

DuPage County CommunityPoint Resource Database

Development Policy

Revised March 9, 2016

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The mission and purpose of the CommunityPoint database is to provide a trustworthy and comprehensive basic needs resource database to DuPage County residents and agencies using current best practices in order to meet the individual and organizational 'resource database' needs in the community.

SECTION 1 – INTRODUCTION & MISSION

The DuPage County Community Resource Information System (“C.R.I.S.” or CRIS) was established as the leading source of social service information in DuPage County. The CRIS Resource Database was the first of its kind. The database connected social service agencies to individuals in the community via electronic communication. The need for such a resource directory is well understood. A well designed resource directory will help residents connect to resources, identify unmet needs in the community, provide a venue for agencies to do outreach, meet the needs of helping professionals to access resource information and increase community capacity by eliminating duplicative resource collection and allowing for better customer service.

The Data and Reporting Unit for the DuPage County Department of Community Services began analyzing the current state of the DuPage CRIS resource database. It was found that DuPage CRIS was **not considered** to be a valuable resource tool for the general public nor for trained Information and Referral staff. Public opinion of the CRIS resource database is generally negative. Users state that the site is not easy to use and that they cannot find what they are searching for. DuPage County staff do not generally use the resource database for the same reasons and have instead developed internal tools for gathering and distributing resource information to their clients (The Helper, Age Well DuPage, Research & Development resource listings, shared folders, etc.).

Data quality reports on the records in DuPage CRIS show that 881 resources exist in the database. 136 resources have never been officially updated, 169 have not been reviewed or updated in over one year. Universally, the resources are not properly indexed to the approved AIRS Taxonomy and the resources listed have not been properly vetted against the posted ***Inclusion/Exclusion criteria***. Initial parity project research shows that the CRIS database is also missing many essential resources.

The purpose of this policy is to provide clear and concise guidance to the Persons trained to update resources(s) in order to support the mission of the CommunityPoint database. The mission of the database is to provide a trustworthy and comprehensive basic needs resource database to DuPage County residents and agencies using current best practices in order to meet the individual and organizational ‘resource database’ needs in the community.

The CommunityPoint Development Policy provides directives on managing resources that will be included and excluded from the database as defined by the Inclusion/Exclusion Policy. In addition, detailed descriptions are provided on how resources will be identified based on service indexing, what data elements will be included, and how such data elements will appear. This policy also provides guidance on the required resource review and update to further ensure that the most valid and applicable information is being delivered to the community.

This policy will be reviewed and updated by the Data and Reporting Unit frequently over the next 12 months, with the support of the DuPage County Information and Referral and Assistance Units. This plan will be reviewed and approved by the Director of Community Services. The CommunityPoint Development Policy is to be used as the foundational document to receive accreditation through the Alliance of Information & Referral Services (AIRS).

In order to begin the re-branding process of the CRIS database, we will not use the term CRIS in the remainder of this Development Policy. The CRIS database will be referred to as CommunityPoint resource database- the name of the software used for the management of the resource database.

SECTION 2 – INCLUSION/EXCLUSION PLAN

The CommunityPoint resource database is designed to be a comprehensive resource database. Any organization or entity meeting the Inclusion/Exclusion criteria may be included. However, the focus of the database is on those services offered to those located in DuPage County where the service meets an **essential human and/or economic need**. Areas targeted include: clothing and household goods, education, employment, income and financial resources, individual and family support, legal, food, health (dental, medical, mental), housing and utilities, and transportation. Agencies and services must meet all criteria, as explicitly stated within the Inclusions/Exclusion Plan, to be included in the CommunityPoint resource database.

Geographic Area

Agencies to be included within this database must provide services to those located within DuPage County, Illinois.

Agency Types

For inclusion:

1. Non-profit organizations
2. Government entities
 - a. Federal
 - b. State
 - c. County
 - d. Local Government Agencies
3. For-profit businesses offering services to the general public at:
 - a. No cost
 - b. Sliding-fee
 - c. Will accept government or nonprofit payment
 - d. Or meets a unique human service not otherwise available from a nonprofit provider

For exclusion:

1. Organizations that do not expressly meet the inclusion criteria.
2. Organizations that provide services to members only.
3. Organizations that are sufficiently covered through other referral resources already included in the database.
4. Organizations that don't have at least one established service site that clients can physically visit should the service require it; excluding web- and telephone-based services that otherwise meet the inclusion requirements.
5. Organizations that do not have at least one-full time staff person that is regularly available to communicate with Information and Referral staff.
6. Organizations that primarily serve for a political cause or are an issue-oriented action group.
7. Organizations that engage in fraudulent, discriminatory or illegal activities.
8. Organizations that misrepresent their services in any way.

