	Case ID
	011002aS	1
	0813182v	1

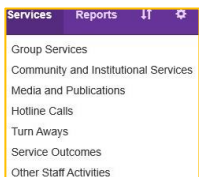
By default, this will show clients who already attended Group Service in the last three months, you may use the filter settings to narrow the list down. By clicking the **+** plus sign you can add one or multiple clients from the search results to the Group Service record.

After adding clients to the attendee list, verify the case information is correct and up to date for each client and enter how many hours that client participated/attended for:

Case ID	Received Hours
1 - 2/25/2019 - Open	5

Received Hours should reflect how many hours the Client was in attendance. For a single session this is the length of the session minus any time the client missed due to late arrival or early departure. For multiple sessions this can be complicated to track but is the total time the client spent in session for all sessions.

Once all details are correct, you may click Save in the lower right-hand corner below Attendee details. It may show a warning if details are unclear, for example if you enter that 5 attendees attended but only added 2 clients it will ask for confirmation.



Hotline Calls/Information and Referral

In this section of the database, you will enter hotline calls and information and referral provided to both clients and non-clients. The following steps should be used to enter direct client service data:

1. Select Services from the menu bar.
2. Select Hotline Calls. This will take you to a search screen, by default it will show calls from the last three months. To edit a call, find the call and click edit. The following instructions will also apply in edit mode.

Hotline Calls

Service Date Range
01/01/2018
to
12/31/2018

Ranges
Custom Range

Staff/Volunteer
<Pick One>


Call Type
<Pick One>

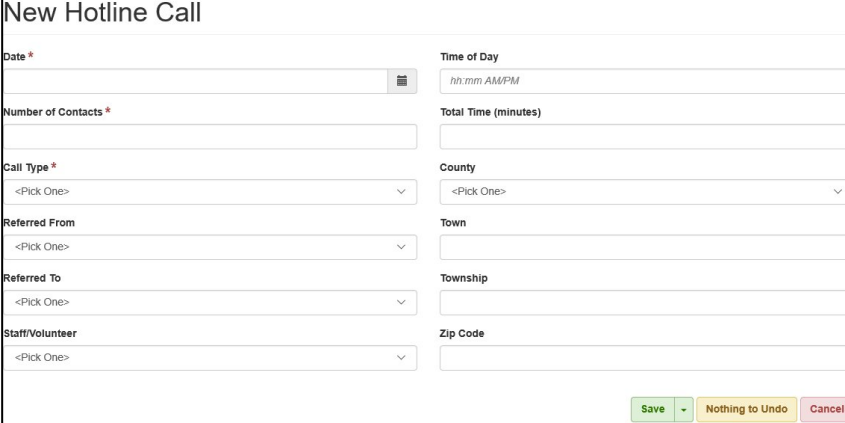
Search
Reset
New Hotline Call

Date	Staff/Volunteer	Call Type	
05/10/2018		Call Back - not a client	Edit
05/01/2018	Bell, Loretta	Hotline - not a client	Edit

1
10

Displaying 1 to 2 of 2 Records

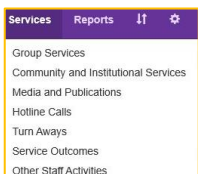
3. To add a new call, click  New Hotline Call. This will open a new screen.
4. Within the New Hotline call screen enter the following details:



- a. *Date*—The date of the call.
- b. *Time of Day*—When the call was received. If multiple calls were received, this should reflect the first call.
- c. *Number of Contacts*—The number of calls reflected in the record. For example if an initial call was received and a call back made, the number of contacts would be 2.
- d. *Total Time*—The total time spent on all calls (for this record/client/day).
- e. *Call Type*—This depends on whether you initiated the call and who you spoke to, select the best option as follows:
 - i. *Hotline—has ClientID*, use this option if a Client (DV Victim/Survivor who is already in InfoNet) called into the hotline.
 - ii. *Hotline—Information & Referral (not a DV victim)*, use this option if the person calling the hotline was not themselves experiencing domestic violence and calling for information or on behalf of someone else.
 - iii. *Hotline—not a client*, use this option if the caller is experiencing domestic violence and is anonymous/not a known client.
 - iv. *Callback—not a client*, use this option if you are returning a call or checking on a prior caller who is anonymous/not a client in InfoNet
 - v. *Callback—for clients*: this is not an option under hotline calls and should not be entered as a hotline call,

instead search for the client by ClientID, select Services/Direct Services, and record a Telephone Counseling session (unless more applicable option applies).

- f. *County*—if known, enter the County where the caller is located from. If from outside Illinois, select outside of state. If not known, enter unknown.
 - g. *Referred From*—if they were referred pick the best option of how the caller learned about the hotline.
 - h. *Referred To*—if you made a recommendation that the client receive support, pick the primary referral made from the choices.
 - i. *Town, Township, Zip Code*—enter any and all details about the caller's location if known.
 - j. *Staff/Volunteer*—enter the staff/volunteer who handled the hotline call.
5. Click Save to Save or Cancel to quit. If you are entering multiple Hotline calls (for example if you are entering hotline calls as you take them), then you may select the ▼ option on the Save button to access the Save & Add New. This will save and immediately start recording a new hotline call.



Community and Institutional Services

You will enter data on the community and institutional-level services you provide. In these forms, you will enter the number of presentations; the hours spent preparing, traveling to, and conducting the presentation; the number of participants; and the staff providing the services. You will also enter data on staff time spent providing group services (adult, children, family, and IDVA group counseling) for direct service clients here. The following steps should be used to enter community, institutional, and group services data:

1. Select Services.
2. Select Community and Institutional Services.

Date	Service	Number of Sessions	Hours	Number of Participants	Staff/Volunteer
------	---------	--------------------	-------	------------------------	-----------------

3. This will take you to a search/results screen summarizing the Community and Institutional Services from the past three months. To review or edit these records you may change the filters (Service Date

Range) at the top of the window. Editing will function largely the same as adding.

4. Select **New Community/Institutional Service** to add a new service record.
5. The upper portion of the data entry screen covers details about the service and the agency/organization who received or hosted it.

The screenshot shows a web form titled "New Community/Institutional Service". At the top is a dropdown menu labeled "Community/Institutional Service *" with the placeholder text "<Pick One>". Below this is a section titled "Service Details". It contains several input fields: "Date *" with a calendar icon, "Agency" with a dropdown menu (placeholder "<Pick One>"), "Number of Presentations/Contacts *" (text input), "Location" (text input), "Total Hours *" (text input), "State" with a dropdown menu (placeholder "IL"), "Number of Participants *" (text input), and "County" with a dropdown menu (placeholder "<Pick One>"). At the bottom is a "Comments" section with a text area and a character count "200 characters remaining".

- a. *Community/Institutional Service*—select the most applicable service to summarize the activity from the drop down.
- b. *Date*—the date of the activity/service.
- c. *Agency*—select the most relevant agency who received (or hosted) the service. This list is populated by the Agencies list and can be edited to add/remove or order the options.
- d. *Number of Presentations/Contacts*—enter number of sessions, presentations, or times staff were in contact with the audience here.
- e. *Location*—enter the location of the service/agency. Note: This is an open text field, please only use for intended purpose.
- f. *Total Hours*—the total number of hours of service/presentations, based on hours on the clock. Example if 4 staff gave presentations from 1pm to 3pm, then the total hours would be 2.
- g. *State*—defaulted to Illinois, if service was delivered outside of Illinois select the applicable state.
- h. *Number of Participants*—number of individuals in audience/who received service.
- i. *County*—the county where service occurred.

- j. *Comments*—enter any relevant details about the session that might need to be referenced later. If clients (either of your center or the other agency) attended/presented, avoid any mention that could possibly be use to identify them.
6. The lower portion of the data entry screen is for recording the efforts of staff/volunteers. At least one staff name is required.

Staff Information

Staff/Volunteer *

Conduct Hours *

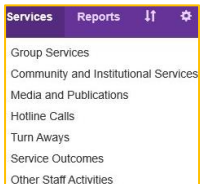
Prepare Hours

Travel Hours

<Pick One>

Add New Staff

- a. *Staff/Volunteer*—select name from the dropdown.
- b. *Conduct Hours*—Enter the hours of active presentation/conduct here.
- c. *Prepare Hours*—Enter staff time spent preparing for service delivery here.
- d. *Travel Time*—Enter time spent travelling to and from the agency/service location here.
- e. If more than one staff/volunteer was involved, add additional rows using ➕Add New Staff. To correct erroroneous data entry/remove a staff from the activity, you may select the trash can🗑 next to their row.



Media and Publications

The Media and Publications feature is used to record and track Media appearances and/or publications such as articles, interviews, or reports by your organization and/or staff.

Once you select Media and Publications, you will be taken to a new screen that by default shows your organizations recent media. If desired you may edit those records (which will be almost identical as creating a new record), or create a new record.

Media and Publications

Service Date Range

01/01/1970

to

03/04/2019

Ranges


Custom Range

Search

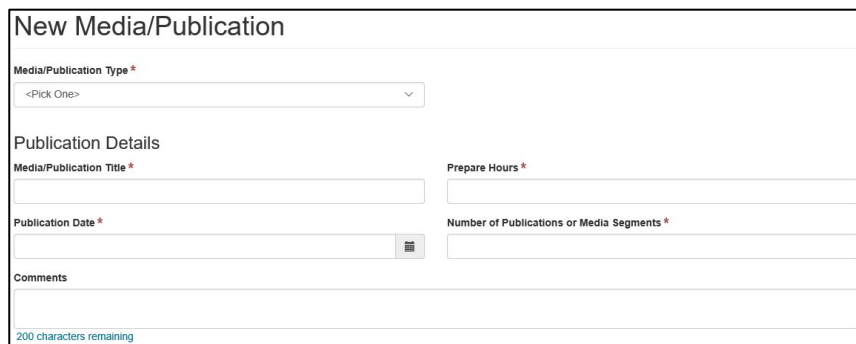
Reset

New Media/Publication

Date	Type	Title	Number of Publications	
05/28/2014	Media: TV	dv overview	1	Edit
05/15/2014	Media: Radio	DVAM Announcement	1	Edit

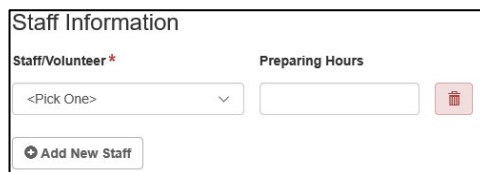
To create a new a record, select  New Media/Publication, which will cause the data entry/edit screen to appear.

1. *Media/Publication Type*—select the most appropriate from the drop down.
2. *Media/Publication Title*—enter the name of the publication or an applicable description such as “interview on channel 5 news.”
3. *Prepare Hours*—the number of hours spent preparing the publication or media. Note that you may enter the staff efforts seperately in a lower section.






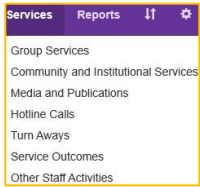
4. *Publication Date*—the date of release or publication of the media/interview/etc.
5. *Number of Publications or Media Segments*—if this was a pamphlet series, or multiple appearances, you may enter how many segments are referenced here. It is your choice whether to enter the series as one entry or many.
6. *Comments*—enter any comments or details that are relevant to have on file, e.g. how to access the files/video, who had requested. Be sure not to inadvertently store any identifiable information about client activities here.

Below these fields there is a section to add staff names and time to the record.



1. *Staff/Volunteer*—select the individual from the dropdown menu.
2. *Preparing Hours*—enter the total number of hours this individual spent to prepare or assist with the media or publication.

3.  **Add New Staff/**  **Delete**—select add to add additional staff/volunteers to this record. If a staff person was entered in error, you can remove their row with the trash icon .



Other Staff Activities

This section assists programs in tracking total hours spent on various activities, that are not collected in other places throughout the database. Although it is not mandatory for most programs, some may be asked to collect information on their VOCA or VAWA grant that is not collected elsewhere in the database. Whether or not that applies to your organization, tracking other staff activities can be helpful in presenting the time and therefore money required to do your work, which may be of great help when soliciting funding.

To enter other Staff Activities, select Services and then Other Staff Activities. Once selected this will open as a search results screen showing recent entries for Other Staff Activities. If desired you can edit one of the existing records by clicking edit, which is largely identical to adding a new entry.

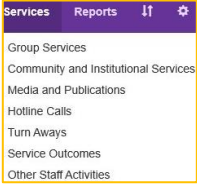
The screenshot shows the 'Other Staff Activities' search results interface. It includes a header with the title 'Other Staff Activities'. Below the header, there are filters for 'Activity Date Range' (12/04/2018 to 03/04/2019) and 'Ranges' (Last 3 Months). There are also dropdown menus for 'Staff/Volunteer' and 'Other Staff Activity', both currently set to '<Pick One>'. Below these are 'Search' and 'Reset' buttons. A 'New Other Staff Activity' button is located on the right. A table of results is shown with columns for Date, Staff/Volunteer, and Activity. One entry is visible: Date 02/08/2019, Staff/Volunteer Bell, Loretta, and Activity DV Program Staff Meeting. An 'Edit' button is next to this entry.

To add a new record, select  **New Other Stuff Activity**. This will open a new data entry screen.

The screenshot shows the 'New Other Staff Activity' data entry form. It has a title 'New Other Staff Activity'. The form contains several fields: 'Other Staff Activity' (dropdown menu, currently '<Pick One>'), 'Conduct Hours' (text input), 'Staff/Volunteer' (dropdown menu, currently '<Pick One>'), 'Travel Hours' (text input), 'Date' (text input with a calendar icon), and 'Prepare Hours' (text input). All fields are marked with an asterisk, indicating they are required.

1. *Other Staff Activity*—Select the best matching activity from the dropdown menu. Note that this is populated by a center managed list that can be modified in settings by a center administrator.
2. *Conduct Hours*—The number of active hours spent presenting/performing the activity.
3. *Staff/Volunteer*—Select the staff or volunteer who performed the activity.
4. *Travel Hours*—Enter any travel time the staff/volunteer had to use.

5. *Date*—The date of the activity.
6. *Prepare Hours*—If applicable how many additional hours were used to prepare for the activity.



Turn-Aways

If an individual or family requests temporary housing but you cannot currently provide shelter due to space constraints, you can *and should* still enter this data as Turn-Aways. This information is extremely useful to show whether or not you might need to expand services, and via the data from all centers, whether more funding/resources are required throughout Illinois.

Reflecting the importance of capturing this data, once you select Turn-Aways from the Services menu on the menu bar, you will be first taken to a date entry screen.

1. *Date*—The date the client/s were turned away.
2. *Number of Adults*—Number of adults in client group.
3. *Number of Children*—Number of children in client group.
4. *Referral Made to Another Shelter*—Whether a referral to another shelter was made.

Note that you may enter multiple groups of Turn-Aways at once by clicking Add New Turn Away. Because Turn-Aways are only collected in aggregate, there is no expectation that data will be de-duplicated, so if the same family returns multiple times and is turned away, they may be entered multiple times.

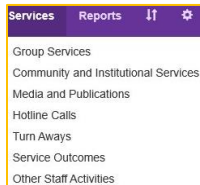
You may also edit or delete inaccurate entries by reviewing the search results below the data entry panel on the same screen.

Action	Date	Number of Adults	Number of Children	Referral Made to Another Shelter?
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	02/25/2019	1	2	No

Service Outcomes

InfoNet allows tracking of Service Outcome surveys via the Service Outcomes function. In line with preserving confidentiality, and often anonymity of clients, the present Service Outcomes survey system has minimal data entry. Each survey contains a short series of Yes/No questions, and InfoNet tracks the counts per each survey collection, i.e. group of surveys, not individuals.

Once you select Services Outcomes from the Services menu, you will be taken to a data entry page (with prior responses shown below).



Service Outcomes

Add Service Outcomes

Note: Service outcome data should be entered at least once per quarter.

Date	Client Service Group	Survey Question	No. of YES Responses	No. of NO Responses
<input type="text"/>	<Pick One>	<Pick One>	<input type="text"/>	<input type="text"/>

[+ Add New Service Outcome](#)

Service Outcomes is based on surveys of specific Client Service Groups, so you will want to first enter the date that a survey was taken in the Date field, and then select the applicable Client Service Group from that dropdown.

Add Service Outcomes

Note: Service outcome data should be entered at least once per quarter.

Date	Client Service Group	Survey Question	No. of YES Responses	No. of NO Responses
02/25/2019	Legal Advocacy	Safety planning	<input type="text"/>	<input type="text"/>
		Community resources	<input type="text"/>	<input type="text"/>
		Legal rights as DV victim	<input type="text"/>	<input type="text"/>
		Report OP violations	<input type="text"/>	<input type="text"/>

At least one Yes/No is required for this service group.

[+ Add New Service Outcome](#)

Once a Client Service Group has been selected then the appropriate series of Yes/No tally boxes will be shown on the right. Enter the *group* totals for each question. If you multiple different survey collections (either the same survey on multiple dates or different surveys on the same/different dates are to be entered at the same time, then you may select **+Add New Service Outcome** to enter more data at the same time. Once you are done, click save.

If you wish to edit/update past surveys, you may do so at the bottom of the screen.

Service Outcome Date Range		Ranges			
12/05/2018	to 03/05/2019	Last 3 Months			
<input type="button" value="Search Q"/> <input type="button" value="Reset"/>					
Action	Date	Client Service Group	Survey Question	No. of YES Responses	No. of NO Responses
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	01/09/2019	Support Groups	Abuse effects on children	2	4
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	01/09/2019	Support Groups	Abuse effects on life	3	3
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	01/09/2019	Support Groups	Community resources	3	3
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	01/09/2019	Support Groups	Hopeful future	2	4
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	01/09/2019	Support Groups	Safety planning	5	1

Here you will see past survey results filtered by date, and edit rows/responses. If for example you find a loose survey from a past collection, you may wish to enter it here by selecting edit and then modifying the answers. Once you are done select the save button (from the upper portion, it works for all changes on the screen at once).

Services questions and answers

Direct Client Services

Q What unit of measurement should I use to document direct client services—minutes or hours?

A Use .25 hour increments. 15 minutes = .25 hours; 30 minutes = .5 hours; etc. The time entered should reflect as closely as possible the total amount of time spent with the client providing service *and* time completing documentation for that interaction.

Q May I enter the services provided by contractual consultants/providers?

A Yes. You must enter the contractual person in the Administration→Staff Information section of the database using the term Contractual as their First Name (or part of their first name, e.g. John - Contractual). Their Last Name could be the type of service or their actual name. For example, your program's contractual child therapist may be entered as: First Name = Contractual; Last Name = Child Therapist.

Note: This may change in a future update.

Q What service should I use to document time I spend doing a child's intake with the mother? What if I am completing multiple children's intakes with the parent?

A You should document this as Individual Child Counseling under the child's ID number. If intakes for multiple children are being

completed, enter an Individual Child Counseling service record for each child.

Q If a client leaves shelter for a couple of nights and later returns, do we give her a shelter end date when she leaves and open a new shelter record when she returns?

A Sometimes. If you have a client in shelter and the client leaves for 1-3 nights with plans to return, AND you are holding space for this client, do not close the shelter service record. If your client leaves shelter for more than 3 nights in a row, OR their space was NOT held during absent nights, close the shelter record and enter a new shelter record if the client returns. Always document when the client leaves shelter in your paper log sheet and client files. *If your agency receives HUD funding, follow policies of HUD and/or your local continuum of care's (COC) policy instead of the above.*

Q How long does a client need to be in residence before documenting shelter for her?

A Providing shelter (on or off site) is providing housing in emergency situations. If you provide a place to stay, document this as receiving shelter. Use your best judgment. If a client comes into shelter for only 2 hours (from 7-9 p.m.) and decides to leave, that would not be considered a shelter night. However, if a client comes into shelter at 3 a.m. and leaves at 8 a.m., you have provided a place to stay overnight and that shelter night should be entered.

Q What is the difference between on- and off-site shelters?

A On-Site Shelter is provided on-site at the residential domestic violence program. Off-site shelter is emergency shelter provided to clients by the domestic violence programs, but at an off-site location such as a safe home or motel.

Q We had a client at an off-site shelter location, but once space became available in our residential facility, she transitioned into our shelter. How do we enter her shelter services?

A Enter Begin and End Dates for the Off-Site Shelter stay. Then enter additional Begin and End Dates to reflect an on-site shelter stay in your residential facility.

Q How do I document Family Counseling in both parent and child's files?

A Record the session as a Group Services and include parents and children as attendees. See *Group Services Section*.

Q Do I document counseling appointment cancellations or when the client does not show up for an OP hearing?

- A While not required, you may track No Shows and Cancellations for any service by entering data on this page: Services→Direct Client Services→No Show/Cancellation. Do not document service hours for the time you waited for the client. Instead, enter a No Show record and make a note in the client's physical file.
- Q When documenting Collaborative Case Management, how do I split the time spent evenly among each employee involved?
- A The time should be entered only for the staff person who was the primary source of information in that session and completing the documentation for that interaction.
- Q When staff runs an errand, such as picking up a client's medication, what service should be used to document it?
- A Transportation.
- Q If we spend time distributing medication to adult clients for their children, should the time spent be documented under the adult or child record?
- A Document that contact under the child's record since the parent may be administering medication to more than one child.
- Q If legal services are provided by a paralegal, should that be documented as Legal Advocacy/Advocate or Legal Services/Attorney?
- A Legal Services/Attorney because the services are provided under the direction and supervision of the attorney.
- Q Is time spent entering client data and service data into InfoNet considered a direct client service?
- A No. Entering data into InfoNet is an operational activity and should not be included in hours of services provided to clients. However, time counselors/advocates spend completing service case notes may be counted in direct client service hours provided to clients. See *Direct Client Service Definitions* for listing of appropriate services.
- Q Should staff time spent advocating for a taxi cab voucher for a client be considered a Transportation service or an Economic Assistance service?
- A Transportation.
- Q What is the difference between Counseling and Therapy services?
- A Counseling services are the general emotional support, education, and other information and resource services that domestic violence programs regularly provide. Therapy activities are more intensive, therapeutic services provided by a *licensed* therapist working for the domestic violence program. If *licensed* staff are providing therapy,

therapy categories (e.g. Group Therapy, Individual Therapy) should be used.

Q How do I count time spent during intake briefly explaining the IDVA and a client's rights for an order of protection?

A IDVA advocacy (Civil or Criminal Legal Advocacy/OP) likely will be recorded for every intake. This time should be counted as Civil Legal Advocacy/OP (or Criminal Legal Advocacy/Obtain OP if appropriate).

Q Are we required to provide .25 hours of Civil Legal Advocacy/OP services to every new client to explain her rights under IDVA?

A Although this is considered good practice and should be completed with as many new clients as possible, there may be situations that don't lend themselves to discussing IDVA issues, especially with clients in extreme crisis. Between 90% and 95% of new clients should receive Civil Legal Advocacy/OP services. If the number new clients not receiving this service becomes excessive, it may warrant further examination.

Q What service should I use to document time spent consulting with an adult regarding her child's case?

A Other Advocacy is entered under the child client's record.

Q What service should I use to document time spent improving a parent's ability to effectively discipline her child while they are in shelter?

A Parental Services

Q If adult clients attend a Children's Group Counseling session with their children on a limited basis to help understand what their child is experiencing, how should I document that activity for the adult? For the children?

A Document the parent's attendance in Parental Services. Document the group session under the children's records as Group Children's Counseling.

Q If a program has a consultant that provides education on topics like self-care and hygiene, what service should be entered?

A Life Skills.

Group Services

Q How do I enter a one-hour group session co-facilitated by two staff—one hour or ½ hour for each co-facilitator?

A Go to Services→Group Services and enter the group session indicating the Conduct Hours and Preparation Hours for each staff person. If

both staff co-facilitated during the whole session, both staff should receive one full Conduct Hour. Remember, Total Session Hours should match the length of the session (one hour).

Q How do I document Family Counseling in parent and child's files?

A Use Group Services and add both parent and child to the attendees.

Q I can't find the ID number of a client that has attended a group session. How do I enter the service for that client?

A Most likely, the ID number is not showing up in the Available Clients list because the default search criteria used to create that list exclude the client you are looking for. The default list shows **ONLY** those Client IDs who received any type of *group* service within the last 90 days. A client who never received a group service before will not appear in this list.

- If there are dates entered in the Group Service Date fields, try removing the dates from the Group Service Date fields entirely and use another search field, such as First Contact Date, Client ID, or Client Type.
- If you still cannot find your client, try searching with all the search fields blank. This will produce a list of all clients ever served by your agency. The list will be long, but Client IDs are listed in alphanumeric order so you should be able to find the client fairly easily.

Q How do I enter a Child Care session when I am caring for children from more than one family?

A Start by entering the Group Service information. Enter the number of children cared for as the number of participants. Then, on the attendees tab, enter the ID numbers of **ONLY THE ADULTS** that received Child Care as a service. Remember: Child Care is a service provided to an adult client, not a child. The number of participants on the Group Service tab will provide the number of children cared for in that group setting.

Note that when saving this record, a warning message will likely appear stating that the number of Attendees (adult Client ID numbers added to group) does not match the number of Participants (number of children cared for). This is okay; just disregard the message as this is a unique type of group service. The message is just a warning to ensure you do not mistakenly leave out attendees and will not prevent you from saving the record as entered.

Q How many hours would be documented if I provide Group IDVA to 3 clients at the same time for an hour?

A You would enter the group service as Group IDVA, 1 session for 1 hour, and then all three (3) Client ID numbers on the Attendees tab. This will show up on the Standard Services Report in multiple places depending on which sub-report you are viewing: 1) On the Client Services Report (1st table), 3 hours of direct client service will be displayed because 3 clients each received 1 hour of service and 2) 1 hour of service will be displayed on the Community, Institutional, & Group Services Report, because the session was 1 hour (Presentation Hours).

Q When I do a search for ID numbers to enter a group session, why do some ID numbers appear multiple times with numbers after them?

A These are clients with multiple cases. The number after the ID indicates the case number for that client. Add the most recent case or the ID with the *highest* case number to the group.

Q If I provide a group that covers multiple planned topics during the same session, how should I break out the data to reflect those interactions—combined in one group session or entered in multiple sessions showing each type of service individually?

A Complete 1 group log sheet for the session indicating the amount of time spent on each topic. For example, if the session was 2 hours long and 1 hour of it was Adult Group Counseling, ½ hour was spent on Life Skills, and ½ hour was spent on Conflict Resolution, enter 3 separate group sessions: 1-hour session Adult Group Counseling; ½ hour session on Life Skills; and ½ hour session on Conflict Resolution.

Community and Institutional Services

Q May I enter an entire month's worth of community and institutional services in one record if the service was the same?

A Yes, you may enter aggregate monthly data. However, remember that if you aggregate your data entry, you will not be able to extract weekly or daily data—only monthly aggregate totals. If you decide to aggregate monthly, be consistent with the date you enter into InfoNet to represent the month. For example, staff should all enter the last date of the month to represent the entire month.

Q What is the difference between Institutional Advocacy and Professional Training?

A Institutional Advocacy is advocating on behalf of a class of domestic violence victims to improve how the system responds to them. Example: explaining the benefits of implementing the Illinois Model DV Protocol for Law Enforcement to a group of police chiefs. Professional Training is providing training to professionals on

domestic violence issues, such as how to identify victims, refer victims, dynamics of domestic violence.

Q What is the difference between Public Education Services and Training Services in the Community and Institutional Services section?

A Public Education is raising awareness of participants to domestic violence issues (DV101). Professional Training would be training your participants on how to deal with victims they may encounter—issues they specifically should be aware of when they are working their own client groups and how domestic violence may impact that population.

Q What type of Board activities can be collected on the Community and Institutional Activities?

A Any activities your program wishes to track for any board.

Q For In-Service/New Staff Training in the Community and Institutional Services section, do I document the time that staff spent providing training or document the time staff spent in the training?

A You should document the amount of time your staff spend *providing* the training—NOT time spent attending training. Time spent attending a training hosted by your agency or outside of your agency may be documented in the Other Staff Activities section, if your agency wishes to track that information, but this is not required.

Q Do I enter Print Media, Radio, TV, and Internet on the Services data entry tab or the Publications data entry tab in the Community and Institutional Services section?

A If your agency is creating a product, such as print ad, PSA; etc., it should be entered on the Media/Publications tab of the database. If staff are presenting on a TV show or answering questions on a radio show, those activities would be entered on the Services tab of the database under the appropriate Public Education service category.

Hotline Calls/Information and Referral

Q What unit of measurement should I use to document time on hotline calls—minutes or hours?

A The amount of time spent on hotline calls should be documented in *minutes*, not hours. This is the only section in InfoNet where the quarter-hour system is not used.

Q How do I document a hotline call from a client?

A If an existing client calls the hotline, document it as one call, with Call Type = Hotline - has client ID. If 15 minutes or is spent with that client, you would *also* document that time in that client's Direct Client

Services Section as the most appropriate service – usually Telephone Counseling.

Q May I aggregate hotline call data at the end of the month or do I need to enter each call on its own?

A If the staff person answering the hotline calls is supported by VOCA and/or VAWA funds, you must enter that person's aggregate data separately from other staff's aggregate data.

Otherwise technically yes, you may aggregate the data for the purposes of InfoNet reporting. Remember that this may make it hard for your organization, the coalition, etc. to get an accurate sense of trends and needs, as aggregating by month will make it impossible to identify say if certain days in the month were unexpectedly busy or calm (e.g. holidays).

Other Staff Activities

Q Where do I document on-call hours that volunteers and staff provide?

A This is not required, but if your agency wishes to track this information, enter this under Services→Other Staff Activities. If you do not see “On-Call Hours” as an option in the Other Staff Activity drop-down menu, you may add it by clicking Administration → Lookup Lists → Other Staff Activities. Remember that if staff and/or volunteers respond to and serve victims during an on-call shift, those hours should be entered as direct client services.

Q If we use the List Editor to personalize our drop down list of Other Staff Activities, will we be able to change the list later?

A You may edit existing activities, but it can become increasingly challenging over time. Editing to correct spelling of an activity is fine. However, never edit one activity to reflect a different activity. For example, editing “Data Entry” to “Strategic Planning” will change all existing past records accordingly. In addition, you cannot delete any activity that has a record tied to it. You must find those records and edit or delete them before InfoNet will allow you to delete an activity. This protects any data entered under the activity you are attempting to delete.

Q Can the Other Staff Activities section be used to document time spent on individual fundraising events?

A Yes, but remember that as information you want to track becomes more specific and detailed, the more data entry is required. Before adding a very specific activity to your Lookup List, ask yourself how knowing this information in the future will benefit the program. If you can answer this question, then it may be worthwhile to spend extra

time tracking the information. Programs should always consider benefits of having more data in addition to the amount of extra resources that will be required to not only collect but also use that data when making these decisions.

Turn Aways

Q If we do not turn away any clients during a report period, do we need to enter a record of zero?

A No. If no data are entered, then Turn Away report will indicate that your agency did not turn away any victims during the report period.

Q Must I enter turn away data daily or can I wait until the end of the month to enter all turn away information?

A You may wait until the end of the month to enter all turn away data at the same time. However, consider that you will not be able to extract daily turn away information from InfoNet. If you enter on a monthly basis, you will only be able to extract monthly totals on the turn away report. Additionally, monthly data entry will remove the ability to know the number of families turned away; only the numbers of adults and children turned away can be reported.

Closing out Cases

Over the course of working with clients, it is often natural for there to be pauses in between services, as either the client is becoming more empowered and self sufficient, or alternately is facing greater hardship and is less able to utilize services. A consequence of this is that it is often unclear when to say that a client is truly inactive or a case should be closed. Over the first twenty years of InfoNet there are many clients who would appear to have been open cases since the late 1990s. Other clients have more than one case per year.

Why closing out cases is critical

Case closures are critical for capturing an accurate history of what happens to our clients. If a woman seeks help for four months and achieves her goals, only to return a year later, then it is meaningful to capture what her circumstance was at her return.

Without case closure, her return would essentially go undocumented.

Alternately, if a case is not closed and information such as income and presenting incident are captured at return, then they overwrite the original. The impact on the ground may or may not be large from this, however at the level of the coalition, InfoNet has data on approximately one million victims over twenty years, primarily Domestic Violence. Potentially important details about the patterns of return to service and de-escalating/escalating violence are lost by not capturing cases.

At the ground level however, there are also clear benefits to opening a new case:

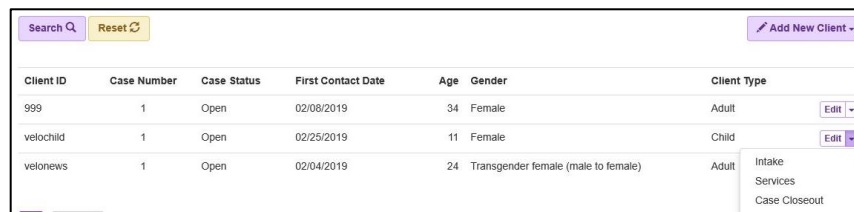
- Finding clients is easier when only active clients are in searches
- Ability to enter details about the new incident.

When to close a case

As a base guideline, any person who has not received service in twelve months should have their case closed. However, your center may determine its own rules. For example, a center may determine that they will close the case whenever they no longer expect contact (perhaps as few as six weeks of no contact), but will reopen the prior case if the same client returns in less than twelve months.

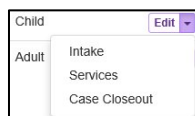
How to close a case

To close out a client, first search for the client record.

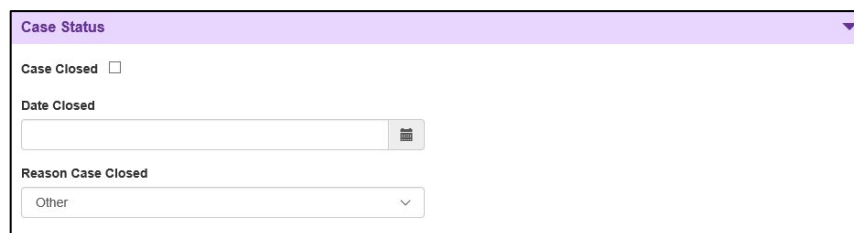


Client ID	Case Number	Case Status	First Contact Date	Age	Gender	Client Type
999	1	Open	02/08/2019	34	Female	Adult Edit
velochild	1	Open	02/25/2019	11	Female	Child Edit
velonews	1	Open	02/04/2019	24	Transgender female (male to female)	Adult Edit

Once you have search results, you may either select edit to review the client's entire record, or you may use the Edit shortcut to directly jump to the Case Closeout section.



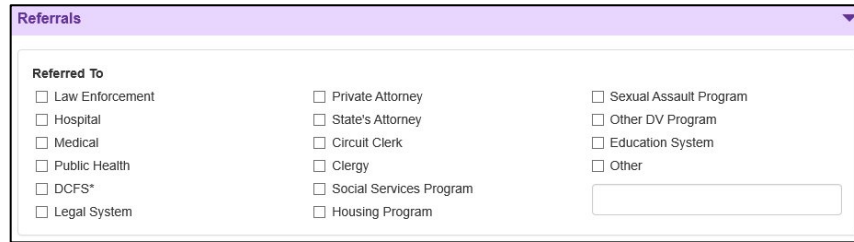
Once you have open Case Closeout, you will see an upper portion with three form items.



- *Case Closed*—a simple indicator if the case is closed/inactive, this can be checked without entering a date.
- *Date Closed*—Enter the most appropriate date for case closure according to your center policies, this could be the last date of contact.

- *Reason Case Closed*—Select the most appropriate option from the list.

Below the Case Status section is a final referrals section, indicate what if any referrals were made to the client during Case Closeout.



Referrals

Referred To

<input type="checkbox"/> Law Enforcement	<input type="checkbox"/> Private Attorney	<input type="checkbox"/> Sexual Assault Program
<input type="checkbox"/> Hospital	<input type="checkbox"/> State's Attorney	<input type="checkbox"/> Other DV Program
<input type="checkbox"/> Medical	<input type="checkbox"/> Circuit Clerk	<input type="checkbox"/> Education System
<input type="checkbox"/> Public Health	<input type="checkbox"/> Clergy	<input type="checkbox"/> Other
<input type="checkbox"/> DCFS*	<input type="checkbox"/> Social Services Program	
<input type="checkbox"/> Legal System	<input type="checkbox"/> Housing Program	

Opening a new case

If a client who previously had a closed case returns, the decision to either add a new case or to re-open their existing case must be made. While each center is encouraged to develop their own policy, there are a few clear guidelines to be observed:

1. If the client is seeking services related to the same presenting issue (and especially incident) as their prior service *and* their case was closed less than twelve months prior, then reopen the case.
2. If the client is seeking services related to a new issue, then it usually makes sense to open a new case.

To open a new case, first open the client using client search. If the client's prior case is still open despite having not received services for some time, first close that case. Then select **⊕ Open New Case** from the cases drop down,



Adult

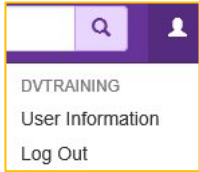
case05242017a

1 - 05/22/2017 **Closed**


1 - 05/22/2017 **Closed**

⊕ Open New Case

shown underneath the client ID on the client record. Once selected, this will open a new Intake with most fields blank, once the intake is saved, the client will have a new case.



User Information

In the upper right hand of the screen near the search bar there is a person icon (). Selecting the icon provides two options: Log Out of InfoNet (not the VPN), and User Information.

User Information

Username *

DVTRAINING

Center Name

DV Training Center

Edit Center Information

Email *

ming.xie@illinois.gov

Role	Description
DVDATAENTRY	Domestic Violence Data Entry
DVADMIN	Domestic Violence Center Admin
DATAIMPORTER	Imports data into system
DATAEXPORTER	Exports data from system

Save

Nothing to Undo

User Information allows you to update the e-mail address and user name of your user account. Please be aware that while all VPN accounts/logins are unique, the login information to InfoNet is often shared. It is important to ensure that changes to your username and e-mail are correct and mutually agreed upon before updating.

To update Username or Email, simply type over the existing answers and select save.

To update Center name, follow the link to Edit Center Information (and reference that portion of this manual).

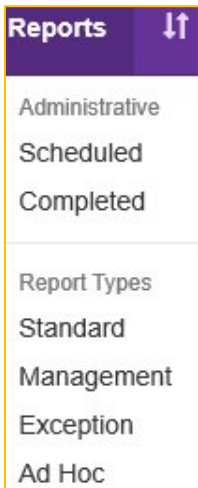
The information at the bottom of the screen under Role and Description is for reference. If something appears incorrect, for example a “reports only” user has access to Data Entry, then please contact InfoNet help and it will be corrected.

Reports

Overview of InfoNet reports

InfoNet generates reports based on the data entered, and provides options for administrative use, management, and reporting to funding agencies. Both the overview and the reports sections seek to guide the user through understanding and navigating how to run reports. For a tabulated list of the elements contained in each report, see the appendix.

Those who have access to generate reports in InfoNet include data entry specialists, direct and indirect service staff, program monitors, and agency directors. InfoNet reports can be used as a tool to ensure data entry validation, provide project analysis, and for staff and caseload management.



InfoNet Report options are accessed via the following menu options—

1. *Administrative Reports*—These reports are used by funding agencies and coalitions to coordinate with centers.
 - a. *Submit*—only available to coalition, funding agencies, etc. This allows the agency to submit a request for reports to be run for centers.
 - b. *Scheduled*—allows a center to review which reports are scheduled to run based on that center's data. (i.e. reports submitted above).
 - c. *Completed*—view previously completed reports.
2. *Report Types*
 - a. *Standard*—Provides aggregate summaries of Intake/Demographics, Services, and Medical/Criminal Justice information.
 - b. *Management*—Primarily Staff & Service Reports to review data entry/service by Staff, also Orders of Protection and specific client data extracts.
 - c. *Exception*—Provides specific reports related to likely missing/invalid data issues.
 - d. *Ad hoc*—allows advanced users to directly query their centers' data and/or access previously saved queries.

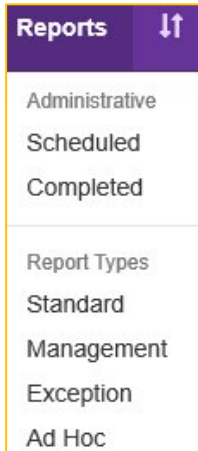
Running Standard, Management, and Exception Reports

This section runs through an example of how to use these report types and reading the output.

How to run a demographics report

To get comfortable with reporting, it is best to jump straight into running a report. Once you feel comfortable with this basic step, it is much easier to branch out and explore the full options.

Let's start by running a demographics report for women aged 22–32 years old who received services last year.



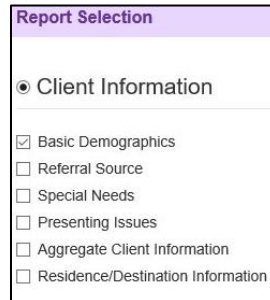
1. Open Standard Reports from the Reports menu on the menu bar.
2. Use the Date Range dropdown to pre-select the dates for the last calendar year.

A screenshot of the 'Date Range' and 'Ranges' section. The 'Date Range' section has a 'Date Range *' label, a date input field with '01/01/2018', a 'to' separator, and another date input field with '12/31/2018'. The 'Ranges' section has a dropdown menu with 'Last Calendar Year' selected.

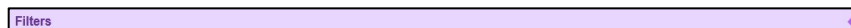
3. If applicable, select all Centers/Satellites, (many centers have a single location.)

A screenshot of the 'Center Selection' section. It has a purple header with the text 'Center Selection'. Below the header, there are two buttons: 'DV Training Center' and 'DV Training Satellite', both with a checkmark icon.