Other Inclusion Considerations

The following items will also be considered when an agency applies for inclusion in the database:

1. Degree of demand/need for the services offered
2. Number of agencies in the database currently offering the service

Exclusion/Removal Criteria

DuPage County Community Services reserves the right to exclude organizations from the CommunityPoint resource database that do not meet the inclusion criteria as explicitly stated within the Inclusion/Exclusion Plan. Potential grounds for exclusion or removal from the database may include, but is not limited to:

1. Failure to provide listed services to eligible applicants
2. Fraud
3. Misrepresentation
4. Discrimination
5. Criminal activity
6. Agency no longer meets inclusion/exclusion criteria
7. No response from the agency to three consecutive requests for updated information (at least one will be via phone or physical letter)

Statement of Responsibility

Inclusion in the CommunityPoint resource database should not be construed to constitute an endorsement of an agency, organization or its services, nor should exclusion be construed to constitute disapproval. The CommunityPoint database provides resource information, not endorsements, recommendations or ratings of potential service providers.

Appeal Policy

DuPage County Community Services reserves the right to remove or exclude any organization from the database at any time that the organization does not meet the criteria as outlined in this plan.

Complaints regarding the exclusion, inclusion, description, removal or indexing of an organization or its service(s) may be submitted in writing or via email to the System Administrator. All complaints will be considered in light of the CommunityPoint Development Policy. The party filing the complaint will be notified in writing of the final decision and justification thereof.

Any further objection to the decision of the System Administrator must be submitted in writing to the *Director of Community Services* whose determination will be returned to the complainant in writing. All decisions by the Director of Community Services are absolute.

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Complaints regarding the delivery of a service to a client should be submitted to the organization or entity that provided/refused to provide the service. The System Administrator should also be informed of complaints so that they may keep the resource database current with only those agencies whose referrals are helpful to the community. In the event that egregious

service non-delivery, fraud, discrimination, or misrepresentation is discovered, *DuPage County Community Services* reserves the right to remove the agency from the database.

SECTION 3 – PARITY PROJECT & RESOURCE WEEDING

Parity Project

In order to further assess both resource coverage and accuracy, resource database staff will continuously conduct parity projects on service topics throughout the year. These projects will be targeted based on identified community needs, insufficient resource coverage, and annual formal reviews. Staff will utilize local resource directories that are maintained outside of CommunityPoint as identified

Resource Weeding

The System Administrator will cleanse the database of information or records that meet the following criteria:

1. Resources which no longer meet the inclusion criteria
2. Resources that are not in use by HMIS and are not operational.
3. Duplicate Resources
4. Resources which few or no public page views have been made in the past 12 months
5. Resources whose staff are unresponsive to requests for updated information

Only the System Administrator, with consultation of the HMIS System Administrator, is authorized to remove resources. Removal of resources may have significant reporting and financial repercussions.

SECTION 4 - RESOURCE REVIEW AND UPDATE

All resources in the CommunityPoint database are to be reviewed and updated by a trained Resource Specialist. A trained Resource Specialist is defined as a person who has completed training by the System Administrator and who has been given the authorization and permission to create and edit resource records.

Formal Updates constitute a complete audit of each data element and service(s), where this information shall be verified by a Resource Specialist in order to assure accuracy of the data. In addition, the data entry must be completed according to the provided *Style Guide*¹. Each resource record must be Formally Reviewed on an annual basis.

Informal Updates can occur anytime a change is required to reflect updates to incorrect or new data, where the review or update does not meet the criteria for a *Formal Update*. Once the change is saved, the system will generate the *Last Updated Date* to reflect the last time this record was reviewed, edited and saved.

Reporting and Monitoring the resource provider Formal Update is completed through the system's Advanced Reporting Tool (ART). Report, *1311-Resource Update Monitor*, generates a list of all resource providers sorted by their last Official Update date. This report is to be reviewed and acted upon on a monthly basis.

¹ Reference Sections 5, 6, and Appendix A.

SECTION 5 – SERVICE INDEXING

All resources in the CommunityPoint resource database must be properly indexed. The System Administrator and Resource Specialist, and their explicit designees, are the only individuals to modify service indexing.

Taxonomy

Taxonomy terms provide a detailed description of a particular service in addition to assigning both a term and a code to that description. The taxonomy terms used within this database are adopted from the *AIRS/211 LA County Taxonomy of Human Services*, without customization, and are updated to the CommunityPoint resource database by the software vendor two times per year. The System Administrator reserves the ability to inactivate taxonomy terms that are not utilized in the community.