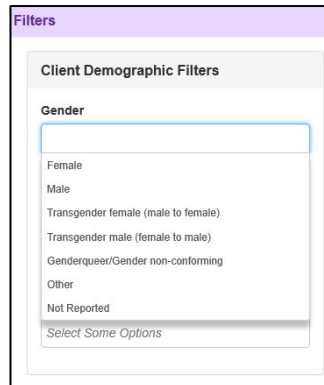
4. From Report Selection, select Client Information. Then uncheck all the checkboxes except Demographics.

A screenshot of the 'Report Selection' section. It has a purple header with the text 'Report Selection'. Below the header, there is a radio button labeled 'Client Information' which is selected. Below this, there are several checkboxes: 'Basic Demographics' (checked), 'Referral Source' (unchecked), 'Special Needs' (unchecked), 'Presenting Issues' (unchecked), 'Aggregate Client Information' (unchecked), and 'Residence/Destination Information' (unchecked).

5. Open Filters by selecting ◀. (You will find it at the bottom of the screen below a Generate button.)

A screenshot of the 'Filters' button. It is a purple button with the text 'Filters' and a left-pointing arrow icon.

6. Click inside the box for gender to see options.



Filters

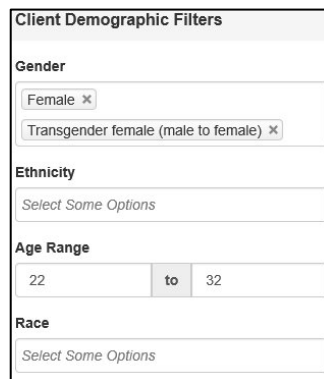
Client Demographic Filters

Gender

- Female
- Male
- Transgender female (male to female)
- Transgender male (female to male)
- Genderqueer/Gender non-conforming
- Other
- Not Reported

[Select Some Options](#)

7. Select Female and Transgender female (male to female) for Gender, then enter 22 to 32 under Age Range.



Client Demographic Filters

Gender

- Female ✕
- Transgender female (male to female) ✕

Ethnicity

[Select Some Options](#)

Age Range

22 to 32

Race

[Select Some Options](#)

8. Select Generate

Generate

9. Your report will open in a new tab of your browser.

Pointers on reading your report output

As would be expected interpreting your reports will vary greatly on which report was run. For the sake of covering a few standards in InfoNet reporting output, this section will walk through the output from the previous example.

The top of your report output will specify the name of the report and what filters were applied, including both the date range and any other additional filters.

Client Information Report

Basic Demographics

Provider Name: DV Training Center , DV Training Satellite

Report Date Range: 1/1/2018 - 12/31/2018

Applied Filters

Age at First Contact: 22 - 32

Gender Identity: Female or Transgender female (male to female)

After this initial header, comes a few summary tables. Although these will vary greatly between reports, a common element is the division of results into the categories: New, Ongoing, Total.

Total Households	10								
	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
Client Cases	2	0	2	7	1	8	9	1	10
Total Clients	2	0	2	7	1	8	9	1	10
Client Type	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
Walk-In	0	0	0	4	1	5	4	1	5
On-Site Shelter	2	0	2	3	0	3	5	0	5
Off-Site Shelter	0	0	0	1	0	1	1	0	1
Transitional Housing	1	0	1	0	0	0	1	0	1

- *New*—Clients in this column have their First Contact Date for their first Case within the reporting period, and at least one service record. This means they should be first time clients for your agency, ever, within the reporting dates.
- *Ongoing*—Ongoing clients are clients who had a First Contact Date for their first case prior to the reporting period and had service during the period.
- *Total*—this is the total number of clients who had at least one service record during the reporting period.

Note that clients with open cases and no services are excluded, whether new or not. This is true of most InfoNet reports. (See next section for example of how to identify who is excluded and possibly correct data.)

The next table in the output is the start of the main contents for this report, Basic Demographics. Note that *even though gender was filtered out of the report, InfoNet still shows the categories*. It is important to remember which filters are active for a report and copy the exact filter settings onto any other documents alongside the results to avoid miscommunication.

Basic Demographic Information (Adult and Child)									
Gender Identity	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
Female	2	0	2	7	1	8	9	1	10
Male	0	0	0	0	0	0	0	0	0
Transgender female (male to female)	0	0	0	0	0	0	0	0	0
Transgender male (female to male)	0	0	0	0	0	0	0	0	0
Genderqueer/Gender non-conforming	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0
Not Reported	0	0	0	0	0	0	0	0	0
Gender Identity Subtotal	2	0	2	7	1	8	9	1	10
Ethnicity	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
Hispanic/Latino	2	0	2	1	0	1	3	0	3
Non Hispanic/Latino	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	6	1	7	6	1	7
Ethnicity Subtotal	2	0	2	7	1	8	9	1	10

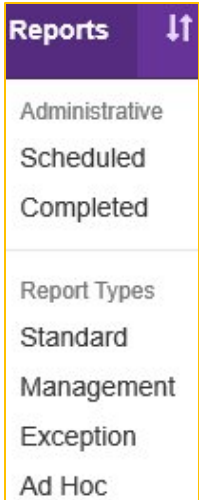
As final pointer on reporting conventions, take note of how reports output race.

Race	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
American Indian or Alaska Native	0	0	0	0	0	0	0	0	0
American Indian or Alaska Native AND Black or African American	0	0	0	0	0	0	0	0	0
American Indian or Alaska Native AND White	0	0	0	0	0	0	0	0	0
Asian	0	0	0	1	0	1	1	0	1
Asian AND White	0	0	0	0	0	0	0	0	0
Black or African American AND White	0	0	0	0	0	0	0	0	0
Black/African American	0	0	0	3	1	4	3	1	4
Hispanic/Latino	0	0	0	0	0	0	0	0	0
Native Hawaiian or Other Pacific Islander	0	0	0	0	0	0	0	0	0

Because InfoNet allows one individual to identify with multiple specific race/ethnicities, depending on the report you may see all options included. Often you will want to re-categorize based on the question or audience you are presenting to, for the sake of being concise.

Using an Exception Report

As mentioned above, almost all Standard and Management reports in InfoNet exclude clients who have not received a service (e.g. counseling, shelter, etc.) within the dates selected. In practice, it is good to keep the number of individuals who have open cases but are not receiving services to a minimum. Among other reasons, it is generally acceptable to enter service hours for the intake interview/process itself, so if there is a complete intake, there is likely a missing service.



Exception reports can help in identifying likely data entry issues, such as client records that were created but never received any service hours or shelter stays that are very long. In both cases those situations are often (but not always) related to missing services or missing exit dates.

As a second example, we will run an exception report to review clients without services.

1. Open the Reports top level menu, then select Exception.
2. Within the Exception Reports screen, first select one or more locations. Generally, for the clients without services report, it makes

sense to select all locations.

3. In the next section, select Clients without a Service Record.

4. Select HTML to view the report online, and then Generate.

5. The report will open in a new tab or window of the browser.

Client ID	Case ID	First Contact Date
00111C	1	10/1/2005
0011C	1	10/1/2005
001a	1	4/30/2001

6. To use the report, you may wish to review each client. Clients with no services are often clients who completed an intake but immediately left, in which case you may enter the intake service and close the case. Other frequent possibilities however include clients who were created by accident and are essentially duplicates of other clients. These cases can be “deleted” or overwritten with incoming clients. Finally, it sometimes occurs that a client has in fact been receiving services, but those services have not been entered. In this case you will want to review the file with all other staff working with the client to ensure all missing services are entered.

Using Reports—Options and Conventions

Most reports provide several options related to filtering which data is being reported on and what format it will be provided in. We already used most of these in the example, however it helps to learn more details.

Date Filter and Date Range

At the top of the screen, like many other screens in InfoNet there are controls to filter by date, or to select a typical set of relative dates quickly (e.g. last quarter).

The screenshot shows two adjacent form fields. The left field is titled "Date Range *" and contains a date input with "01/01/2018", a "to" separator, and another date input with "12/31/2018". The right field is titled "Ranges" and contains a dropdown menu currently showing "Last Calendar Year" with a downward arrow.

Output Type

Reports are available in three formats, and in the case of CSV there may even be additional output as well.

The screenshot shows a dropdown menu labeled "Output Type". The menu is open, showing "PDF" as the selected option with a downward arrow. To the right of the dropdown is a gear icon, which is a settings or configuration button.

- *HTML*—This is the format of a web page, Hyper-Text-Markup-Language. If selected, the report will open in a new browser window (best for quickly reviewing aggregate data).
- *PDF*—This provides the exact same information as HTML but in PDF format (best for printing and/or saving). PDF, Portable Document Format, is often called Adobe PDF as Adobe created its initial versions. It is now an open standard for electronic documents, which makes it especially good for final versions that will not be edited so they will look the same on all computers. PDF output has additional options to format the output to different page sizes (e.g. Legal, Letter, A4) or landscape page orientation accessible in the ⚙ gear icon that appears next to PDF when PDF is selected.
- *CSV*—Selecting this option will save a special text-based file to your computer. CSV, Comma Separated Value, is readable/importable in almost all data applications such as Excel, SPSS, and other statistical and database products.

Notes on CSV:

1. CSV files will often contain additional tables with raw data from InfoNet. For Instance, the client demographics report in HTML/PDF does not contain any client level data, however the CSV provides a listing of clients with their demographics. It also contains the other

tables. This is intentional as CSV users are most often intending to process data in Excel or SPSS.

2. InfoNet provides valid CSV files but *does not* conform to the convention of each file having a single header row and no blank lines. Specifically, InfoNet outputs a single CSV file even if it contains multiple tables. In this case separate tables will be separated by a blank row and a new header. If you intended to process data, you will likely need to separate the tables into separate files before importing/running calculations.

Center Selection

Many InfoNet users have multiple centers within a single agency, e.g. Centers and Satellites. Center selection provides the ability to select which Centers' data will/will not be included in the output. Yellow indicates your main location, blue indicates a Satellite/secondary location.

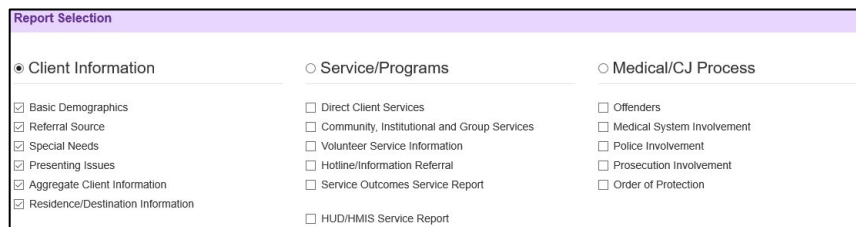


Center Selection

☒ DV Training Center ☐ DV Training Satellite

Report Selection

This provides a checkbox system to indicate what report you want to run and which options/optional data you want included.



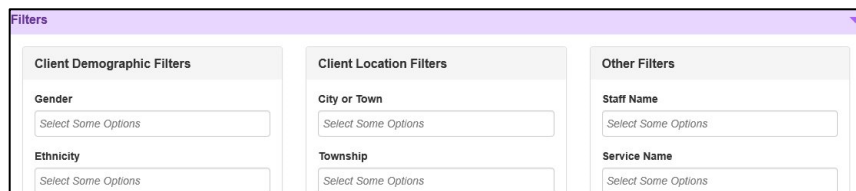
Report Selection

<input checked="" type="radio"/> Client Information	<input type="radio"/> Service/Programs	<input type="radio"/> Medical/CJ Process
<input checked="" type="checkbox"/> Basic Demographics	<input type="checkbox"/> Direct Client Services	<input type="checkbox"/> Offenders
<input checked="" type="checkbox"/> Referral Source	<input type="checkbox"/> Community, Institutional and Group Services	<input type="checkbox"/> Medical System Involvement
<input checked="" type="checkbox"/> Special Needs	<input type="checkbox"/> Volunteer Service Information	<input type="checkbox"/> Police Involvement
<input checked="" type="checkbox"/> Presenting Issues	<input type="checkbox"/> Hotline/Information Referral	<input type="checkbox"/> Prosecution Involvement
<input checked="" type="checkbox"/> Aggregate Client Information	<input type="checkbox"/> Service Outcomes Service Report	<input type="checkbox"/> Order of Protection
<input checked="" type="checkbox"/> Residence/Destination Information	<input type="checkbox"/> HUD/HMIS Service Report	

As an example, this is the view from Standard Reports. Here there are three available types of reports (Client Information, Services/Programs, Medical/CJ Process), each with additional options available via the checkboxes below it.

Filters

Unlike the prior elements, the Filters menu appears below the Generate button, and can therefore be easily overlooked. It is also collapsed by default



Filters

Client Demographic Filters	Client Location Filters	Other Filters
Gender <input type="text" value="Select Some Options"/>	City or Town <input type="text" value="Select Some Options"/>	Staff Name <input type="text" value="Select Some Options"/>
Ethnicity <input type="text" value="Select Some Options"/>	Township <input type="text" value="Select Some Options"/>	Service Name <input type="text" value="Select Some Options"/>

and needs to be expanded with the ▼ to view the available options. What is specifically available for selection will vary by what report is selected.

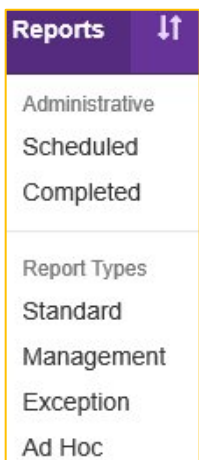
Ad Hoc Reporting

Ad Hoc Reporting allows centers to pull their raw data from InfoNet securely. It is however powerful and can be used very effectively by those interested in learning how to use this advanced tool.

Warning: Remember that client level data must remain confidential and should not be released outside your organization. Delete any saved files once they are longer needed, and if it is desired to keep files long term, use encryption such as password protecting the file in excel.

Example query: Other Presenting Issues

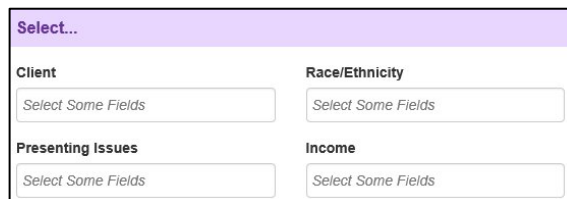
“Other presenting issues” are not reportable anywhere in Standard, Management, or Exception reports, yet they can be reported quickly from Ad Hoc.



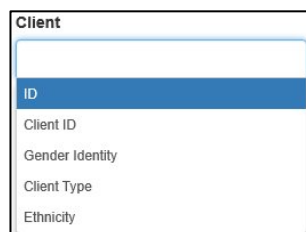
1. Select Reports > Ad hoc
2. Select Client Perspective from the ‘From Perspective of...’



3. Select data points



- a. ID from the Client Box



- b. Race/Ethnicity from the Race/Ethnicity box
- c. Primary Presenting Issue, Primary Offense Date, Rape or Sexual Assault, Adult Survivor of Incest or Sexual Assault,

Stalking, Harassment, and Physical Domestic Violence from Presenting Issues.

The screenshot shows a query builder interface with four main sections: **Client**, **Race/Ethnicity**, **Presenting Issues**, and **Income**. The **Client** section has an 'ID' filter. The **Race/Ethnicity** section has a 'Race/Ethnicity' filter. The **Presenting Issues** section includes 'Primary Presenting Issue', 'Primary Offense Date', 'Rape or Sexual Assault', 'Adult Survivor of Incest or Sexual Assault', 'Stalking', 'Harassment', and 'Physical Domestic Violence'. The **Income** section has a 'Select Some Fields' filter.

4. Select Run It! from the upper right hand corner.



Depending on how many clients your agency has, it may return quickly or you may need to wait for results. (You may even receive a warning from your browser). You now have a downloadable list of all clients, their ethnicities, and their presenting issue(s), which can easily be opened and worked with in excel. Also, as you can see, it would not be too hard to add age or a few other details to the report.

Adding Filter for Dates to the Example Query

Note that our example will show all clients in InfoNet, including those with no services ever, closed cases, or even individuals who were last served 15 years ago. While this makes ad hoc reporting great for data quality checks and custom reporting, it also makes it hard to compare with the InfoNet standard reports.

To add date ranges to the above example report, repeat steps above, except before selecting Run It!, navigate to the Where box at the bottom of the screen.

A purple header box labeled 'Where...' with a dropdown arrow. Below it is a white box containing a '+ Condition' button, a '(...)' button, and 'and'/'or' buttons.

Here we will create a filter by selecting +Condition to add a new Condition.

Inside the Where... box a data entry point will appear with *Select a Field* written inside. When you type in this field, it will filter for data elements in InfoNet similar to what you type, and organize the output by the area of InfoNet. In this example, we type date, and then scroll down the options until we find Date under Direct Service.

Once we select Date, ad hoc reporting gives us a drop down to select a logical rule, here we select *is between*. Once we select this ad hoc reporting will allow us to select start and end dates for direct service. Unlike Standard reports, Ad hoc reporting does not have presets for the current quarter, etc.

After selecting these dates, you may click Run It! and the report will return for only individuals who had service records between the selected dates.

Using Ad Hoc Reporting

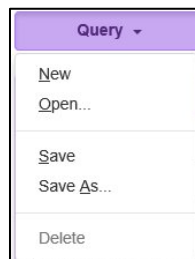
Most modern databases, including InfoNet are built out of a set of structured tables. Essentially, it is many excel spreadsheets with certain rules applied. Like most spreadsheets, the columns are labelled at the top.

When you create an ad hoc report, all you are doing is telling it which columns you want (types of data), and which rows you want (i.e. which clients).

To illustrate, we'll step through the parts of the Ad hoc reporting screen again.

1. When you first open Ad hoc Reporting, it may momentarily have all parts collapsed, making it easy to get an overview. The basic parts are:

- 1.1. *Query*—used to open existing or save your own queries
 - 1.2. *Perspective*—what types of data elements are you looking for
 - 1.3. *Select*—which data elements do you want included in the report
 - 1.4. *Where*—what filters do you want applied
 - 1.5. *Query Name*—if saving you can title the query/report here
 - 1.6. *Run it!*—after setting the rest, you can run it here.
2. Query. Once you have defined one or more queries/reports that work well for you, you will want to save them and open them again. The query menu gives you this ability.



If you select Open, it will show a menu of any previously saved queries. This can also be a location for InfoNet staff to build and save queries for your center to use.

Open Query...				
Name	Last Modified	Run Count	Last Run	
Housing service stays with residence + previous service use	10/16/2018 11:11:42 AM	1	10/16/2018 11:11:49 AM	Open
Test Demographics Query filtering ClientID	2/28/2019 8:38:40 AM	0		Open

You can also use the Save, Save As, and Delete as you would on a computer, except that they will be saved to InfoNet for future use from this menu.

3. Perspective can sound confusing however it becomes clearer if you think about the work you would have to do to do this manually. As mentioned, databases are basically just a group of spreadsheets or tables. Perspective means “which set of spreadsheets do you want to look at right now, the ones about the center, the ones about the center’s clients, or the ones about your staff?”

The confusion here comes because we intuitively think everything is linked together. The problem that can eventually occur is that many pieces of information are not linked together or linked together in different ways in different places. For example, community services are connected to Centers and Staff but not Clients.

As a result, InfoNet needs to know what a query is *most* about, clients, centers, or staff. This helps both for showing options that could make sense, and for structuring the output.

4. Select is where you finally get to say what data to include in the report. After you select a perspective, InfoNet will show a grid of cells, each cell indicates a table/spreadsheet that InfoNet stores about that thing.

For example, here are the options for the client perspective.

The screenshot shows a dropdown menu titled "Select..." with a list of database tables organized in a grid. Each table name is followed by a "Select Some Fields" button. The tables are categorized by perspective (Client, Presenting Issues, Referred To, Behaviors at Intake, Severity of Abuse, Order of Protection > Activity, Sentence, Housing Service, Household, Group Service > Staff > Funding).

Client	Race/Ethnicity	Residence	Client Case
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Presenting Issues	Income	Benefits	Referred By
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Referred To	Special Needs	Services Needed	Services Received
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Behaviors at Intake	Behaviors at Outtake	Previous Service Use	Police/Prosecution
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Severity of Abuse	Police/Prosecution > Court Appearance	Medical	Order of Protection
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Order of Protection > Activity	Offender	Police Charge	Trial Charge
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Sentence	Direct Service	Direct Service > Residence	Direct Service > Funding
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Housing Service	Housing Service > Residence	Departure	Cancellation/No Show
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Household	Household > Member	Group Service	Group Service > Staff
Select Some Fields	Select Some Fields	Select Some Fields	Select Some Fields
Group Service > Staff > Funding	Group Service > Attendee	Group Service > Attendee > Residence	
Select Some Fields	Select Some Fields	Select Some Fields	

Each cell indicates a database table. Start by asking yourself, “What am I actually looking for?” You will almost always want to select Client ID from the Client table. In a real sense this is the link between all the tables when in the “Client Perspective.”

You will often find it more productive to write out the question and then look at the screen. For example, I want to know which clients are in households. Then I might select Client ID from Client and find Household, then select Household Id. This would give me a list of all clients and their household ID (if any).

While writing out the question first helps focus the query, you will also find that you may need to look into what is actually stored. To do this, select a cell, then it will show you a dropdown menu of what fields are stored in that table/spreadsheet.

Opening, saving, and running queries cannot harm your data, and will help you to learn the ad hoc process. If you come in with a few basic specific questions, and try a few things out until you answer them questions, then it will empower you for future use.

- 4.1. By default, Select... opens in Data mode, which provides raw data extracts. We recommend you learn in Data mode and process data in excel initially. Once you are a bit comfortable with the system, however, you are encouraged to explore Pivot mode. To enter Pivot mode, select pivot in the lower right corner of the Select window.

Select...

Column Headers

Select Some Fields

Row Headers

Select Some Fields

Count Unique *

Client: ID

data

pivot

- 4.2. Pivot mode has a simpler interface and produces a cross tabulation of the data selected in the columns, the data selected in the rows, aggregated by counting the data select in the Count Unique box.
- 4.3. As an example, let's run a pivot query on primary presenting issue by Race/Ethnicity. If we select Primary Presenting issue in the column header, Race/Ethnicity in Row headers, and leave the default Count Unique selection as Client ID, this gives us nice readable crosstabulation of clients.
- 4.4. A few pointers on using Pivot mode:
 - 4.4.1. You will almost always want to leave the Count Unique on Client ID. If it is not an ID reflecting a unique instance of something like people, it could get a bit confusing/misleading. Some exceptions exist, for example it could make sense to count

Primary Presenting Issue					Totals
Race/Ethnicity	Emotional Domestic Violence	Physical Domestic Violence	Sexual Domestic Violence	—	
American Indian or Alaska Native	15	27	1	41	80
Asian	41	71	14	141	250
Black/African American	101	125	27	358	552
Hispanic/Latino	1	2	0	0	3
Native Hawaiian or Other Pacific Islander	2	6	0	4	12
White	52	154	8	235	410
Unknown	32	110	7	234	346
Totals	238	480	54	996	1613

Unique Client ID Counts

Cases instead of clients, or conceivably you may want to count client residences.

4.4.2. You don't need to define a column and a row header, you can use the pivot to get a quick count of responses to a single question.

Primary Presenting Issue	Emotional Domestic Violence	Physical Domestic Violence	Sexual Domestic Violence	—	Total
	238	480	54	996	1613
Unique Client ID Counts					

4.4.3. Selecting multiple elements in the row/column headers works fine but likewise gets too complicated quickly.

5. Where... is used like this: Select/report clients where their gender identity is transgender. It is a filter function to modify any of the above.

5.1. As an example, let us set a filter for individuals who selected transgender, queer/nonconforming.

5.1.1. If not expanded already, open the Where section.

5.1.2. To add a filter, select **+**Condition, this will add an element into the box entitled Select Field... which is a dropdown of all possible elements for the perspective, e.g. client elements.

5.1.3. Select Gender Identity from the dropdown.

5.1.4. Once you select an element, InfoNet will give a list of options available to filter on that element based on its data type (e.g.

dates and numbers have specific options). For our purposes select is any of.

5.1.5. This will then show possible values for the element, and you can select multiples. For our case, we will select both Transgender options, Genderqueer, and Other. They are selected one at a time.

5.1.6. That's it. If we now run a query above, it will be filtered to only include clients whose Gender Identity was one of these for options.

5.1.7. Tips for where:

5.1.7.1. First a warning! Presently the output report will not show the filter settings, so be sure to label any output files or queries appropriately to ensure that no one mistakes a filtered output for an unfiltered one, or confuses first

The image shows two screenshots of a software interface for creating filters. The top screenshot shows a 'Where...' dialog box with a dropdown menu for 'Client: Gender Identity' set to 'is any of'. A list of options is displayed on the right: Female, Male, Transgender female (male to female), Transgender male (female to male), Genderqueer/Gender non-conforming, Other, and Not Reported. The bottom screenshot shows the same dialog box with four options selected: Transgender female (male to female), Transgender male (female to male), Genderqueer/Gender non-conforming, and Other. The 'and' button is highlighted.

quarter with fourth quarter reports.

5.1.7.2. You may add multiple conditions using And/Or. This can help you build fairly sophisticated filters, for example you could select participants who either had a service in the last quarter OR had presenting issue date in the last month.

5.1.7.3. The ellipsis symbol may be used to set sub conditions, e.g. if Client is genderqueer and client is under twenty-one OR if Client is other and over forty.

Going further with Ad Hoc Reporting

Ad hoc reporting is powerful, and it also has a learning curve. Trial and error is expected and good. You *will* select something like ID from the Household > Member table, not know what it means or what to do with it. That is fine.

If you start with a few basics and then build upon that foundation, it will be easier to build your skills. Also, you are strongly encouraged to “play around”, it is your center’s data and you cannot hurt it by running a query. (Remember to use extreme caution when saving files however.) If you are interested in additional information or training about how to use Ad hoc Reporting, please

contact ICJIA/InfoNet help and we will provide options, including online trainings.

Administrative Reports

The Administrative Report Utility facilitates reporting to the Illinois Coalition Against Sexual Assault, the Illinois Coalition Against Domestic Violence, and the Illinois Department of Human Services by automating report generation, submission, and approval. The Administrative Report Utility allows the Coalitions and IDHS to electronically request reports, review reports, and receive report approval from agency directors. It provides agencies with automatic notification that reports have been requested, a link to review reports, and the ability to electronically approve reports.

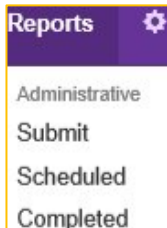
Overview of Administrative Reports process

In order to introduce the various screens to follow, it is very helpful to have a sense of the overall workflow.

- 1) The Coalition or IDHS will *submit* an electronic request to the InfoNet database for Standard Reports (Demographic, Services or Medical/Criminal Justice Information).
- 2) A notification will be posted in InfoNet for each agency and/or satellite included in the request. This will be visible on the System Message Page and reviewable on the Scheduled Reports page. The notification will include information such as the type of report requested, the report period, and the date the report is scheduled to run.
- 3) Agencies, if requested, will review the report and approve/reject the report. Approval indicates that the Agency feels the data in InfoNet and the report are accurate and up to date. Rejection indicates that the Agency does not feel the report is accurate or complete. The agency may make comments within InfoNet
- 4) The Coalition/Funding user will receive a notification and review the report and comments within InfoNet.
- 5) All users will retain access to the final reports unless they choose to delete them.

For privacy reasons no single user will ever see all the screens involved in this process, as there are always two parties, the Coalition or Funding user (e.g. DHS, ICADV) and the center(s).

Submitting Reports



Only select coalition users have access to schedule reports for other centers, the Administrative Reports workflow begins when they Submit reports. Submit in this case, mean submit for processing.

To schedule a report, navigate to the Reports Menu, Administrative, and then Submit. (Again, this is only visible to coalition users, who do not have direct access to client records)

 A screenshot of the 'Submit Reports' form. At the top, there are fields for 'Date Range' (with 'to' and a calendar icon), 'Ranges' (a dropdown menu), and 'Run Date' (03/08/2019). Below these are 'Batch Report Title' and 'Center Actions' (radio buttons for 'No Action', 'Review', and 'Approve'). A 'Jobs' counter shows '0'. A 'Help' button is on the right. The main section is divided into two panels: 'Center Selection (0)' and 'Funding Filter (0)'. The 'Center Selection' panel has radio buttons for 'Aggregate All', 'Aggregate By Center', and 'Individual', and a list of centers with checkboxes. The 'Funding Filter' panel has radio buttons for 'Aggregate' and 'Individual', a note '* Indicates funding source is no longer active', and a list of funding sources with checkboxes.

Once selected, this will open a unique reporting screen. The top portion controls date range, the schedule date, the title of the report as coalition users will see it, and what action they should take. The middle section allows selection of which Center(s) will be included and what, if any, funding filter to apply. Funding, Date, and Center are the only filters available to coalition users because the interface is intended for aggregate reporting and not for review of all data (which belongs to the respective centers).

The lower portion is identical to the Standard Reports options all users see.

 A screenshot of the 'Report Selection' form. It has a title bar 'Report Selection'. Below it are three columns of checkboxes. The first column is 'Client Information (0)' with options: Basic Demographics, Referral Source, Special Needs, Presenting Issues, Aggregate Client Information, and Residence/Destination Information. The second column is 'Service/Programs (0)' with options: Direct Client Services, Community, Institutional and Group Services, Hotline/Information Referral, Volunteer Service Information, Turn Away Information, Service Outcomes Service Report, and HUD/HMIS Service Report. The third column is 'Medical/CJ Process (0)' with options: Offenders, Medical System Involvement, Police Involvement, Prosecution Involvement, and Order of Protection.

A few pointers are worth noting on the functionality on this screen:


- 1) *Date Range, Ranges*—These work the same as the rest of the system and filter for clients who received services within the time frame. Ranges allows quick selection of common relative dates, e.g. Last Quarter.

- 2) *Run Date*—The date on which the report will officially run. This is often used to submit a bit in advance so that Centers are notified the report will run *and* review/correct the data if necessary.
- 3) *Batch Report Title*—The title that the centers will see on the notification.
- 4) *Center Actions*—Whether the center will be requested to review the report, approve the report, or merely informed that it will run.
- 5) *Jobs*—This is not a data entry field, this indicates how many reports are currently running/queued.
- 6) *Center Selection*—This allows for the selection of specific centers. It has quick select buttons for selecting all centers and satellites, all centers, or all satellites. It also has three options for how output will be grouped.
 - a) *Aggregate All*—Provides only overall statistics for all selected
 - b) *Aggregate by Center*—Each Center and its respective Satellites will be grouped/aggregated together.
 - c) *Individual*—Each individual location will be shown.
- 7) *Funding Filter*—This option allows selection of only services funded by selected sources. Note that this list only shows funding sources related to the funder/coalition who is submitting the report.

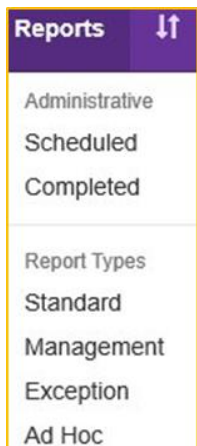
Upon selecting Submit, the report will be scheduled, and notifications sent to the respective Center(s).

System Message Page

The System Message, which is the page you see immediately after logging into InfoNet, provides a summary of reports that have been requested by the Coalitions or IDHS that need to be approved.

<p>Welcome ICJIA InfoNet Users!</p> <p>Thank you for helping victims become survivors. Your compassion, hard work, and resilience are most appreciated and make Illinois communities better. Helping people work toward their goals for dealing with the aftermath of trauma and healing – this is some of the most critical and challenging work of our state. Our goal is that InfoNet 2.0 supports you, your organization, and your clients to the greatest extent possible.</p> <p>If you need technical assistance, have questions or concerns, or want to offer suggestions for improving the InfoNet system, please contact ICJIA's InfoNet Team:</p> <p>cja.infonethelp@illinois.gov 312-793-8550</p>	 <p>ILLINOIS Criminal Justice Information Authority</p> <p>Visit ICJIA Website</p>
<p>Report Approval Needed</p> <p>POSTED March 8, 2019 NEW</p> <p>ICADV Administration has generated a report for your approval: Example Admin Report.</p> <p style="text-align: right;">Approve/Reject</p>	

If you select the button on the notification (Approve/Reject) you will be taken directly to the relevant screen to get more details.



Reviewing Scheduled Reports

You may review scheduled reports by navigating to the Reports menu and selecting Scheduled.

Scheduled Reports

Run Date	Center Action	Report Title	Submitter	Begin Date	End Date	Type	Center(s)	Funding Source	
3/8/2019	Approve?	Example Admin Report	ICADV Administration	1/1/2018	12/31/2018	Demographics	(Misc. Related Agencies)	(No Filters)	HTML

Ready Running Error - Will Retry Failed 1 10

Displaying 1 to 1 of 1 Record

This will show you a summary of any reports that are scheduled, including which centers are included, what date it will run, and what action is expected. By clicking the arrow on the right-hand side of the row ↕, you may expand this entry to view a bit more detail (see Completed Reports section for example).

Scheduled Reports is useful for knowing when reporting agencies expect data to be reviewed/updated. This may help your agency schedule the appropriate resources both to enter/audit any client data as well as to be available to approve the final report.

Completed Reports

The Completed Reports screen shows all administrative reports that have been generated. This includes previously approved reports, reports for review, rejected reports, and those reports still awaiting approval/rejection.

Completed Reports

Center Approval	Center Approval/Rejection Date	Center Comments	Run Date	Report Title	Submitter	Begin Date	End Date	Submit Date	Type	Center(s)	Funding Source	
Approve?			3/8/2019	Example Admin Report	ICADV Administration	1/1/2018	12/31/2018	3/8/2019	Demographics	(Misc. Related Agencies)	(No Filters)	HTML

1 10

Displaying 1 to 1 of 1 Record

Any report may be viewed online in its entirety by selecting the HTML button. The arrow ▼ within the HTML button may be used to instead download a .csv or .pdf file.

Additional details about the report, such as Type and Centers may be viewed by selecting the arrow outside the HTML button. This will expand the summary.

Completed Reports

Center Approval	Center Approval/ Rejection Date	Center Comments	Run Date	Report Title	Submitter	Begin Date	End Date	Submit Date	Type	Center(s)	Funding Source
<input style="background-color: yellow;" type="button" value="Approve?"/>	3/8/2019		Example Admin Report	ICADV Administration	1/1/2018	12/31/2018	3/8/2019	Demographics	(Misc. Related Agencies)	(No Filters)	<input type="button" value="HTML"/>
Type		Center(s)		Funding Source							
Basic Demographics		Oasis Womens Center									

1 10 Displaying 1 to 1 of 1 Record

Finally, if there is a yellow “Approve?” button, it may be selected to open the report for Approval/Rejection. This will open a pane inside your window, showing a preview of the report (click HTML button to open the full version). Below the preview is a line for entering a comment and buttons for both Approve and Reject. Selecting either of these buttons will submit the approval or rejection along with the comments back to the Coalition or funding agency.

Status: Approve?

Example Admin Report

Basic Demographics

Provider Name:
Report Date Range: 1/1/2018 - 12/31/2018

Total Households 1,245

	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
Client Cases	538	165	703	419	123	542	957	288	1,245
Total Clients	538	165	703	419	123	542	957	288	1,245

Client Type	New			Ongoing			Total		
	Adult	Child	Total	Adult	Child	Total	Adult	Child	Total
Walk-In	512	127	639	402	110	512	914	237	1,151
On-Site Shelter	24	38	62	16	13	29	40	51	91
Off-Site Shelter	1	0	1	1	0	1	2	0	2
Transitional Housing	1	0	1	0	0	0	1	0	1

Basic Demographic Information (Adult and Child)

Comment:

After approval/rejection, the report as reviewed will remain visible on the Completed Reports screen for both the Coalitions and the individual providers.

Completed Reports											
Action	Center Approval	Center Approval/ Rejection Date	Center Comments	Run Date	Report Title	Begin Date	End Date	Submit Date	Type	Center(s)	Funding Source
<input type="checkbox"/> Delete	Rejected	3/8/2019	This is not real data.	3/8/2019	Example Admin Report	1/1/2018	12/31/2018	3/8/2019	Demographics	(Misc. Related Agencies)	(No Filters)

Note that the Coalitions may choose to delete rejected reports after an appropriate amount of time.

Reporting questions and answers

See also Tool for Evaluating InfoNet Reports: Client Information and Services developed by IDHS.

Q What if none of the available Standard or Management Reports give me the number(s) or the information I need, but I know the information is entered into InfoNet?

A Contact the InfoNet help desk at 312-793-8550 or CJA.InfonetHelp@illinois.gov. ICJIA staff can generate a custom query for you.

Q Can I keep data on services provided by each location/site separately? Will I still be able to run a report on total program statistics?

A Separate logins (user name and password) for each location are required to extract data for each location/site managed by your program. When entering services for each location, log in using the corresponding location's user name and password. Then when running a report, select the appropriate location(s). This allows you to run a report for each location individually, all locations collectively, or any combination thereof.

If your program has multiple locations and would like this ability, but does not currently have it, contact the InfoNet help desk at 312-793-8550 or CJA.InfonetHelp@illinois.gov to discuss.

Q Is there a way to generate a report of Orders of Protection by their expiration dates?

A Yes. Run a **Management Report → Orders of Protection Report** based on the OP's expiration date field. This report will display all OPs scheduled to expire during the time period you specified. Note that future dates are acceptable for this report, and this can be an excellent tool for following up with clients who have an OP expiring soon.

Q When I review my Client Information Report, I notice that there are some “adult” records in the “child” age categories of the report. What may cause this?

A If you have a primary victim of domestic violence who is a teen, you may have opened that client as an adult even if she was only 13, 14, 15, etc. She would show up in the “adult” column as a 13 yr old, 14 yr old, etc. On other occasions, younger children may be entered as adults if they are provided service without a related adult receiving service. If neither of these are the case, you may have data entry errors. Run a **Management → Client Detail Information Report** for the same time period. Apply a **Client Type=Adult** filter and an **Age 0-17** filter to see the ID numbers of these clients. Any client entered under the wrong client type is an error and should be corrected.

Q How do I determine how many hours of service were provided by volunteers?

A Run **Standard Reports→Service/Programs**. The last table of this report displays service information for only volunteers. For this table to be accurate, however, volunteers must have been entered on the **Administration → Volunteer** tab. If you are not sure that all your volunteers were entered on this tab, you have a second option. Run **Standard Reports → Service/Programs** using the **Staff** filter. Make sure you select all the volunteer names/groups to be included in the filter.

Q How do I obtain the number of orders of protection filed in each county?

A **Standard Reports→ Medical/CJ Report → Order of Protection Report→** filtered by **County**. Please note that this report will filter records based on the client’s county of residence, NOT the county court in which the OP was filed. In most instances, the number will be accurate because most victims file for an OP in the same county they live in. However, there may be instances when a client files for an OP in a different county court. If this causes concern and you need a report that displays the number of OPs by the county court they were filed in, contact ICJIA’s Help Desk at 312-793-8550 or CJA.InfonetHelp@illinois.gov.

Q In the Medical/CJ Order of Protection report, does the number of OPs filed include the number of OPs that were upgraded?

A Numbers of Orders of Protection filed (by status) and OPs issued (by type) during the reporting period are displayed in the first section of the report (New Orders of Protection), whether they were subsequently upgraded or not. Numbers of existing OPs that were *upgraded* during the reporting period are displayed in the second

section of the report by the type of upgrade (Upgrade in the Type of Order).

Q How do I obtain the number of shelter days provided for clients from a specific county?

A **Standard Reports→Services/Programs→Direct Client Services→filtered by County.**

Q How can I obtain our duplicate client count or caseload for a specific period?

A To obtain the duplicate client count for a specific period, you must run a Client Information Report (Demographics only) for each month (or quarter) within the period and add the number of total clients served among all the reports. These totals will give you the duplicated client count for a given period of time.

Q Group service data are displayed on two sections of the Standard Services Report – the Direct Client Services section and the Community, Institutional and Group Services section. Should these two sections reflect identical numbers of service hours?

A No, because the numbers reflect different things. Direct Client Service reports the total number of service hours provided to *clients* under each ID number. Community, Institutional and Group Services reflects presentation (or session) length time and staff time spent on those group sessions. For example, if two staff persons co-facilitate a 1-hour Adult Group Counseling session to five (5) clients:

In the **Direct Client Service** section of the report, you will see five (5) Adult Group Counseling hours, because five (5) clients received an hour of service. Five (5) clients x one (1) hour = five (5) client service hours.

In the **Community, Institutional and Group Services** section, you will see one (1) Presentation Hour because this represents the session length no matter how many clients attended or how many staff facilitated the session. You will also see two (2) Staff Conduct Hours because even though the group service lasted just one (1) hour, two (2) staff persons provided service for that full hour.

Q Similar to the question above, should these two sections reflecting group service data display identical numbers of clients and participants?

A Most of the time, these numbers will not match because the **Number of Participants** field on the Group Services page is not tied to specific clients. Therefore, the number of participants will be higher, often much higher, because it duplicates clients who received group services more than once. Clients are NOT duplicated in the Direct Client

Services table where it shows the number of clients who received each group service. For example, if you have two (2) group sessions with five (5) clients each but the same five (5) clients attended both group sessions, you would have five (5) clients who received service on the Direct Client Services table. However, you would see ten (10) participants [two (2) presentations x five (5) participants each] when you review these same service contacts in the Community, Institutional and Group Services table. *Also see the evaluating reports tool at the end of this section.*

Q Why would a report show service hour totals that are not in .25 hour increments?

A This should only occur if a **Funding Filter** is applied to a report. For example, if a VAWA grant pays for 33% of a staff person's service time, a Standard Service Report with a VAWA filter will display .33 hours for every hour of service this person provided. If you are seeing this even when no funding filters are applied, please contact the ICJIA help desk for assistance at 312-793-8550 or CJA.InfonetHelp@illinois.gov.