Taxonomy terms are organized on a tree structure that may include multiple levels or branches. Only primary services will be considered and are indexed to the most appropriate taxonomy term based on the term's description compared to that of the service being provided. Same type services are to be indexed to the same taxonomy term to ensure consistency and allow for accurate search results. Services may be indexed to multiple terms on the same level, but at no time can be indexed to multiple terms on various levels, also known as "double indexing". All services must be indexed to at least a level two taxonomy code or greater. Final indexing decisions are decided by the System Administrator.

Target Terms

Target terms provide additional search criteria allowing for the Information and Referral Specialist to further identify resources that are specific to a particular population such as homeless persons or youth. Target terms should only be selected if the population served is not the general population and if the target population is already explained in the detail of the assigned taxonomy term.

Modalities

Modalities can also be added to further identify appropriate resources when applicable. Adding a modality terms is optional. Effective use of a modality term is to distinguish between different delivery models of a particular service such as counseling. One may further distinguish appropriate counseling referrals based on available counseling settings such as individual, group, and family.

SECTION 6 – DATA ELEMENTS

All data elements of all resource records must be formally reviewed. The following data elements are the minimum data requirements to be completed for each and every resource record. An audit of these elements will be completed by the System Administrator frequently until all records are found to be in compliance. At that point forward, all records will be reviewed at least annually to ensure accuracy and continued compliance.

Each record must, at minimum, contain the following data elements which conform to the CommunityPoint Style Guide and Service Indexing Procedure:

Provider Profile

1. Agency/program name
2. Also known as (AKA) name for agency/program
3. Parent Provider (if applicable)
4. AIRS Official Update
 - a. Official update date
 - b. Person requesting change
 - c. Organization requesting change
 - d. Change description
5. Description of 2-4 sentences regarding the agency/program's main purpose.
6. AIRS designation of either agency/site
7. Legal Status of the agency
8. Facility / Organization type
9. Physical address if site is accessible to the public
10. Mailing address if different from the physical address
11. Contact numbers including description, number and extension
12. Name and Title of the Director or Administrator
13. Contact personnel for Resource updating purposes
 - a. Name
 - b. Email address
 - c. Phone number
 - d. Primary contact
 - e. Receives email
14. Website
15. Administrative Hours and Days of operation
16. Program fees
17. Intake/application process (including Documents Required)
18. Eligibility criteria
19. Languages (other than English)
20. Handicap access
21. Available for public site
22. Available for printed directory
 - a. Inclusion in The Helper or Age Well DuPage

Services

1. Geography served listed by All Areas, State, County or zip code
2. Primary services provided (See Service Indexing)
3. Target terms and Modalities will be applied only when the service does not apply to the general population and is not described in the taxonomy description. (See Service Indexing)
4. Service details should only be listed if such details are not already made available or are different from that in the Provider Profile:
 - a. Required documents
 - b. Eligibility
 - c. Fees
 - d. Intake/application process
 - e. Languages (other than English)
 - f. Service offered outside of physical location
 - g. Available for a printed directory
 - h. Available for referral
 - i. Available for research
 - j. Last verified date
- k. Resource contact information
 - i. Name
 - ii. Phone
- l. Telephone number(s) if different than that listed on the Provider Profile
 - i. Type
 - ii. Function
 - iii. Confidential
 - iv. Toll-free

SECTION 7 – STYLE GUIDE

The DuPage County CommunityPoint resource database will strive to align with the 2016 AIRS Style Guide. The Style Guide goes through each mandatory data element and describes the proper grammar, punctuation, capitalization, italics, abbreviations, use of numbers and hyphens and sentence structure to be used in each individual data element. The primary principles of the AIRS style guide are clarity, accessibility, easy of training, brevity, naturalness of language, accuracy of information, consistency and relevance. All persons trained to update resources will be given sufficient training on the 2016 AIRS Style Guide before being given permission to update resource records. The System Administrator will provide a simple training document on the Style Guide to all persons trained to update resources. A style guide quick reference sheet has been prepared as a helpful tool.