Q On the **Standard Report→Client Information Report**, should the total clients and total cases reflected on the report be identical?

A Yes, if the report's timeframe is for one year or less. If the report is for one year or less, and you see a greater number of cases than number of clients, then someone may have mistakenly added a new case for a client when they should not have. Remember that you should not enter an additional case for a client unless that person has not received services in at least one year. To delete unnecessary cases, contact ICJIA for assistance at 312-793-8550 or CJA.InfonetHelp@illinois.gov.

If the report reflects activity for more than one year, the number of cases may be slightly higher than the number of clients because some clients may have more than one case. If you served a client that had two cases, both cases may be counted, but she would only be counted as one client (one person served).

Q Why would the total number of clients reflected on the Client Information Report not be equal to the number of clients served (direct service subtotal) on the Direct Client Service Report?

A It is possible that a client that has an On- or Off-Site Shelter or Transitional Housing service for the period, but no documented direct services, such as counseling or advocacy. To identify such clients, run a **Management→Client Detail Information Report** with the Service Name box checked. Scroll down and look for a client ID number with

only one service contact that is a Shelter or Transitional Housing service. These are clients that probably should have additional service contacts entered under their record, as most clients in shelter are also receiving some direct services. The following are common sources of these error types:

Did you document any infants in shelter that never had a direct client service documented? Remember that time spent doing an intake on an infant should be entered under the child's ID number as Individual Children's Counseling. If you documented the client as being in shelter and no other service was provided, the client would be counted in the Client Information Report as being served, but would not be counted in the Direct Client Service report subtotal for receiving services.

Run the **Exception Report → Open and Lengthy Shelter Entries**. This may help identify clients that left shelter and never updated with a Shelter End Date.

Were any On- or Off-Site Shelter records entered by mistake? If you entered On- or Off-Site Shelter for a client not currently receiving services, then they would be counted as receiving shelter but have no other direct client services for the period.

Administering your Center in InfoNet

Settings ⚙

The Settings menu is primarily for Administrators. It can be accessed from the top toolbar throughout InfoNet. The tables in this component may only be accessible via a separate login because a center may want to limit access to only certain staff members. The Settings menu is used to enter the initial setup data in the system and to make periodic updates.

The Settings menu is broken down into the following categories:

1. *Center Information*—Used to enter information about your center, such as its location, contact information, Federal Identification Number, and legislative and judicial districts.
2. *Personnel Information*—Used to create, enter, and modify staff and volunteer records.
3. *Funding-For-Staff*—Used to link staff/volunteers with services and designate the funding source for service (critical for funding reports to work correctly).
4. *Agencies, Funding Sources, Other Staff Activities*—Used to manage their respectively named drop-down lists that appear on other screens throughout the system.

Center Information

When your center first starts using InfoNet, you should enter some general information on your center, such as county, legislative district, population, and service area, for your center. The Center Information will help link pertinent information about your center that may be relevant to your clients when data are later collated at the coalition or state level. Additional information may be added so centers can create a quick dynamic profile for funders and other users.

The following steps should be used to enter center information:



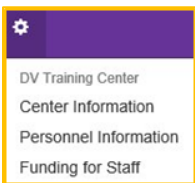
1. Select Settings (⚙) from the top toolbar.
2. Select **Center Information**.
3. Under the **Center Information** tab, enter center information in the open data fields.

While only the fields with red asterisks are mandatory, you should make every effort to complete all fields on this page.

Personnel Information

You can add or edit Personnel in the Personnel Information feature. Personnel may generically be called Staff. Each individual is given a *Staff Type*—Paid Staff or Volunteer—as well as a *Personnel Type*—Direct, Indirect, Board Member, or Other. Creating Personnel records for your Staff and Volunteers is vital. It will enable you to associate individuals with the services that your center provides, and ultimately to connect to *Staff–Services–Funding*. Staff members and volunteers will appear in drop-down menus only when their names are entered in the Staff Information form. The following steps should be used to enter staff member information into the database:

Adding New Personnel (Staff or Volunteer)



1. Select **Settings** icon.
2. Select **Personnel Information**

The default view for **Personnel Information** is the search screen, it will be detailed in the **Managing Personnel (Staff or Volunteer)** section. For now, scroll past the search fields to find the purple **➕Add New Personnel** button.

3. Click **➕Add New Personnel** on the right.
4. Complete all the date fields possible. Fields marked on the screen with a red asterisk * are required.
 1. *Paid Staff or Volunteer*—select the appropriate choice. This is also called *Staff Type*.
 2. *First Name*
 3. *Last Name*
 4. *Personnel Type*—Indicates whether staff/volunteer is direct or indirect service, a Board Member or Other
 5. *Supervisor*—Select the Staff member who supervises (only for volunteers)
 6. *Start Date*—Enter the first day this person worked or will work.

7. *Termination Date*—Unless back-entering data from the past, this will remain blank. Once entered this will be used to keep the Staff/Volunteer off drop down lists.
8. *Student*—Check yes if the person is currently a student.
9. *Title*
10. *Department*
11. *Work Phone*
12. *E-mail*
13. *Gender Identity*—Select one—Female, Male, Other
14. *Race/Ethnicity*—Select one—African American, Asian/Pacific Islander, Hispanic/Latino, Native American, White, Multiracial, Other, Unknown

Once required fields are entered, you will be allowed to save the data (press the green **Save** button) and the staff member will be able to be linked to Direct Client Services, as well as the Funding for Staff pages.

Note: If you wish to enter many people in one session, you can access the **Save and Add New** function by clicking on the arrow portion of the Save button.

Edit Existing Personnel

How to filter the Personnel List

When you first enter the Personnel Information page, you will see a wide range of search fields, with a list of all Personnel below. Enter search criteria in one or more of the search fields to filter this list.

The screenshot shows a web form titled "Personnel Information". It contains several search filters:

- Employment Date Range:** Two text input fields separated by a "to" label, and a "Ranges" dropdown menu.
- First Name:** A single text input field.
- Last Name:** A single text input field.
- Status:** A dropdown menu with "<Pick One>" and a downward arrow.
- Staff Type:** A dropdown menu with "<Pick One>" and a downward arrow.
- Personnel Type:** A dropdown menu with "<Pick One>" and a downward arrow.
- Race/Ethnicity:** A dropdown menu with "<Pick One>" and a downward arrow.
- Gender Identity:** A dropdown menu with "<Pick One>" and a downward arrow.
- Is Student?:** A dropdown menu with "<Pick One>" and a downward arrow.

 At the bottom left of the form are two buttons: a purple "Search" button with a magnifying glass icon, and a yellow "Reset" button with a circular arrow icon.

Notes on Search Fields:

- To appear on the list a staff person must meet all search criteria.


- Employment Date Range will filter for any person who was an active volunteer or employee for at least one day in this date range (including the start and the end dates).
- Ranges will provide quick access to date ranges such as this quarter, last year, this month for the employment dates.
- First and Last Name will accept partials, including those in the middle of the word. For example, entering “ran” for first name will display names such “Francesca” and “Brandon”. If you are consistent you may use this feature to include tags in names, such as including “SIU” after SIU students first names.
- Once you have entered all search criteria, click the purple Search button
- If you still cannot find the person you are looking for, it may be helpful to clear all search criteria with the yellow Reset button.

Editing existing Staff

After clicking search, you will see a list of results on the lower part of the screen where the full list of staff was previously located.

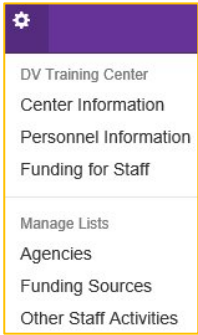
1. Find the individual’s name from the staff list at the bottom of the screen, using the filter detailed above if needed.
2. Click **Edit** in the row of the individual’s name.

Full Name	Staff Type	Personnel Type	Start Date	Termination Date	Student	
Amer (volunteer), Gaffar	Volunteer	Volunteer, Direct Service	05/01/2003	05/31/2014	<input type="checkbox"/>	Edit

3. Make the appropriate changes to the staff member’s personal information. (See the Section on Add New Personnel for details about Personnel demographics.)
4. Click **Save**. 

Manage Lists (Agencies, Funding Sources, Other Staff Activities)

Agencies, Funding Sources, and Other Staff Activities are dropdown lists used throughout InfoNet. They may be customized by each Center to reflect the specific agencies and funding sources your Center works with as well as specific activities your staff take part in. Because they are managed identically, they are presented once using the example of Agencies.



Select a list to Manage

1. Select Settings
2. Select Manage Lists > Agencies (or Funding Sources/Other Staff Activities)
3. After clicking on a list (in this example Agencies), you will be taken to the Manage List screen. This screen has two sections; an upper portion—**Add Agency** (or applicable list), and a lower portion—find and edit existing list entries (e.g. Agencies, Funding Sources, or Activities).
4. To add items to the list, type the name of the list item (i.e. Agency Name, Funding Source, or Activity), and select a display order (usually 0, see below for further directions). If desired, you may also enter in a list item and immediately mark it as inactive by unchecking the Active checkbox. This will hide the item from current lists and can be used to enter old data.

5. If you want to enter in additional list items, you can click Add New Agency and InfoNet will add additional rows.
6. When you are ready to add the items, Click **Save**. Note: This will also save any changes to existing list items entered on the bottom of the screen.

Using Display Order Effectively

By default, all list items, both on the management screens and in drop down menus, are displayed alphabetically. If your center chooses, you may assign display orders as well. Lower display orders will be shown first, with items sharing the same display order ordered alphabetically.

For example, if your Center receives most of its funding from a single Funding Source, then you might choose to enter that Funding Source with a Display Order of 0, and all other Funding Sources as Display order 1. This would make sure the most frequent Funding Source would always be the first choice.

Editing or Deleting Existing List Items

1. Locate the item listing at the bottom of the screen. Agencies/Funding Sources/Activities are listed with active items first, in display order, and then alphabetically. If desired, you may use the filters to enter part of the item's name, a display order, or filter for active/inactive.

2. Check the Edit box next to the list item to revise. (Or if you want to delete it altogether, check the Delete box. This will only be allowed if the list option has never been used however).

Action	Agency Name	Display Order	Active?
Edit <input type="checkbox"/> Delete <input type="checkbox"/>	A Safe Place	0	<input checked="" type="checkbox"/>

3. Make changes to Agency Name, Display Order, or mark the item as Active/Inactive.
4. You may make changes to multiple items
5. Click **Save**. This will update all items that have been added, edited, or deleted.

Funding-For-Staff Statements

Funding-for-Staff Statements facilitates the reporting of detailed grant information to funders, required by VOCA and VAWA grants. This feature allows you to specify what services each Staff member provides and designate which funding sources provide pay for those services. It even allows breaking down funding for services by percentage.

Along with the records of client services, this funding data will allow you to generate a detailed report that reflects services provided to clients by grant-funded staff. This grant-specific information can assist funders in assessing the impact of funds available in Illinois for victim services.

Appropriate staff or management, with knowledge of grant information and staff responsibilities, should maintain Funding-For-Staff Statements in InfoNet. At this time, agencies are only required to enter funding data for staff or volunteers who are supported with VOCA or VAWA grants that are administered by the Illinois Criminal Justice Information Authority. These grants include those that are subcontracted to agencies through the Illinois Coalition Against Domestic Violence and Illinois Coalition Against Sexual Assault.

Understanding funding information in InfoNet

InfoNet organizes how services are funded using **Funding-For-Staff Statements**, with each Funding Statement comprised of:

1. The date funding starts, *Funding Effective Date*
2. A *Staff List* of all Staff/Volunteers who provide funded services
3. A list of *Services* for everyone assigned to *Staff List*
4. A list of *Funding Sources* and funding percentage for each Service by each Staff.

Note that there is no screen called “Funding Statement.” However, the term is often used by InfoNet users (and this manual) to refer to the complete set of date entered into InfoNet for a specific *Funding Effective Date*.

How to Set Up Funding in InfoNet

To track the usage of Funding properly in InfoNet you must do the following:

1. **Personnel Information:** Create records for all Staff/Volunteers
2. **Manage Lists—Funding Sources:** Add list items for each funding source you wish to track
3. **Funding for Staff Statements**
 - a. Create at least one *Funding Effective Date*
 - b. **Edit Staff List:** Add all funded Staff/Volunteers to the *Staff List* for that date.
 - c. **Assign Services** for each Staff/Volunteer
 - i. Optional: Use **Match Services For...** within **Assign Services** to copy Services and Funding from existing Staff
 - d. Designate **Funding Source** and funding percentage for each Service
 - i. Optional: Use **Multi-Fund Assignment** to assign the same Funding Source and funding percentage for multiple services by the selected Staff/Volunteer.

Funding is generally added to InfoNet at the beginning of a state fiscal year, which corresponds with most funding cycles. However, as funding is organized by staff, data will need to be updated periodically to reflect new staff, staff turnover, or a change in staff responsibilities.

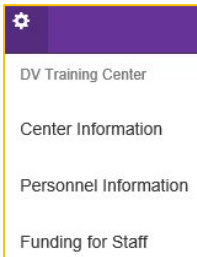
When you create a new *Funding Effective Date*, InfoNet first copies the entire previous funding settings. Then you can make changes by adding/removing *Staff* from the list, adding/removing *Services* from each Staff, or changing which *Funding Sources* support each *Service*. Because changes started from a new copy, a complete history of funding is kept.

Note that in InfoNet, *Services* are funded in the context of specific *Staff*. There is no way to set all Hotline services to be funded by a local donor, regardless of the Staff/Volunteer. There is however a function (Match Services) to copy Services/Funding from one Staff/Volunteer to another, so if you add a new person who provides the same or similar services, you can save time.

Funding is entered in Funding-for-Staff Statements and is queried when a specific grant report is generated. See the Reports section for more details on reporting.

Where to Find Funding-for-Staff Statements

The following steps should be used to enter funding-for-staff statements information into InfoNet:



1. Select **⚙ (Settings)** from the menu bar.
2. Select **Funding for Staff Statements**

Start working with funding by selecting a Funding Effective Date

To specify funding, you must first select a *Funding Effective Date*. When you first enter the Funding-for-Staff Statements screen you will see the most recent *Funding Effective Date* in the upper left corner.

A screenshot of a web form element labeled 'Date Issued'. It contains a text input field with the date '2/1/2019' and a dropdown arrow. To the right of the input field are two buttons: a purple button with a plus icon and the text 'Add', and a red button with the text 'Delete'.

You will also see the first staff person (in alphabetical order) who has funding designated on that date, and a summary of their services. To review current funding, you may select a different Staff member or volunteer from the Staff drop down.

A screenshot of a web form element labeled 'Staff'. It contains a dropdown menu with the text 'Barker, Bob (S)' and a dropdown arrow. To the right of the dropdown menu is a purple button with a pencil icon and the text 'Edit Staff List'.

Changes to existing funding can be made two ways—

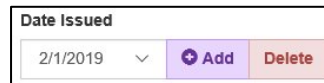
1. To update InfoNet with changes to funding, create a new *Funding Effective Date*, then modify Staff funding.
2. To correct data issues with past or present funding, select the relevant *Funding Effective Date*, then modify Staff funding.

Selecting an existing *Funding Effective Date* to correct funding records

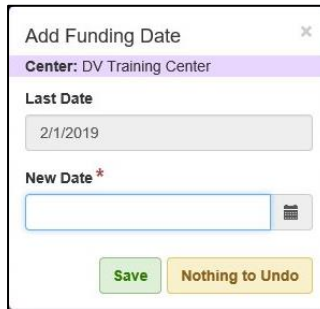
If the date has already been created, then select it from the drop-down menu under *Funding Effective Date*. You should only change data for an existing *Funding Effective Date* if you have entered information inaccurately or incompletely and need to correct it. If the data was accurate, but the funding has in fact changed, first add a new *Funding Effective Date* (all staff and funding will be copied over) and then make changes for that new record.

Creating a new Funding Effective Date to create a new set of funding

To enter a new *Funding Effective Date*, click **+Add**. As mentioned above this will create a copy of the prior funding that you can use as a starting point.

A dropdown menu titled "Date Issued" showing "2/1/2019" with a downward arrow. To the right are two buttons: a purple "+ Add" button and a red "Delete" button.

When the Add Funding Date window opens, enter the **New Date** that the funding will first be effective and click **Save**. The new *Funding Effective Date* will now appear drop-down menu.

A window titled "Add Funding Date" with a close button (X) in the top right. It shows "Center: DV Training Center". Below is a "Last Date" field with "2/1/2019". Then a "New Date*" field with a calendar icon. At the bottom are "Save" and "Nothing to Undo" buttons.

Selecting Staff using the Edit Staff List

As mentioned above, InfoNet organizes funding by Funding Effective Date, Staff, Service, and Funding Agency. The Staff list is the list of Staff who have funding designated in InfoNet for a funding statement. Editing the staff list allows you to add or remove Staff from a funding Statement.

The following steps should be used to edit the staff list:

1. Click the **Edit Staff List** button to select all of the staff and volunteers that need to be included in the funding statement.

A dropdown menu titled "Staff" showing "Barker, Bob (S)" with a downward arrow. To the right is a purple button with a pencil icon and the text "Edit Staff List".

2. The Edit Staff List window will open with a list of all staff and volunteers in InfoNet. Staff are highlighted in yellow and designated with an (S), while volunteers are highlighted in blue and designated with a (V).

Even though volunteers are not paid with grant funds, they may be “supported” by a grant. For example, VOCA Medical Advocacy funds may pay for a volunteer coordinator. In this instance, funding should be entered for the volunteers supervised by the coordinator so that the services they provide and the clients that they serve are reflected in a VOCA Medical Advocacy report.

- To designate which staff and volunteers have funding to track in InfoNet, use the check boxes on the left side of each name to assign Staff/Volunteers to the Funding for Staff Statement.

Edit Staff List - Available Staff

Center: DV Training Center

* Indicates entry which can not be removed.

Assigned/Available Staff

11 selected

Search

<input checked="" type="checkbox"/> *Barker, Bob (S)	<input type="checkbox"/> Ibarra, Jacquelynn (S)
<input checked="" type="checkbox"/> *Bell, Loretta (S)	<input type="checkbox"/> IsdaCoolest, Cassie (S)
<input checked="" type="checkbox"/> *Dean, Julia (S)	<input type="checkbox"/> Iseminger, Stuart (S)
<input checked="" type="checkbox"/> *Duck, Daffy (S)	<input type="checkbox"/> Jackson, Lolita (S)
<input checked="" type="checkbox"/> *Sarwat, Rumi (S)	<input type="checkbox"/> Jacobjingleheimerschmidt, John (S)
<input checked="" type="checkbox"/> *Shortcake, Strawberry (S)	<input type="checkbox"/> Jallaq, Hanadie (S)
<input checked="" type="checkbox"/> *Sidlinger, Kim (S)	<input type="checkbox"/> james, etta (S)
<input checked="" type="checkbox"/> *Smith, Sandy (S)	<input type="checkbox"/> Janson, Jeff (S)
<input checked="" type="checkbox"/> *Summer, June (S)	<input type="checkbox"/> Jenkins, Darci (S)
<input checked="" type="checkbox"/> *Turri, Elaine (V)	<input type="checkbox"/> Jenks, Jennifer (S)
<input checked="" type="checkbox"/> *Volunteers, Court Advocacy (V)	<input type="checkbox"/> Joe, Mary (S)
<input type="checkbox"/> Bayne, Kathy (S)	<input type="checkbox"/> Johnson, Jennifer (S)
<input type="checkbox"/> Betan, Melanie (S)	<input type="checkbox"/> Jolly, Lolly (S)

Assign Services to Staff & Volunteers

The following steps should be used to assign services to staff members and volunteers:

- You must enter the services provided by each person included in the Staff list. To do this, click the Assign Services button.

Services/Programs
Assign Services
Multi-Fund Assignment

Name - (Results: 3)	Percent
Civil Legal Advocacy/OP (S)	0
Collaborative Case Management (S)	0
Conflict Resolution (S)	0

2. A list of all available services in InfoNet will appear in the **Programs/Service Selection** window.

Direct Client Services are highlighted in yellow and designated with an (S); Community, Institutional, & Group Services are highlighted in blue and designated with a (P); and Hotline Service is highlighted in red and designated with an (H).

3. To create a list of services provided by the selected staff or volunteer, use the check boxes to move services/programs from the Available list to the Assigned list.
4. Click Save when the list of services for the staff member or volunteer is complete.

Multi-Fund Assignment

You need to indicate the funding source that supports the provision of each service provided by the staff member or volunteer. There are two ways to enter this funding information: Multi-Fund Assignment or Assign Funding Source. **Multi-Fund Assignment** should be used when the funding information (source and percent) for more than one service is the same. Use **Assign Funding Source** when the funding information (source and percent) for each service varies. In most cases, you will use Multi-Fund Assignment. The following steps should be used to enter a Multi-Fund Assignment:

1. Use the **Staff** drop down tab to find the person's name for whom you want to enter funding information.

- To enter funding information that is the same for several services for the same Staff, click on the **Multi-Fund Assignment** button.

Funding For Staff

Date Issued: 2/1/2019 Add Delete Staff: Barker, Bob (S) Edit Staff List Reports Help

Services/Programs Assign Services Multi-Fund Assignment

Name - (Results: 3)	Percent
Civil Legal Advocacy/OP (S)	0
Collaborative Case Management (S)	0
Conflict Resolution (S)	0

- Within the Multi-Fund Assignment window, a list of all of the services you previously selected for the staff member or volunteer will be listed to the left, while a list of possible funding sources will be listed to the right. Check the **services** you want to link to a funding source(s).

Multi-Fund Assignment

Center: DV Training Center Staff Member: Barker, Bob (S)

Instructions

- Check the services you want to link to a funding source(s).
- Select the funding source(s) that will support the selected services. Percentages for all funding sources must sum to 100%.
- Click the Save button to apply changes or the undo/cancel button to exit without changing.

*Indicates funding source is no longer active.

Services	%
<input type="checkbox"/> Civil Legal Advocacy/OP (S)	0
<input type="checkbox"/> Collaborative Case Management (S)	0
<input type="checkbox"/> Conflict Resolution (S)	0
Total Services Selected: 0	

Funds	%
<input type="checkbox"/> ABC125IGrant	0
<input type="checkbox"/> ABC126 Grant	0
<input type="checkbox"/> ABC128	0
<input type="checkbox"/> Agreement #201103	0
<input type="checkbox"/> Alphawood Foundation	0
<input type="checkbox"/> Attorney General	0
<input type="checkbox"/> Attorney General VCVA	0
<input type="checkbox"/> Casey Foundation	0
<input type="checkbox"/> CCR Grant	0
<input type="checkbox"/> CCSS Training Grant	0
<input type="checkbox"/> Champaign County Board	0
<input type="checkbox"/> Cherry Blossom	0
<input type="checkbox"/> Chicago DFSS	0
<input type="checkbox"/> Chicago Foundation for Women	0
Total %: 0	

Save Nothing to Undo

- Select the funding source of those services by clicking the checkbox to the left of the respective funding source. After selecting a funding source, **100%** will automatically appear in the % column. If the services are supported by multiple funding sources, change 100% to the correct percent, select the other funding source(s), and enter the

percent of funding for the other funding source. The total percent of the services must equal 100%.

5. Click **Save**.
6. If funding information was not entered for all of the services provided by this staff or volunteer, select **Multi-Funding Assignment**. Within the Multi-Service Funding Selection window, 100% will appear in the column directly to the right of each service already linked with funding information. Select the service that does not have funding information entered (indicated by 0%) and repeat steps 3 and 4.

Assign Funding Source

The following steps should be used to assign a funding source:

1. First select the Staff person you wish to assign services and funding for.
2. To enter funding information for one service at a time, click the purple triangle to the right of the service that you want to enter funding information for, and select **Funding Source**

The screenshot shows a software interface for assigning funding sources. At the top, there are two tabs: 'Assign Services' and 'Multi-Fund Assignment'. The 'Multi-Fund Assignment' tab is active. Below the tabs, there is a table with two columns: 'Name - (Results: 33)' and 'Percent'. The first row in the table is 'Adult Group Counseling (S)' with a value of '100' in the 'Percent' column. To the right of the '100' is a purple triangle icon. Below this row, there is a sub-table titled 'Funding Source - (Results: 2)' with two columns: 'Funding Source' and 'Percent'. The first row in this sub-table is 'DHS-Domestic Violence' with a value of '50' in the 'Percent' column. The second row is 'VOCA DV Services' with a value of '50' in the 'Percent' column. At the bottom right of the sub-table, there is a button labeled 'Funding Source' with a pencil icon.

Name - (Results: 33)	Percent
Adult Group Counseling (S)	100

Funding Source - (Results: 2)	Percent
DHS-Domestic Violence	50
VOCA DV Services	50

3. Within the Funding Selection window, select the funding source of the respective service by clicking the checkbox to the left of the appropriate funding source. After selecting a funding source, **100%** will automatically appear in the % column.

If the services are supported by multiple funding sources, change 100% to the correct percent, select the other funding source(s), and enter the percent of funding for the other funding source. The total percent of the services must equal 100%.

Funding Selection

Center: DV Training Center Staff Member: Barker, Bob (S)

Service: Civil Legal Advocacy/OP (S)

Instructions

1. Select the funding sources that will support the selected service and the percentage each source will support this service. Percentages for all funds must sum to 100%.
2. Click the Save button to apply changes or the Undo/Cancel Button to exit without changing.

Funds	%
<input type="checkbox"/> ABC125Grant	0
<input type="checkbox"/> ABC126 Grant	0
<input type="checkbox"/> ABC128	0
<input type="checkbox"/> Agreement #201103	0
<input type="checkbox"/> Alphawood Foundation	0
<input type="checkbox"/> Attorney General	0
<input type="checkbox"/> Attorney General VCVA	0
<input type="checkbox"/> Casey Foundation	0
<input type="checkbox"/> CCR Grant	0
<input type="checkbox"/> CCSS Training Grant	0
<input type="checkbox"/> Champaign County Board	0
<input type="checkbox"/> Cherry Blossom	0
<input type="checkbox"/> Chicago DFSS	0

Total %: 0

Save Nothing to Undo

4. Click **Save**.
5. Continue to enter one or more funding source(s) for each service provided by this staff member or volunteer by repeating the previous steps for each service. The funding statement for this Staff/Volunteer is complete when each respective service is listed with 100% funding in the Services/Programs table.

Assigning the correct funding percentage

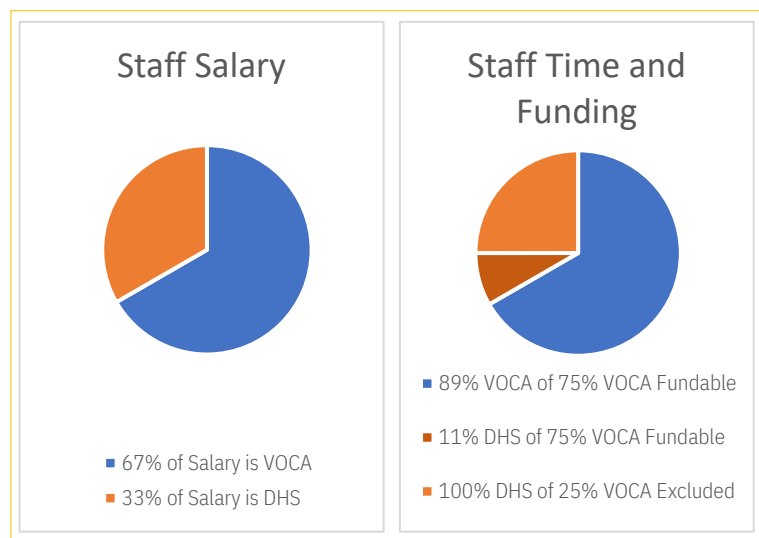
Often funding is straightforward, for example a counselor may have their salary funded completely by VOCA, in which case any VOCA funded services would be assigned 100% to VOCA. Often however, an individual staff member may have their *salary* funded 50% by VOCA and 50% by DHS. In these situations, it is necessary to remember that what is being assigned is not the percent of salary, rather the percent of services.

A general rule for setting the correct percent for services is the following formula:

$$\frac{\% \text{ of staff salary funded by grant}}{\% \text{ of staff time providing services}}$$

If an individual receives half their salary from VOCA and spends half their *overall* time at work providing direct services, however all of the time they spend providing direct services VOCA funded, then the correct percentage is 100% (the amount of direct service covered by VOCA), not 50% (the percent of their salary covered by VOCA).

As another example, suppose a different staff person has two thirds (66.7%) of their salary covered by VOCA and one third (33.3%) covered by DHS, and they spend all their time on fundable services, however only 75% of those services are fundable by VOCA. The formula would then be: 66.7% of Salary paid by VOCA ÷ 75% of Staff Service Time on VOCA fundable Services = 89% VOCA funding for VOCA fundable services. This leaves 11% to be paid by DHS for VOCA fundable services. To complete this, we assign 100% of their remaining services (that cannot be paid by VOCA) to DHS, because they cannot be paid by VOCA.



We can check the math for the second example like this:

11% DHS funding × 75% of service time fundable by VOCA = 8.3% DHS
 100% DHS × 25% of service time not fundable by VOCA = 25% DHS
 25% DHS + 8.3% DHS = 33.3% of total staff time funded by DHS

It may take a bit of practice to work through these various unique situations. ICJIA offers additional trainings on Funding for Staff. Please contact CJA.InfonetHelp@illinois.gov for individualized help or to join a training.

Multiple Staff with Same Funding Information

If two or more staff members and/or volunteers provide the same services and have the same funding information, it is not necessary to re-enter the

information for each person. The following steps should be used to link multiple staff members/volunteers with the same funding source:

1. Select the Staff member/volunteer who does not yet have services/funding assigned to them.
2. Click the **Assign Services** button.

Staff (Results: 11)

Barker, Bob (S) [v] [Edit Staff List] [Reports] [Help]

[Assign Services] [Multi-Fund Assignment]

3. Locate the **Match Services For** drop-down menu at the top of the Program/Service Selection window. Click the drop-down menu to view a list of all staff members and volunteers who already have funding information entered. Select the staff member or volunteer who has the same service and funding information.

Program/Service Selection

Center: DV Training Center Staff Member: Barker, Bob (S)

Match Services For

[Blue Drop-down Menu]

4. Click **Save**.
5. You will see the same services and funding assigned to both staff members. Repeat this step for each staff member and/or volunteer who has funding information that matches a person with an existing statement.

Entering Subsequent Funding Statements

The following steps should be used to enter subsequent funding statements:

1. Click **+** Add next to the *Funding Effective Date* drop-down menu.

Date Issued

2/1/2019 [v] [Add] [Delete]

2. When the Add Funding Date window opens, enter the *New Date* that the funding statement will be effective and click Save. The funding

Add Funding Date

Center: DV Training Center

Last Date

2/1/2019

New Date *

[Calendar Icon]

[Save] [Nothing to Undo]

statement you entered will appear in the *Funding Effective Date* drop-down menu.

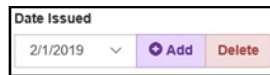
3. The staff list from the previous funding statement will appear on the screen. Most of the time, staff member/volunteer information remains the same each year. InfoNet automatically copies this to the subsequent funding statement to eliminate the need to reenter this data. If a staff member or volunteer is no longer associated to a particular service or leaves your program entirely, use the Edit Staff List function to maintain this information.

Deleting Funding Records

In extreme cases (e.g. planned funding changes dramatically, or major data entry errors), it may be necessary to delete an entire *Funding Effective Date* and all associated funding. This will revert funding to whichever the prior *Funding Effective Date* was. For example, if you had entered new funding for the new state fiscal year (July 1), however funding changed dramatically, you could delete that *Funding Effective Date*. This would revert funding to the previous *Funding Effective Date* (perhaps June 1st when a new staff member started). You could then re-enter the July 1st Funding Effective Date with new funding.

The following steps should be used to delete existing funding:

1. Select the appropriate *Funding Effective Date* drop-down menu.



A screenshot of a web interface element labeled 'Date Issued'. It features a dropdown menu currently showing '2/1/2019'. To the right of the dropdown are two buttons: a purple 'Add' button with a plus icon and a red 'Delete' button.

2. Click the Delete button to the right of the funding statement date.
3. Click Yes in the confirmation window.



A screenshot of a confirmation dialog box. The title bar says 'Are you sure you want to do that?' with a close button (X). The main text reads: 'You have marked the following: ■ **Date Issued: 1/27/2012**'. Below this, it says 'If you continue, the record will be **permanently deleted**.' At the bottom right are two buttons: a red 'Yes' button and a grey 'No' button.

Funding for Staff Reports

Once you have finished entering a funding statement into InfoNet, you should use the available reports to review and verify that the information is correct.

The screenshot shows the 'Staff' dropdown menu with 'Barker, Bob (S)' selected. The 'Reports' dropdown menu is open, showing options: 'Selected Funding', 'Staff Selected Funding', 'Funding History', and 'Staff Funding History'.

Four reports are available so that you can review partial or total funding information. The following are descriptions of each report:

1. **Selected Funding:** This report includes all funding information for a single funding statement. To generate the report, select a funding statement from the Issue Date drop-down menu and then click Selected Funding. The report will list each staff member or volunteer included in the funding statement, the services selected for each staff member or volunteer, and the corresponding funding information – funding source and percent of funding – for each service provided by the staff member(s) or volunteer(s).

Selected Funding		
DV Training Center - Selected Funding - All Staff		
Funding Date		
Staff Member	Program/Service	Funding
Funding Date: 2/1/2019		
Barker, Bob	Civil Legal Advocacy/OP (S)	0%
	Collaborative Case Management (S)	0%
	Conflict Resolution (S)	0%
Bell, Loretta	Adult Group Counseling (S)	100%
	DHS-Domestic Violence	50%
	VOCA DV Services	50%
	Art Therapy (S)	100%
	DHS-Domestic Violence	25%

2. **Staff Selected Funding:** This report includes funding information for an individual staff member or volunteer during a specified funding

Staff Selected Funding		
DV Training Center - Staff Selected Funding - Loretta Bell		
Funding Date		
Program/Service	Funding Source	Funding
Funding Date: 2/1/2019		
Adult Group Counseling (S)		100%
	DHS-Domestic Violence	50%
	VOCA DV Services	50%
Art Therapy (S)		100%
	DHS-Domestic Violence	25%
	VAWA Rural	25%

period. To generate the report, select a funding statement from the Issue Date drop-down menu, click on the gray box to the left of the respective staff member or volunteer, and select Staff Selected Funding. The report will include the service and funding information for the selected staff member or volunteer.

3. **Funding History:** This report includes information about every funding statement in InfoNet, including the names of the staff members or volunteers, the services provided by them, and the corresponding funding information – funding source and percent of funding.

To generate this report, select Funding History, and then from the next screen select one or more Funding Effective Dates.

Funding History Selection

Center: DV Training Center Staff Member: ALL

* Indicates previously selected statement.

Available Statements

0 selected

Search

<input type="checkbox"/> 2/1/2019	<input type="checkbox"/> 6/1/2010	<input type="checkbox"/> 11/8/2006
<input type="checkbox"/> 1/31/2019	<input type="checkbox"/> 5/1/2010	<input type="checkbox"/> 11/1/2006
<input type="checkbox"/> 1/7/2019	<input type="checkbox"/> 4/1/2010	<input type="checkbox"/> 10/31/2006
<input type="checkbox"/> 7/1/2018	<input type="checkbox"/> 12/30/2009	<input type="checkbox"/> 5/8/2006
<input type="checkbox"/> 7/1/2017	<input type="checkbox"/> 12/28/2009	<input type="checkbox"/> 3/1/2006
<input type="checkbox"/> 2/3/2017	<input type="checkbox"/> 12/16/2009	<input type="checkbox"/> 12/1/2005

The information in this report will be grouped by funding statement and sorted chronologically.

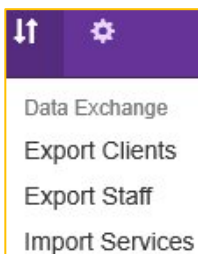
Funding History		
DV Training Center - Funding History - All Staff		
Funding Date		
Staff Member	Program/Service	Funding
	Funding Source	
Funding Date: 1/7/2019		
Barker, Bob		
	Civil Legal Advocacy/OP (\$)	0%
	Collaborative Case Management (\$)	0%
	Conflict Resolution (\$)	0%
Bell, Loretta		
	Adult Group Counseling (\$)	100%
	DHS-Domestic Violence	50%
	VOCA DV Services	50%
	Art Therapy (\$)	100%
	DHS-Domestic Violence	25%
	VAWA Rural	25%
	VOCA DV Services	50%
	Child Care (\$)	100%
	DHS-Domestic Violence	25%
	VAWA Rural	25%
	VOCA DV Services	50%

4. **Staff Funding History:** This report includes all funding information for a particular staff member or volunteer. To generate this report, select any Staff from the main Funding for Staff Statements screen, then select the Staff Funding History report from the Reports dropdown. Next, click on the gray box to the left of the dates you want included in the report.

Funding History Selection		
Center: DV Training Center		Staff Member: Bell, Loretta (S)
* Indicates previously selected statement.		
Available Statements		
2 selected		
Search		
<input checked="" type="checkbox"/> 2/1/2019	<input type="checkbox"/> 7/1/2018	<input type="checkbox"/> 8/1/2016
<input checked="" type="checkbox"/> 1/31/2019	<input type="checkbox"/> 7/1/2017	<input type="checkbox"/> 8/14/2014
<input type="checkbox"/> 1/7/2019	<input type="checkbox"/> 2/3/2017	

This information will be reported chronologically by the Effective Funding Date.

Staff Funding History		
DV Training Center - Staff Funding History - Loretta Bell		
Funding Date	Program/Service	Funding
	Funding Source	
Funding Date: 1/7/2019		
	Adult Group Counseling (S)	100%
	DHS-Domestic Violence	50%
	VOCA DV Services	50%
	Art Therapy (S)	100%
	DHS-Domestic Violence	25%
	VAWA Rural	25%



Data Exchange ↑↓

The Data Exchange feature of InfoNet allows administrators to import and export certain data from other systems. This can be extremely helpful if you use another electronic case management system or attendance tracking system and want to avoid duplicate data entry.

The anticipated workflow is that Client and Staff records be exported either to the external system or for offline data processing, and that service data from an external system be imported into InfoNet.

Export Clients and Export Staff both allow you to export applicable lists of Clients and Staff that are sufficient to match with records in another database. (Remember to be exceedingly cautious with these files.)

Import Services imports a specifically structured Microsoft Access 2000 database file (.mdb) into InfoNet. While this manual gives specific details, we strongly advise contacting CJA.InfonetHelp@illinois.gov to request a blank template file that adheres to the format.

Export Clients

After selecting Export Xlients, you will immediately see a new screen containing the default search results of all clients with a first contact date range within the past three months. This is slightly different from other screens, as they mostly default to show any clients with service in the past three months. This is intentional as Export Clients is meant to enable you to upload services, so it is necessary to include clients with no service.

Export Clients

Client Code

First Contact Date Range

Ranges

12/04/2018 to 03/04/2019

Last 3 Months

Search

Reset

Download

Client ID	Client Code	Gender	Ethnicity	Race/Ethnicity	First Contact Date
1066942	999	Female	Unknown	White	02/08/2019
1068748	velochid	Female	Non Hispanic/Latino	Black/African American, Native Hawaiian or Other Pacific Islander	02/25/2019
1066734	velonews	Transgender female (male to female)	Hispanic/Latino	Black/African American, Hispanic/Latino	02/04/2019

1

10

Displaying 1 to 3 of 3 Records

You may select a different search range if you wish. Most often you will save the list as a .csv file once you have the date range selected by pressing Download. This will save all the records at once.

Export Staff

Exporting staff is almost identical in function to exporting clients, except that it focuses on staff records and the filters are separate. For staff the most relevant details will often be whether or not they are currently active, and whether or not they are volunteers. When you enter the export staff screen, those will be the filter options, along with Personnel Type (e.g. Direct Service Volunteer or Management).

Export Staff

Status

Staff Type

Personnel Type

<Pick One>

<Pick One>

<Pick One>

Search

Reset

Download

Staff ID	Last Name	First Name	Staff Type	Personnel Type	Start Date	Termination Date
9733	Amer (volunteer)	Gaffar	Volunteer	Volunteer, Direct Service	05/01/2003	05/31/2014
120	Anderson Volunteer	Adam	Volunteer			01/01/2002
33222	Barker	Bob	Staff		07/01/2018	

Just as with clients, once you have filtered the list as desired, you may save the present results as a .csv file by pressing Download.

Import Services

Most InfoNet users will not use Import Services, if your agency has multiple systems, however, it may become a crucial part of your InfoNet use. Because the process is technical, it can often be largely automated. This section will

first summarize the overall workflow and then provide a detailed guide to how to complete the steps.

The overall workflow for Importing Services into InfoNet can be summarized as such:

1. Export Clients and Staff from InfoNet (to obtain InfoNet system identifiers). Also reference the service list documentation included in this document to code service (e.g. Adult Counseling).
2. Export Services from an external system/gather service data into electronic format such as excel or access. If there is an external system, you will want to include identifiers from that system in your files. If you are uploading from paper records, then you will want to assign a unique number to each service and store those records securely.
3. Transform data from 1 and 2 into the Microsoft Access 2000 database file according to format detailed below.
4. Use InfoNet's Data Exchange Services Import function to load the file into InfoNet.
5. Read log files and/or exception reports to identify any errors.
6. Correct any errors in the Access file and load another time.