The 2016 AIRS Style Guide can be found here: <http://www.airs.org/i4a/pages/index.cfm?pageid=3362>

APPENDIX A: DUPAGE STYLE GUIDE QUICK REFERENCE

Provider Creation	Styling	ServicePoint Crosswalk
Provider Tree Structure	<ol style="list-style-type: none"> 1. Agency (required) 2. Site or Program (if applicable) 3. Program (if applicable) <p>Program providers will only be created if the program can not be sufficiently presented in the Agency level description or in the service details (various contact information/locations, hours, eligibility, etc.).</p> <p>*If this is an HMIS Provider, contact the HMIS System Administrator(s)*</p>	
Agency/program name	<ol style="list-style-type: none"> 1. Official name; doing business as 2. Styled as listed publically, including acronyms and ampersands. 3. Omit punctuation from abbreviations 4. Avoid abbreviations when possible 5. Capitalize each significant word 6. Governmental programs should all be listed uniformly, with the name beginning with the level of jurisdiction. (DuPage County Health Department) 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Provider Name
Also known as (AKA) name for agency/program	<ol style="list-style-type: none"> 1. Only to be included if applicable 2. The style should follow what is commonly known by the public. 3. Eliminate use of punctuation, hyphens, and apostrophes here. 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Agency/Program(AKA)
AIRS Compliant	Check box –select to access AIRS specific fields and to designate the record as meeting AIRS Standards.	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ AIRS Compliant
Operational	Check box-Select if agency/program is operational and should be viewed through ResourcePoint.	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Operational

Provider Profile	Styling	ServicePoint Crosswalk
Date Updated	<ol style="list-style-type: none"> 1. Add an official update when adding as new and for each Formal Update. 2. Include date of the change/addition, who requested the update, and specify what details were updated/added. 3. If no changes were made during the Formal Update, notate no changes were made. 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ AIRS Official Updates
Description	<ol style="list-style-type: none"> 1. 2-4 sentences regarding the agency/program’s main purpose. 2. Short concise sentencing using a simple language, not technical terms. 3. No acronyms or abbreviations 4. Do not duplicate data that is already provided in the given data fields. 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Description
Physical address (if site is accessible to the public)	<ol style="list-style-type: none"> 1. Avoid use of abbreviations 2. Eliminate use of periods and # (use Unit or Suite in place of #) 3. Proper capitalization and spelling 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Location Information
Mailing address	<ol style="list-style-type: none"> 1. Avoid use of abbreviations 2. Eliminate use of periods and # (use Unit or Suite in place of #) 3. Proper capitalization and spelling 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Location Information
Contact numbers including description, number and extension.	<ol style="list-style-type: none"> 1. If there is a number including a word/name, include both the numerical and word versions. 2. Including extensions 3. Provide a one-word description for each number such as: Main, Toll-free, TDD, or include the description of the function (intake). 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Contact Numbers
Contact personnel (person/department)	<ol style="list-style-type: none"> 1. Add the Director or Administrator and Resource Contact Staff 2. Add agency/program email addresses if available 	<ul style="list-style-type: none"> • Provider Profile <ul style="list-style-type: none"> ○ Contact Personnel
Name	Proper capitalization and spelling	
Description	“Resource Contact” for Resource Contact Staff	
Title	Add proper titles, with correct spelling	
Email address (optional)	Valid email address	
Phone number (optional)	Include extensions when applicable	
Hide from Provider Profile	Select check box for all persons listed	
Primary contact	Select check box to designate one primary contact	
Receives Email	Select check box if this person/program should receive resource update requests.	

Hours	<ol style="list-style-type: none"> Monday to Friday, 9:00 am – 5:00 pm If varying days/times, create a list by hitting return after each Monday, 8:30 am - 7:30 pm Tuesday and Wednesday, 8:30 am - 5:00 pm Thursday, 8:30 am - 7:30 pm Friday, 8:30 am - 10:30 am 	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Hours
Program fees	<ol style="list-style-type: none"> Brief descriptions Numbered Lists (as shown below) <ol style="list-style-type: none"> No fees Sliding scale Medicaid Self-pay 	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Program Fees
Intake/application process	<p>Clear and concise next steps in a numbered list, including required documentation.</p> <ol style="list-style-type: none"> Call for an appointment Complete application online Provide photo ID and proof of address 	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Intake/Application Process
Eligibility criteria	<ol style="list-style-type: none"> General eligibility criteria Numbered lists <ol style="list-style-type: none"> Homeless 60 years of age or older Families with Children Disabled 	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Eligibility
Languages	<ol style="list-style-type: none"> List only non-English languages Language must be regularly available 	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Languages
Handicap access	Select Yes/No button to show if provider's site is accessible.	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Handicap Access
Brochures	Select Yes/No button to show if provider has brochures available.	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Brochures
Available for Public Site	Select Yes/No button if provider should appear on the public site.	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Show on Public Site
Available for printed directory	Select Yes/No button if this provider should appear in a printed resource directory.	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Printed Directory
Shelter *not required by AIRS	Select Yes/No button if this provider is a shelter	<ul style="list-style-type: none"> Provider Profile <ul style="list-style-type: none"> Additional Information <ul style="list-style-type: none"> Is Shelter

Standards Information	Styling	ServicePoint Crosswalk
AIRS designation of either agency/site	Check box - select either Agency or Site to describe this provider	<ul style="list-style-type: none"> • Standards Information <ul style="list-style-type: none"> ○ AIRS Standards Information <ul style="list-style-type: none"> ▪ AIRS Designation
Legal Status	Drop-down selection – select the correct option for this provider	<ul style="list-style-type: none"> • Standards Information <ul style="list-style-type: none"> ○ AIRS Standards Information <ul style="list-style-type: none"> ▪ AIRS Designation

Services	Styling	ServicePoint Crosswalk
Geography Served	<ol style="list-style-type: none"> 1. Select <i>Serves All Geographies</i> – Yes/No 2. Or Select State, County, or Zip Code(s) served through the <i>Manage Geography Served</i> 	<ul style="list-style-type: none"> • Services <ul style="list-style-type: none"> ○ Serves All Geographies ○ Geography Served
Primary services provided	<ol style="list-style-type: none"> 1. Service terms selected from the AIRS taxonomy, that describe the main reason(s) someone would contact this provider for service(s). 2. Services that require a referral or current program participation shall not be included. 3. Secondary or Occasional services will not be included. 	<ul style="list-style-type: none"> • Services <ul style="list-style-type: none"> ○ Services Provided <ul style="list-style-type: none"> ▪ Primary Services

Service Details	Styling	ServicePoint Crosswalk
	Service details should only be listed if such details are not already made available or are different from that in the Provider Profile.	<ul style="list-style-type: none"> • Primary Services <ul style="list-style-type: none"> ○ Manage Service Details
Description	<ol style="list-style-type: none"> 1. 2-4 sentences regarding the agency/program’s main purpose. 2. Short concise sentencing using a simple language, not technical terms. 3. No acronyms or abbreviations 4. Do not duplicate data that is already provided in the given data fields. 	
Hours	<ol style="list-style-type: none"> 1. Monday to Friday, 9:00 am – 5:00 pm 2. If varying days/times, create a list by hitting return after each Monday and Thursday, 8:30 am - 7:30 pm Tuesday and Wednesday, 8:30 am - 5:00 pm Friday, 8:30 am - 10:30 am 	
Eligibility	<p>General eligibility in a numbered list</p> <ol style="list-style-type: none"> 1. Unsheltered persons 2. 60 years of age or older 3. Families with Children 4. Disabled 	
Intake/application process	<p>Clear and concise next step in a numbered list</p> <ol style="list-style-type: none"> 1. Call for an appointment 2. Walk in for service 3. Referral required 	
Required documents	<p>Brief one+ word description(s) in a numbered list</p> <ol style="list-style-type: none"> 1. Photo ID 2. Income verification 3. Proof of residency 	
Fees	<p>Brief one+ word description in a numbered list</p> <ol style="list-style-type: none"> 1. No fees 2. Sliding scale 3. Free 4. Medicaid 5. Self-pay 	
Languages	<ol style="list-style-type: none"> 1. List only non-English languages here 2. Language must be regularly available 3. Separate listed items with (#) 	
Service offered outside of physical location	Select Yes/No button if services are available offsite.	
Available for a printed directory	Select Yes/No button if service is available for a printed directory.	

Available for referral	Select Yes/No button if service is available for referral.	
Available for research	Select Yes/No button if service is available for research purposes.	
Last verified date	Enter the date that this resource was last verified.	
Resource contact information	This data is pulled from the Contact Personnel listed on the Provider Profile. Select the appropriate resource contact person	<ul style="list-style-type: none"> • Manage Service <ul style="list-style-type: none"> ○ Resource Contact Information
Telephone number(s)	This data is pulled from the Provider Profile. Select the appropriate phone number	<ul style="list-style-type: none"> • Manage Service <ul style="list-style-type: none"> ○ Telephone Numbers
Type	Select the type from the drop-down list	
Function	List the function of this number; examples include: a. Intake b. Administration	
Confidential	Check box – select if this number is a confidential line	
Toll-free	Check box- select if this number is toll-free	
Seasonal Information	Add the season’s start and end dates to reflect when this service is available on an annual basis	
Geography served listed by zip code	Select All areas, State, County, or Zip Code(s) from Geography Served	

Revision History

- July 31, 2013 – Original publication
- March 1, 2016 – Removed language pertaining to the tasks needed to clean up and implement a new resource database. Updated Inclusion/Exclusion plan to align with the current needs in the system. Updated style guide for additional clarification and to align with AIRS 2016 Style Guide.