While this process may take a while to work through the first time, you will likely find ways to streamline and/or automate most steps as you repeat the process. Unfortunately, ICJIA cannot provide support for external systems, however, we will assist your organization in determining the correct procedures to convert and upload your data in a streamlined manner, within reasonable limitations.

InfoNet's Services Import Format

Whether the other system is a second electronic records system or a paper file, the goal is to reformat the data so that InfoNet can correctly match with existing records. To do that, it is easiest to understand that format first. This is relatively straightforward, but detail oriented work.


InfoNet's import services feature can currently only read Microsoft Access 2000's .mdb file format. All versions of Microsoft Access 2000 and later can read/write to this format. If you do not have Access, you can also install free/open source software such as LibreOffice to create this file.

The Access file must be named "ServiceDetail_X.mdb", where in place of X must be replaced with the InfoNet CenterID for your center. For example, the InfoNet domestic violence training center has a CenterID of 2, so every file uploaded must be named "ServiceDetail_2.mdb". Contact InfoNet help to obtain your CenterID if you do not already have a record of it.


Within the Access file there should be three tables (tables are essentially spreadsheets), review below. It is important that beyond containing data in the correct format, the columns also be formatting to the correct data type (e.g. using Design View in Access). Also note that while the file should contain these three tables, if you are only uploading direct and shelter services, you will only need to put data in the first one, T_ServiceDetailOfClient.

1. T_ServiceDetailOfClient—Captures the data collected by the Direct Services and Housing Services panels on individual client service records,

Direct Services				
Add Service Detail				
Service *	Staff/Volunteer *	Date *	Hours *	
<Pick One> ▼	<Pick One> ▼			

Housing Services			
Add Housing Service			
Service *	Shelter/Tran. Housing Begin *	Shelter/Tran. Housing End	
<Pick One> ▼			

as well as Attendee Details from Group Services.

Attendees Details			
Client ID	Case ID	Received Hours	
	▼		

1.1. Columns in Order with Data Type and Description

- 1.1.1. ClientID—Number/Long Integer, must exactly match the ClientID from InfoNet obtained from Client Export, not the ClientID visible using InfoNet's web interface.
- 1.1.2. CaseID—Number/Long Integer, which case of the Client specified by the ClientID will the activity be recorded for (generally the open case of the Client, e.g. 1, 2, or 3)
- 1.1.3. ServiceID—Number/Long Integer, this indicates the specific service delivered. The number must be a valid ServiceID for the intended service as listed in the Services List appendix, for example, Family Counseling would be 54.

For group services this should match the group service record/matched row on T_ProgramDetail, if not it will be overwritten with the group value. It cannot be empty.
- 1.1.4. SVID—Number/Long Integer, this indicates Staff/Volunteer who conducted direct services and is not used for housing

services. This number must be the correct and exact match for the intended staff member or volunteer from the StaffID column as exported from Export Staff

- 1.1.5. ServiceDate—Date/Time, for direct services, the date of service. Leave blank for Housing Services.

For group services this should match the group service record/matched row on T_ProgramDetail, if not it will be overwritten with the group value. It cannot be empty.

- 1.1.6. LocationID—Number/Long Integer, this will be your CenterID, the same as was appended to the filename.

- 1.1.7. ReceivedHours—Number/Double, only for direct and group services, this is the number of hours the client received as a decimal, rounding to .25, e.g. 1 hour and 8 minutes would be rounded up to a 1 hour and 15 minutes and then entered as 1.25 not 1:15. (Round in accordance to any applicable funding or organization rules.)

- 1.1.8. ShelterBegDate—Date/Time, only for shelter services, the date the client entered shelter service.

- 1.1.9. ShelterEndDate—Date/Time, only for shelter services, the date the client departed shelter service. If empty, this indicates the client is still in shelter service for respective start date. Care must be ensured to only have on record with an empty end date and never upload shelter services with overlapping dates.

- 1.1.10. AgencyRecID—Number/Long Integer, this is a unique record identifier defined by your agency. If you upload two records with the same identifier, then InfoNet will treat the second upload as an update or correction to the first record.

If you are importing data from another electronic case management system, then this should ideally be row number/primary key for the respective service/row in your system.

This number will be used to determine if the record being uploaded is new or an update to previously uploaded service record. Even if your organization only uploads new services, it is critical for you to track the numbers you are uploading.

- 1.1.11. Agency_ics_id—Number/Long Integer, blank for individual and housing services. This is the unique record identifier of a *specific group service*. It is used to connect the individual service/attendance records with an associated group service record (a row of T_ProgramDetail) as well as any/all records of staff time for that services (one or more rows of

T_ProgramDetail_Staff). Like the AgencyRecID it should be unique for each group service, as uploading the same number will be interpreted as updates/additions to existing group service records.

2. T_ProgramDetail—Captures the shared data from a group service. Note that this table will be empty if you are not uploading any group services.

2.1. Columns in Order with Data Type and Description

- 2.1.1. Agency_ics_id—Number/Long Integer, (Autonumber), this is the unique record identifier of a group service, as defined by your agency. It ties the various staff and client time entries recorded on T_ServiceDetailOfClient and T_ProgramDetail_Staff together into the same Group Service as viewed inside of InfoNet. If the same Agency_ics_id is uploaded more than once it will be processed as an update to the existing record.

Note: If you receive an empty template file, this will be set to Autonumber. This will automatically create a unique id, and then you only need to match the other two tables to this number. Depending on your workflow this may be helpful.

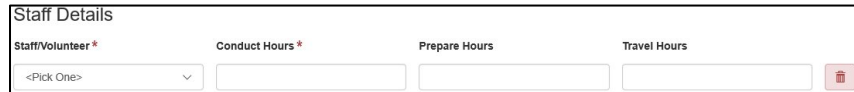
- 2.1.2. ProgramID—Number/Long Integer, this identifies which service or program was delivered/conducted and must match the respective category from the Service Codes appendix. For example, 42 indicates Adult Group Counseling. Note: any client service records (T_ServiceDetailOfClient) with the same Agency_ics_id will have their serviceID overwritten with this value.

- 2.1.3. NumOfSessions—Number/Long Integer, this will usually be one unless your organization tracks multiple sessions at once for group services. If you do track multiple sessions at once, indicate the number of sessions recorded in this record.

- 2.1.4. PDate—Date/Time, the date of the group service. Either when the group service session occurred, or the first or last session if recording multiple sessions in a single record. Note: any client service records (T_ServiceDetailOfClient) with the same

Agency_ics_id will have their ServiceDate overwritten with this value.

- 2.1.5. ParticipantsNum—Number/Long Integer, the total number of participants who attended the group service. Note that while this should generally match the number of rows of attendance uploaded on T_ServiceDetailOfClient, it could be greater if some attendees are not clients or otherwise wish to remain anonymous.
 - 2.1.6. Hours—Number/Double, the total hours (for all sessions if applicable) of service delivered to clients. For example, for a single two (2) hour class, this would be two (2) hours, but for four (4) sessions of two (2) hour classes it would be eight (8). Partial hours should be rounded to the quarter hour and recorded as decimal, e.g. 1.25 hours, not 1:15.
3. T_ProgramDetail_Staff—This records staff time spent on group sessions, matching the Staff Details section when entering Group Services inside InfoNet.



3.1. Columns in Order with Data Type and Description

- 3.1.1. Agency_ics_id—Number/Long Integer, this must match a new or existing record of the group service (i.e. must match a value of Agency_ics_id in the T_ProgramDetail table.) This indicates which group services the time was associated with.
- 3.1.2. SVID—Number/Long Integer, this is the Staff or Volunteer's ID, and must match the Staff ID column from Export Staff.
- 3.1.3. HoursofConduct—Number/Double, the amount of time in hours (for all sessions if more than one session) that the staff member actively provided service/conducted services. This should be rounded to 15-minute increments and entered as a decimal, e.g. 2.75 not 2:45 for 2 hour and 45 minutes.
- 3.1.4. HoursPrepare—Number/Double, the amount of time in hours (for all sessions if more than one session) that the staff spent preparing for the group service. Likewise, a decimal rounded to the quarter hour.
- 3.1.5. HoursTravel—Number/Double, the amount of time, in hours (for all sessions if more than one session), that the staff spent travelling to reach a group service site. Likewise, a decimal rounded to the quarter hour.

An example of how to transform data

To illustrate the process, let's work through an example.

For the sake of simplicity, while still walking through all the steps, we'll focus on a single group session. Suppose you have either a paper or electronic system that collects data shown below:

Facilitator 1:	Juhi	Time:	1h,2 prep, .25 travel
Facilitator 2:	Tonya	Time:	2h,.5 prep, .75 travel
Topic:	Understanding Trauma	Start/End Time	Jan 31,2019 4:05pm/6:40pm
Attendees:	Arrived	Departed	
Client Y55	4:18	6:30	
Client R22	4:10	6:40	
Client SG1	4:05	6:40	

Step 1: Building the client table T_ServiceDetailOfClient

Our external data has a list of attendee names like "Client Y55", these clients will need to be correctly matched with clients in InfoNet. (If the client has not yet been entered into InfoNet, then that must be completed first). To match, use the Export Clients feature. This might give you an output like this:

Client ID	Client Code	Sex	Ethnicity	Race	First Contact Date
2107896	Z56	Female	Unknown	White	11/7/2018
2112143	R22	Female	Non Hispanic/Latino	Black/African American,Native Hawaiian or Other Pacific Islander	12/5/2017
2092226	Y55	Female	Non Hispanic/Latino	Black/African American,Hispanic/Latino	3/14/2018
2095087	SG1	Transgender female (male to female)	Hispanic/Latino	Hispanic/Latino	1/15/2019

1991987	LO5	Male	Non Hispanic/Latino	White	6/30/2016
---------	-----	------	---------------------	-------	-----------

From this output, we can see readily that Client Y55, Client R22, Client SG1 match with “Client Codes” column. The InfoNet internal ClientIDs are 2092226 for Y55, 2112143 for R22, and 2095087 for SG1.

This is then enough to start entering data into our access file, by entering in

ClientID	CaseID	ServiceID	SVID	ServiceDate	LocationID
2092226	1				
2112143	1				
2095087	1				

those three clientIDs into the T_ServiceDetailofClient table.

CaseID in many cases will be 1, however if the specific clients you are working with have had multiple cases (or episodes), then you may need to update this field manually with the current open case for each client.

For ServiceID, the best information from our record is “Understanding Trauma.” To determine the best code, two references are necessary , first the service programs list in the appendix of this manual, and second your own organization. From the record and the appendix, a few options could make sense; Adult Group Counseling (42), Counseling: Group (89), or Group Therapy (101). That is assuming because clients attended it is not public education. Generally it will be necessary to create a lookup table between your organization’s system and the correct service codes in InfoNet by consulting with your own staff. For the sake of this example, we will assume that Understanding Trauma was an Adult Group Counseling Topic and code it as 42.

The next column to be completed is SVID, for Staff IDs. Because this is a group session and has multiple staff, we leave this empty for now. We will return to it once we are entering those details.(If this were not you would lookup the staff ID using Export Staff in much the same way we did for the client, and enter their name here.)

ServiceDate is 1/31/2019.

LocationID will be your CenterID. Again for the sake of this example, we will use the CenterID for the InfoNet Domestic Violence training site, which is 2. In practice you can call or write InfoNet help to learn your center’s ID number.

At this point your file should look something like this:

ClientID	CaseID	ServiceID	SVID	ServiceDate	LocationID	ReceivedHours
2092226	1	42		1/31/2019	2	
2095087	1	42		1/31/2019	2	
2112143	1	42		1/31/2019	2	

To complete ReceivedHours, we need to process some of the data from our source system. Client Y55 arrived at 4:18pm and left at 6:30pm, so she attended for 2 hours and 12 minutes. ReceivedHours is not formatted into hours and minutes, so instead of 2:12 we should write 2.25, remembering to round to the nearest quarter hour. For the other two clients: one attended exactly 2.5 hours, and the other stayed an extra five minutes. For this example, we consider both 2.5, however your agency or funding program may have rules to always round either up or down. In either case, InfoNet is standardized on 15 minutes increments.

The final four columns are ShelterBegDate, ShelterEndDate, AgencyRecID, and Agency_ics. ShelterBegDate and ShelterEndDate must stay blank because our example is a group session. AgencyRecID should be an index of unique records for services that you upload. It does not need to start with zero or even be consecutive, however it must be tracked to ensure you do not overwrite your data with future uploads. Let's consider that these are the first records we will upload, and then assign then AgencyRecIDs of 1, 2, and 3. If we added more later they should be 4,5,6, etc.

Finally, Agency_ics is similar except for instead of indexing records of the client services, it is indexing group sessions. We will start with 1. Since all three clients are attending the same session, we enter 1 for each of them.

At this point the file should look like this:

ClientID	CaseID	ServiceID	SVID	ServiceDate	LocationID	ReceivedHours	ShelterBegD	ShelterEndD	AgencyRecID	Agency_ics
2092226	1	42		1/31/2019	2	2.25			1	1
2095087	1	42		1/31/2019	2	2.5			3	1
2112143	1	42		1/31/2019	2	2.5			2	1

Step 2: Building the Group Services table T_ProgramDetail

Continuing with the same data, if we tried to upload it as is, it would fail because these records are marked as from a group attendance session (the first session from our agency, as marked in Agency_ics = 1). That session

does not exist. On the Group Services table (T_ProgramDetail), there needs to be a row that summarizes what occurred for that group session.

Tables	Agency_ics	Programid	NumOfSessions	PDate	ParticipantsNum	Hours
T_ProgramDetail	1	42	1	1/31/2019	3	2.50
T_ProgramDetail_St...	0	0	1		0	0.00
T_ServiceDetailOfCL...						

To enter/create that record, we do not need much more than what is already on records from the client attendees (i.e. the data on the last table). First, we must set the Agency_ics to match the corresponding attendance record(s). This is simply to create the link between all of the records, the number does not mean anything else, it just needs to be unique for that session and match on all records related to that session.

Second, we set the column Programid to match what we entered as the ServiceID on the attendance records—42 for Adult Group Counseling. While that step may seem odd, it helps to understand that in InfoNet the group level record is stored alongside program services such as outreach programs. This is also why a group service session can have attendees that are not clients, because that is what many program services are. By the same token, the list of program services and individual services are also stored in the same place, the Programs and Services table in the appendix. Note that Data Exchange does not presently allow inserting other program services, please contact Info support if that is a need.

Third (and skipping NumOfSessions for a moment) PDate should be the same date as the ServiceDate for attendees, in this case 1/31/2019. Note that InfoNet will allow you to upload mismatched data, so long as it is linked by the Agency_ics. It does however require a value and the upload will fail if one is missing. In case of mismatches for ServiceID and ServiceDate, the Programid and PDate from this table will be loaded into InfoNet.

This leaves three columns; NumOfSessions, ParticipantsNum, and Hours; that are unique for the Group level record. NumOfSessions, is the Number of Sessions. This will normally be “1”, as most InfoNet users upload records of each group session individually. That is what we are doing in this example. For ParticipantsNum, we will generally enter the number of clients who attend, 3 in our example. Note that this number can be higher than the number of clients, indicating that one or more non-clients also attended. For Hours we enter the total hours (from the clock), rounded to the nearest fifteen minutes, as a decimal. From our example the actual session itself ran from 4:05pm to 6:40pm, so we round to two and half hours and enter 2.5 here.

Step 3: Entering Staff time on T_ProgramDetail_Staffs

Before uploading, the final detail about the group session we must enter is the staff time. As a reminder, here are the details of our staff from the session.

Facilitator 1:	Juhi	Time:	1h,2 prep, .25 travel
----------------	------	-------	-----------------------

Facilitator 2:	Tonya	Time:	2h,.5 prep, .75 travel
----------------	-------	-------	------------------------

On the staff table, we only need these details and the session number. We will also need to know the staff ID from InfoNet, obtained by referencing the output from Export Staff.

Staff ID	Last Name	First name	Staff Type	Personnel Type	Start Date	Termination Date
120	Solanki	Juhi	S	Staff, Direct Service	5/1/2003	
9702	Roundtree	Tonya	V	Volunteer, Direct Service	12/5/2018	
7034	Ortiz	Jain	S	Staff, Non Direct Service	6/13/2017	9/30/2018

Like the output from Export Clients, there will likely be many non-relevant rows. Also, there will be additional details that may be useful for making sure we have the right person (last name, whether they were a volunteer) for importing into the other system.

At the moment, the only things we need are Juhi and Tonya's Staff IDs 120 and 9702. With these details and our session number, it is straightforward to create the staff entries.

Tables	Agency_ics_id	SVID	HoursOfConduct	HoursPrepare	HoursTravel
T_ProgramDetail	1	120	1.00	2.00	0.25
T_ProgramDetail_Staffs	1	9702	2.00	0.50	0.75
T_ServiceDetailOfClient	*	0	0.00	0.00	0.00

We create one row per staff or volunteer per session. First, we enter the session id (Agency_ics_id, in our example 1). Then we enter the Staff ID into SVID, 120 for Juhi and 9702 for Tonya. Finally, we enter how many Conduct Hours (time spent presenting/actively running sessions, etc) as HoursOfConduct, time spent preparing beforehand (or wrapping up afterwards) as HoursPrepare, and finally travel time as HoursTravel.


At this point the data in the file should be ready for upload.


Step 4: Uploading the data into InfoNet

To upload the data into InfoNet, first save the database as a file. Remember, it must be an MS Access 2000 file (.mdb), even if you are using a later version of Access or using LibreOffice Base. The filename must also be ServiceDetail_2.mdb, where 2 should be the center number of your organization. (Leave it as 2 if you want to practice on the dvtraining center in InfoNet.)


Once you have save the file, login to InfoNet and select **↕ Data Exchange, Import Services**. This will take you to the Import Services screen where, if there have already been uploads to your center, you will see some files already there.

Import Services			
Browse... <small>No *.mdb file selected for import.</small>		Import	
File Name	Last Modified	Size	Action
ServiceDetail_2.log	Thursday, February 28, 2019 1:56:20 PM	4 KB	Download Trash
ServiceDetail_2.mdb	Thursday, February 28, 2019 1:56:17 PM	388 KB	Download Trash
Refresh			

The files you may see will be named ServiceDetail_2.mdb, ServiceDetail.log, and possibly a third file name: ServiceDetail_ExceptionRecords.csv . These files are the last file uploaded, the system's log (with details of its processing any major errors), and an exception report (if only certain records were excluded). While you will want to review these files after you upload the file, *you will need to delete them before uploading a new file* by using the trash can icon  at the end of each row on the screen.

After removing the old files, select Browse..., find the file on your computer, then click Import  to start InfoNet processing the file. InfoNet may or may not process the file immediately, depending on whether or not other InfoNet users are processing files (or perhaps large reports) and how large the file is. Often, however, small files will process very quickly and the file, the log, and if applicable exception details will appear almost immediately. There is a good chance that the first few times you attempt an upload, there will be some minor error. If so, then the system will provide you feedback so that you may be able to quickly change the file and retry successfully. (Expect that you will need to do this several times while learning the specific issues that are likely to occur in your workflow.)

Step 5: Read the log, exceptions, and quick check data.

After uploading and processing the file, there will be a log file. You should *always* download this by pressing the download icon  and then read it. Most of the file will be the same each time, stating that InfoNet read the file, how many records it read, etc. If there were major errors, for example often a file

may have some issues with the file format itself, then you will need to review them in the log. As an example, here is what a log looks like when that happens.

```

-----
3/4/2019 10:25:45 AM | Loading and Validating: ServiceDetail_2.mdb
-----
3/4/2019 10:25:45 AM | Table loaded: T_ServiceDetailOfClient (0.047 sec)
3/4/2019 10:25:45 AM | Center programs and services loaded. (0 sec)
3/4/2019 10:25:45 AM | Center programs and services loaded. (0 sec)
3/4/2019 10:25:45 AM | Center staff loaded. (0 sec)
3/4/2019 10:25:45 AM | Center client and cases loaded. (0.062 sec)
3/4/2019 10:25:45 AM | Center client move dates loaded. (0.031 sec)
3/4/2019 10:25:45 AM | Center funding date IDs loaded. (0.016 sec)
3/4/2019 10:25:45 AM | Invalid client case records removed. (0 sec)
3/4/2019 10:25:45 AM | Invalid staff records removed. (0 sec)
3/4/2019 10:25:45 AM | Invalid service type records removed. (0 sec)
3/4/2019 10:25:45 AM | Validated Service records. (0 sec)
3/4/2019 10:25:45 AM | Invalid received hours records removed. (0 sec)
3/4/2019 10:25:45 AM | Assigned Funding Date ID. (0 sec)
3/4/2019 10:25:45 AM | Assigned Town, Township, County ID. (0 sec)
-----
3/4/2019 10:25:45 AM | ERROR: Table has incorrect number of fields: T_ProgramDetail.
-----
3/4/2019 10:25:45 AM | Exception: System.Exception
3/4/2019 10:25:45 AM | Message: ERROR: Import table [T_ProgramDetail] schema does not match the expected format.
3/4/2019 10:25:45 AM | Source: InfonetData
3/4/2019 10:25:45 AM | Stack Trace:
3/4/2019 10:25:45 AM |    at Infonet.Data.Importing.ServicesImport.LoadGroupProgramDetailImportTable()
   at Infonet.Data.Importing.ServicesImport.ImportServiceRecordsGroupProgramDetail()
   at Infonet.Data.Importing.ServicesImport.LoadAndValidate()
-----
3/4/2019 10:25:45 AM | Services Import failed: unrecognized error occurred while loading and validating ServiceDetail_2.mdb
-----

```

Here you can see the line stating, “ERROR: Table has incorrect number of fields: T_ProgramDetail.” Although InfoNet cannot tell you exactly what to change, it will try to tell you the type of issue that is in the file, and roughly where it is located. In this case, the user had left an extra column in that file. Mislabelling a column or having the data type not match (e.g. numbers stored as text) will receive similar messages.

Remember that these are not quirks in InfoNet, but common parts of this type of work. Also note major errors from InfoNet’s perspective are usually file related, like format and headers, rather than data related. If you are reading this far, then you are building a simple computer interface, and it is going well. Just read the log, read your file, try a change or two in the file, and try again if you are unsuccessful. If you need help, call or e-mail InfoNet.

Once all errors have been corrected, you will get a log that looks something like this:

3/4/2019 10:12:06 AM		Table loaded: T_ProgramDetail (0.062 sec)
3/4/2019 10:12:06 AM		Invalid service type records removed. (0 sec)
3/4/2019 10:12:06 AM		Validated Program Detail records. (0 sec)
3/4/2019 10:12:06 AM		Assigned Funding Date ID. (0 sec)

3/4/2019 10:12:06 AM		Table loaded: T_ProgramDetail_Staffs (0.062 sec)
3/4/2019 10:12:06 AM		Invalid staff records removed. (0 sec)

3/4/2019 10:12:06 AM		Table loaded: T_ServiceDetailOfClient (0.047 sec)
3/4/2019 10:12:06 AM		Invalid client case records removed. (0 sec)
3/4/2019 10:12:06 AM		Validated Service records. (0 sec)
3/4/2019 10:12:06 AM		Assigned Funding Date ID. (0 sec)
3/4/2019 10:12:06 AM		Assigned Town, Township, County ID. (0 sec)

3/4/2019 10:12:06 AM		Saving to SQL Server: ServiceDetail_2.mdb

3/4/2019 10:12:06 AM		Data Table: T_ServiceDetailOfClientIndividual does not contain any records to import.
3/4/2019 10:12:07 AM		Data Table: T_ServiceDetailOfClient does not contain any records to import.
3/4/2019 10:12:07 AM		Valid records saved. (0.109 sec)

3/4/2019 10:12:07 AM		Dumping Exceptions to CSV: ServiceDetail_2.mdb

3/4/2019 10:12:07 AM		Dumped exceptions to: ServiceDetail_2_ExceptionRecords.csv (0 sec)
3/4/2019 10:12:07 AM		No ExceptionRecordsPgmDetail to dump.
3/4/2019 10:12:07 AM		No ExceptionRecordsStaff to dump.

3/4/2019 10:12:07 AM		Calculating Import Statistics: ServiceDetail_2.mdb

Valid Record Count: 6		
Invalid Record Count: 3		
Records Added: 0		
Records Updated: 6		
Total Records Imported: 6		
Records per Second: 10.684		
Total Elapsed Time: 0.562 sec		
=====		

In this log, there were no major errors, and you can see a summary at the bottom of the file.

This is almost what you want to see. In this case, however, there were exceptions. It is helpful to view the ServiceDetails_2_Exceptionsrecords.csv output next.

ClientID	CaseID	ServiceID	ServiceID	ServiceDate	LocationID	ReceivedHours	ShelterBegDate	ShelterEndDate	AgencyRecID	AgencyID	ExceptionComments
2092226	1	101		1/31/2019 0:00	2	2.25			1	1	ClientID-CaseID combination do not exist in Infonet Database
2112143	1	101		1/31/2019 0:00	2	2.5			2	1	ClientID-CaseID combination do not exist in Infonet Database
2095087	1	101		1/31/2019 0:00	2	2.5			3	1	ClientID-CaseID combination do not exist in Infonet Database

In the far right column, ExceptionComments, InfoNet gives a clear message “ClientID-CaseID combination do not exist in InfoNet Database.” This is fine as the data was necessarily fake for this example. If we changed the ClientID

and CaseId to match real clients in the database then it would work. In fact, to write this example, it was necessary to first make sure the file worked and then intentionally break it in just this way to get the message to use as an example.

You will eventually reach a point when your file uploads generate no errors or exceptions. It is a best practice to nonetheless check for a record or two from your file in InfoNet. For example, if we had successfully uploaded this file, we would search for group sessions on Jan 31st in order to make sure the service and attendee list was accurate. While this is technically an unnecessary step, it is always be to verify your work. On rare occasions, you may find a data error that InfoNet did not flag (using an existing but no longer used service code, for example) and it is better to find that first and immediately correct it.

Administration questions and answers

Center Information

Q: How often should Center Information be entered?

A: Center Information is entered as part of the initial connection to InfoNet and whenever major details such as address/location, name, or director changes.

Lookup List Editors

Q: Who decides what editing should be done to our three Lookup Lists: Agency, Other Staff Activities and/or Funding Sources?

A: When ICADV or DHS secures new funding sources or grants for agency services, these will be added to InfoNet statewide. Otherwise, your agency decides what your local needs are. When editing these lists, remember that you want the lists to be specific to your local need, but not so specific that you won't be able to use the options in the long term. Once you add an entry to a list, it is very difficult to remove.

Q: Is creating an Agency Lookup List a requirement, so that we can document outside agencies receiving presentations and making referrals?

A: No. Your agency may determine the extent to which to use this function, but doing so will be very helpful toward better understanding client referral patterns and assessing impact of outreach/training efforts to other community organizations..

Funding for Staff

Q: Do I need to enter a new funding statement at the beginning of each fiscal year?

A: Yes. Enter a new funding statement every July 1st to reflect the new fiscal year funding information. Even when it is not necessary to update

the information because it remains the same as in the previous fiscal year, you must add a new statement each July 1st anyway. This ensures you will always have a clean fiscal year of accurate funding information.

Q: When do I need to add new funding statements during the fiscal year?

A: Any time staff or funding changes. You should add a new statement and make appropriate revisions any time you have turnover in staff positions, when there is a shift in how staff are funded, or when there is a shift in staff responsibilities.

It is required that you make these revisions for your VOCA and/or VAWA positions, but should also be made with other funding sources if that funder requires grant specific information. It is important to make these revisions as soon as possible after changes become effective.

Q: Do I need to enter a separate statement for each site?

A: Yes, if your InfoNet database includes different accounts for each program location, and grant funded staff are providing services at each location.

Q: I cannot find the staff person I need to add to my new funding statement. What should I do?

A: First make sure that staff person is entered in Administration→Staff Information. If this person has a record, confirm their Start Date is not *after* the Funding for Staff statement date. An employee's Start Date must be on or before the Funding for Staff statement date for them to appear as an available staff person in the list. Also, confirm that no date is entered in their Termination Date field.

Staff and Volunteer Information

Q: When a staff person leaves the program, should this person be deleted from the system? Do I replace her staff record with her replacement's name?

A: No. When a staff person resigns, view their record in Administration → Staff (or Volunteer) Information. Enter their Termination Date and click Save. Then, click the Add New button to add a new staff person. If you replace the former staff person's name with the new person's name, all the services and activities entered for the former staff person will reference the new staff person's name. You do NOT want to do that. If at some point this person returns to the program, you can remove their Termination Date. This will restore their name to the staff drop down lists.

Q: How do I update a staff person's name if she gets married and/or her name changes?

A: View her existing record in Administration→Staff (or Volunteer) Information. Edit her Last Name, then click the Save button. We

recommend hyphenating new last names with the old at least temporarily, rather than replacing the former name. This alleviates confusion while users become accustomed to the change.

Use this feature with caution! It's *never* a good idea to edit both a staff or volunteer's First AND Last Name at the same time. This will make it appear as though a staff record was mysteriously deleted from your database, and could cause a painful data situation.

Q: How do I change a Volunteer record to a Paid Staff record or vice versa?

A: Sometimes you may have a volunteer that becomes a paid employee, or vice versa. Follow these steps when this occurs:

- 1) View this person's record in Administration→Volunteer Information.
- 2) Enter their last day as a volunteer as their Termination Date.
- 3) Edit the First Name field. Click in this field and *after* their first name, type in (*volunteer*). Then click Save.
- 4) Next, click the Paid Staff tab.
- 5) Click Add New to create a new Paid Staff record.
- 6) Enter this person's information in the corresponding fields. Make sure you enter the first date they started *as a paid staff member* in the Start Date field. The Termination Date field should be left blank.
- 7) Click Save.

Perhaps a paid employee who resigns will stay on as a volunteer. In that case, follow the same steps, but enter a Termination Date on the Paid Staff page and a Start Date on the Volunteer page.

If a staff person acts in both a paid staff *and* a volunteer capacity, follow the same steps but leave the termination dates for both paid staff and volunteer records blank.

In any of these three situations, it is VERY important that you always follow Step 3 above, as instructed. This applies a visual label so this person's volunteer record can always be visually distinguished from their paid staff record.

Appendix

DHS Required Fields

DHS funded providers are asked to submit the following fields:

- New, Ongoing and Total Clients and Cases
- Basic Demographic Information (Adults and Child) including Gender, Race and Age at First Contact.
- Adult Client Information including Employment, Education, Health Insurance, Marital Status, Pregnant, Primary Income Source, Number of Children, Referral Source(s), Special Needs, Primary Presenting Issue and Primary Presenting Issue Location. These fields demonstrate eligibility and evaluation for safety and service planning.
- Child Client Information including Education, Child Abuse, Custody, Lives With, and Special Needs. These also demonstrate eligibility and evaluation activities for safety and service planning.
- The fields within the Service Report which are required include any of the Direct Client Services which your program provides, Shelter Information, Hotline Information, and Community, Institution and Group Services which include direct client group services.
- At this time, DHS is not requiring that you submit services for Staff Training, Media Activities, Other Staff Activities and Volunteer Information (the subset of services).
- DHS is not requiring the Medical and Criminal Justice Involvement Reports.
- To demonstrate accurate information and quality services DHS asks that you minimize the use of Unknown and Unassigned.
- Understanding the human element of recording services and client information, DHS recognizes that the data entered and evaluated will never be perfect.
- Also, the definitions for the various service categories and client descriptors may not encompass every exception. We'll rely on your choice of the most appropriate descriptor.
- A newer section for turned away victims is required as part of the InfoNet reports. This is a Federal reporting requirement.

Service and Program Codes

Table updated last on March 6th, 2019. Note that other values exist, however they are used for non-DV services or services not supported by data import (e.g. events).

Direct/Group/Residential	Code	Description
Direct Service	45	Civil Legal Advocacy/OP
Direct Service	46	Collaborative Case Management
Direct Service	48	Criminal Legal Advocacy/Charges
Direct Service	49	Criminal Legal Advocacy/Obtain OP
Direct Service	99	Evaluation/Assessment
Direct Service	119	Housing Advocacy
Direct Service	57	IDVA Legal Services/Attorney
Direct Service	58	Individual Children's Counseling
Direct Service	102	Individual Therapy
Direct Service	59	In-Person Counseling
Direct Service	60	Legal Advocacy/Advocate
Direct Service	61	Legal Services/Attorney
Direct Service	120	Legal Services/Attorney – Type 2
Direct Service	63	Lock Up/Board Up
Direct Service	52	Medical Assistance
Direct Service	67	Other Advocacy
Direct Service	70	Telephone Counseling
Direct Service and Group Services	43	Art Therapy
Direct Service and Group Services	44	Child Care
Direct Service and Group Services	47	Conflict Resolution
Direct Service and Group Services	50	Economic Assistance

Direct Service and Group Services	51	Educational Assistance
Direct Service and Group Services	53	Employment Assistance
Direct Service and Group Services	62	Life Skills
Direct Service and Group Services	68	Parental Services
Direct Service and Group Services	69	Substance Abuse Services
Direct Service and Group Services	71	Transportation
Group Services	42	Adult Group Counseling
Group Services	4	DV Court Orientation
Group Services	54	Family Counseling
Group Services	101	Group Therapy
Group Services	55	Group: Children's Counseling
Group Services	56	Group: IDVA Advocacy
Residential Services	65	Off-Site Shelter
Residential Services	66	On-Site Shelter
Residential Services	118	Transitional Housing

Summary of Available Reports

This section contains brief summaries of the contents of all the Standard, Management, and Exception Reports, including the sub-options (i.e. checkboxes when selecting each report).

Standard Reports

Standard Reports provide Client total counts broken down by the listed elements.

1. Client Information
 - a. Basic Demographics

Reports Client Counts for each group of elements included.

 - i. Gender Identity

- ii. Ethnicity
 - iii. Race
 - iv. Age at First Contact
 - v. Adult Client Information
 - 1. Sexual Orientation
 - 2. Veteran's Status
 - 3. Employment
 - 4. Education
 - 5. Health Insurance
 - 6. Non-Cash Benefit
 - 7. Marital Status
 - 8. Pregnant
 - 9. Primary Income Source
 - 10. Monthly Income Ranges
 - 11. Number of Children
 - vi. Child Client Information
 - 1. Education
 - 2. Child Abuse (DCFS)
 - 3. Custody
 - 4. Lives With
- b. Referral Source
- c. Special Needs
 - i. Special Needs
 - ii. Disabling Condition
 - iii. Physical Disability
 - iv. Developmental Disability
 - v. Primary Languages
- d. Presenting Issues
 - i. Primary Presenting Issue
 - ii. Primary Presenting Issue Location
- e. Aggregate Client Information

- i. HIV/AIDS
 - ii. Mental Health
 - iii. Substance Abuse
 - f. Residence/Destination Information
 - i. Residence Type
 - ii. Length of Stay in Previous Place
 - iii. Destination
 - iv. Destination Tenure
 - v. Destination Subsidy
 - vi. Reason for Leaving
 - vii. Shelter/Homeless Use
- 2. Service/Programs

Provides counts of clients who received service, unique service contacts, and service hours for selected service type(s).

 - a. Direct Client Services
 - i. Direct Client Services
 - ii. Shelter Services
 - iii. Transitional Housing
 - b. Community, Institutional and Group Services
 - i. Group Services
 - ii. Information and Referral
 - iii. Institutional Advocacy
 - iv. Professional Training
 - v. Public Education
 - vi. School
 - vii. Training
 - viii. Other Activities
 - ix. Publication Information
 - c. Volunteer Service Information
 - i. Direct Client Services
 - ii. Hotline Calls
 - iii. Community, Institutional, and Group Services

- d. Hotline/Information Referral
- e. Service Outcomes Service Report
 - i. Shelter
 - ii. Support Groups
 - iii. Counseling
 - iv. Legal Advocacy
 - v. Other Supportive Services & Advocacy
 - vi. Children's Services
 - vii. Total
- f. HUD/HMIS—only use under ICJIA advisement, being replaced

3. Medical/Criminal Justice Process

Reports Client Counts for each group of elements included

- a. Offenders
 - i. Gender
 - ii. Race
 - iii. Age
 - iv. Relationship of Offender to Victim
 - v. Visitation
- b. Medical System Involvement
 - i. Medical Facility visit
 - ii. Treated for Injuries
 - iii. Seriousness of Injuries
 - iv. Photos Taken
 - v. Type of Medical Facility
 - vi. Evidence Kit Used
 - vii. Severity of Abuse
- c. Police Involvement
 - i. Reported to Police
 - ii. Patrol Interview with Victim
 - iii. Detective Interview with Victim
 - iv. Suspect Arrested

- v. Suspect Charged
 - vi. Charge Type
 - vii. Police Charges
- d. Prosecution Involvement
 - i. State's Attorney Interview with Victim
 - ii. Suspect Charged
 - iii. Trial Scheduled
 - iv. Trial Type
 - v. Court Activity
 - vi. Victim/Witness Participation
 - vii. State's Attorney Charges
 - viii. Court Disposition
 - ix. Sentence Type
- e. Order of Protection
 - i. New Orders of Protection
 - 1. Status of Orders filed this Period
 - 2. Type of Order filed this Period
 - 3. Forum of Orders issued this Period
 - ii. Upgrade in the Type of Order
 - 1. Type of Upgrades
 - iii. Active Orders of Protection only
 - 1. Order Activity
 - 2. Violations

Management Reports

- 1. Client Reports
 - a. Client Detail

Provides a list of ClientIDs and Case number for reporting period.
 - b. Child Behavioral Issues

Client Counts for Child Behavioral Issues
 - c. Income Source Management Report

Provides client counts for Primary Income Source and client

counts for income ranges. Income ranges are defined by you when you run the report.

- d. Staff & Service Reports
- e. Staff/Client Service Information
 - Multifunctional tool for summarizing or outputting Service information. Output can either by individual service or it can be used to aggregate/group by staff or service. Columns may be selected/removed to achieve desired output.*
 - i. Staff Name (can be used to sort or group)
 - ii. Client ID (can be used to sort or group)
 - iii. Service Name (can be used to sort or group)
 - iv. Service Date
 - v. Service Hours
- f. Staff/Community, Institutional & Group Services Information
 - i. Staff name
 - ii. Service Name
 - iii. Service Date
 - iv. Number of Presentation/Contact Hrs
 - v. Total Number of Participants
 - vi. Staff Presentation Hrs
 - vii. Staff Preparation Hrs
 - viii. Staff Travel Hrs
 - ix. Agency
 - x. Location
- g. Staff/Media/Publication Information
 - i. Staff Name
 - ii. Media/Publication Type
 - iii. Date
 - iv. Title
 - v. Prepare Hours
 - vi. Number of Segments
 - vii. Staff Preparation Hours
- h. Staff/Hotline Call information

- i. Staff Name
 - ii. Hotline Call Type
 - iii. Hotline Call Date
 - iv. Hotline Call Contacts
 - v. Hotline Call Time
 - vi. Optional columns that can also be used to order output
 - 1. Town
 - 2. Township
 - 3. County
 - 4. ZIP
- i. Staff Report

Provides a report summary of clients and services provided filterable by individual staff name.

 - i. Age at First Contact (grouped by selectable range)
 - ii. Ethnicity
 - iii. Race
 - iv. Direct Client Services
- j. Other Staff Activity Report
 - i. Staff Name (sortable)
 - ii. Activity (sortable, or groupable)
 - iii. Date (optional)
 - iv. Conduct Hours (optional)
 - v. Travel Hours (optional)
 - vi. Prepare Hours (optional)
- k. Turn Away Information
 - i. Number of Adult Victims
 - ii. Number of Children
 - iii. Number of Families
 - iv. Referral Made to Another Shelter
- l. Cancellation/No Show Information
 - i. Client ID (sortable)
 - ii. Service Name (sortable)

- iii. Staff Name (sortable)
- iv. Date (optional)
- v. Reason

2. Other Reports

a. Order of Protection Report

Summarizes either Orders issued during report period or Orders expired, selectable. Includes following columns:

- i. Client ID
- ii. Date Issued
- iii. Date of Expiration
- iv. Original Order Type

Exception Reports

1) Clients Without Service Record

List all Client IDs without any service record, ever. Note that time spent completing intake may be entered as a service.

2) Open & Lengthy Shelter Dates

Lists all Client IDs with an open or closed shelter stay longer than the selected number. Default is longer than 60 days.

3) First Contact Date Later Than Service Date

List all Client IDs, Case Id, First Contact and Service Dates where the First Contact (with the agency) came after the first Service Date. In almost all cases either the First Contact should be adjusted to the Service Date, or a new case should be started.

4) Orders of Protection Without Expiration Date

Lists the Client ID, Case ID, and Date Issued for all Orders of Protection without any expiration date.

5) Open Client Cases

Lists all Client IDs, Case IDs, and the Date of Last Service for all clients with open cases who have not been served for over the selected number of days. Default is longer than 60 days.

6) Clients without Presenting Issues

Lists Client ID, Case ID, and First Contact Date for all clients without an answer to Primary Presenting Issue. Indicates an incomplete intake.

7) Clients with Unknown/Not Reported/Unassigned Data fields

Lists Client ID, CaseID, Client Type, First Contact Date, and Client Status for all clients missing any of the listed elements. Note that elements may be selected to filter for missing just that element, or all elements may be selected.

- a) Race
 - b) Age
 - c) Employment
 - d) Education
 - e) Health Insurance
 - f) Marital Status
 - g) Pregnant
 - h) Primary Income
 - i) Number of Children
 - j) School
 - k) Custody
 - l) Lives With
 - m) Referral Source
 - n) Primary Presenting Issue
 - o) Location of Primary Offense
 - p) Child Behaviors
 - q) Residence
- 8) Clients without Offender Information

Lists Client ID, Case ID, Client Type, First Contact Date, and Client Status for all clients without any Offender information.

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