DuPage County Resource Database

Development Policy

Last Revised March 26, 2021

DuPage County Community Services

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The mission and purpose of DuPage CRIS 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

The purpose of this policy is to provide clear and concise guidance to the persons trained to update resources in order to support the mission of DuPageCRIS, the DuPage County resource 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. DuPage CRIS increases community capacity by eliminating duplicative resource collection, providing a self-guided database to connect those to the resources most likely able to assist, and provides data on community needs to inform system planners and policy makers.

The DuPageCRIS Development Policy provides directives on managing resources that will be included or 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 in the database. 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 shall be maintained by the Intake and Referral Unit and reviewed at minimum once every 3 years, where changes are to be submitted to the Director of Community Services for approval.

SECTION 2 – INCLUSION/EXCLUSION PLAN

The DuPageCRIS resource database is designed to be a comprehensive resource database. Any organization or entity meeting the Inclusion criteria may be incorporated. The focus of the database are services offered to persons located in DuPage County where the service meets either an essential human 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 DuPageCRIS resource database.

Geographic Area

Agencies to be included within this database must provide services to those located within DuPage County, Illinois, or are providing 211/Information and Referral services in the State of 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. Accredited Colleges/Universities that are located within DuPage County
    e. Providers of senior services
    f. 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 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 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 DuPageCRIS 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 are 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 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 DuPageCRIS 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 DuPageCRIS database provides resource information, not endorsements, recommendations or ratings of potential service providers.

Appeal Policy

DuPage County Community Services reserves the right to exclude any organization, program, or service from the database at any time that the organization, program, or service 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 to the System Administrator. All complaints will be considered in light of the Resource 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. If there is an egregious non-delivery of service, fraud, discrimination, or misrepresentation of services, 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, Intake and Referral 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 DuPageCRIS as identified.

Resource Weeding

On an annual basis, the Senior Research Coordinator/Research & Communications Specialist will inactivate 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 Senior Research Coordinator is authorized to inactivate resources. Inactivation of resources may have significant reporting and financial repercussions.

SECTION 4 - RESOURCE REVIEW AND UPDATE

All resources in the DuPageCRIS 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 or Senior Research Coordinator 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, 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 reporting tool. 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 7

SECTION 5 – SERVICE INDEXING

All resources in the DuPageCRIS resource database must be properly indexed using the 211 LA County Taxonomy of Human Services. Service indexing should only be managed by trained Resource Specialists.

Taxonomy

The taxonomy terms used within this database are adopted from the 211 LA County Taxonomy of Human Services and are updated by the software vendor two times per year. Taxonomy terms provide a detailed description of the service or organization and help classify the services being provided. These terms are organized in a hierarchy and may include multiple levels, with each level providing more specific and targeted information. The System Administrator reserves the ability to inactivate taxonomy terms that are not utilized in the community, but customization of the taxonomy will not be allowed.

Only primary services [2]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 across all resource providers to help 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 a trained Homeless Management Information System (HMIS) user to further identify resources that are specific to a particular population. Use of target terms are optional at this time and 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. This feature is only available through HMIS and is not available through the public website, dupagecris.org.

Modalities

Modalities can be added to further identify a specific type of setting or delivery of service, as in counseling services. Adding a modality is optional and is only visible to trained users through the Homeless Information System (HMIS).

[2] Primary Services are described as those services often made available to first time clients/customers, or the primary reason why someone would contact the agency.

SECTION 6 – DATA ELEMENTS

All data elements of each resource record must be formally reviewed upon creation and on an annual basis. The following data elements are the minimum data requirements to be completed for every resource record. A monthly audit of these elements will be completed by the Senior Research Coordinator to help ensure compliance.

Provider Profile

1. Agency/program name
2. Also known as (AKA) name for agency/program
3. AIRS Official Update
    a. Official update date
    b. Name and Agency Requesting Change
    c. Change Description
4. Description
5. Physical address
6. Mailing address
7. Contact numbers
8. Email
9. Name and Title of the Director or Administrator
10. Name, Title, Phone and Email for Resource Contact
11. Website
12. Hours and Days of operation
13. Program fees
14. Intake/application process (including Documents Required)
15. Eligibility
16. Languages (other than English)
17. Access for People with Disabilities
18. Available for public site
19. Available for printed directory

Standards Information

1. AIRS designation of agency/site
2. Legal Status of the agency
3. Provider Maintaining
4. License/Accreditations
5. Payment Methods Accepted

Services

1. Geography served
2. Primary services
3. Description
4. Hours
5. Eligibility
6. Intake/Application Process
7. Required documents
8. Fees
9. Languages (other than English)
10. Service offered outside of physical location
11. Available for a printed directory
12. Available for referral
13. Available for research
14. Last verified date
15. Resource contact information
16. Telephone number(s)
    a. Type
    b. Function
    c. Confidential
    d. Toll-free
17. Geography Served

SECTION 7 – STYLE GUIDE

The DuPageCRIS resource database was created to align with the most recent AIRS Standards and 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, ease of training, brevity, naturalness of language, accuracy of information, consistency and relevance. All Resource Specialist shall be trained on the Style Guide and how to enter the data as prescribed.

Provider Creation	**Styling**	**HMIS Crosswalk**
Provider Tree Structure	1. Agency (required) 2. Site (if applicable) 3. Program (if applicable) ***If this is an HMIS Provider, contact the HMIS System Administrator(s)***	1. In Provider Admin, search for the provider record 2. If no existing record, locate provider DuPage County Resource Database (3738) 3. Select the Maintenance Tab →Add Provider→ Add Subordinate Provider 4. Enter Provider Name and Submit Repeat this process for each Site record as applicable, but instead of using the DuPage County Resource Database record, locate the Agency Record.
Agency/Program name	1. Official name; doing business as 2. Styled as listed publicly, 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) 7. Site records that share the same name as the Agency should be listed as 'Agency Name – Location'	• Provider Profile ○ Provider Name
Also Known As (AKA) Names	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. 4. Use commas to separate multiple AKAs	• Provider Profile ○ Agency/Program (AKA)
AIRS Compliant	Check box –select to access AIRS specific fields and to designate the record as meeting AIRS Standards.	• Provider Profile ○ AIRS Compliant

Operational	Check box-Select if agency/program is operational and should be viewed through ResourcePoint. This also effects the ability to make this record visible in DuPageCRIS.	• Provider Profile ○ Operational

Provider Profile	**Styling**	**HMIS Crosswalk**
Date Updated	1. Add an official update when adding as new and for each Formal Update. Also add for interim/informal updates. 2. Include date of update, who requested the update, and specify what details were updated/added. 3. For informal updates, include date of update, who requested the update, specify what details were updated/changed. If update/change was requested and/or initiated by the resource specialist, method of verification must be noted (verified from website, press release, agency newsletter, etc.) 4. If no changes were made during the Formal Update, notate this.	• Provider Profile ○ AIRS Official Updates
Description	1. 1-4 sentences/phrases regarding the agency's main purpose. 2. Short concise sentencing using a simple language, no technical terms. 3. No acronyms or abbreviations 4. Do not duplicate data that is already provided in the given data fields.	• Provider Profile ○ Description
Physical address	1. If the address is confidential, list 'Call for Details' 2. If there is no physical location (i.e. website listings) than leave blank. 3. Address Type: Physical 4. Avoid use of abbreviations 5. Eliminate use of periods and # (use Unit or Suite in place of #) 6. Proper capitalization and spelling	• Provider Profile ○ Location Information
Mailing address	1. Requested for all Agencies/Programs 2. Address Type: Mailing 3. Avoid use of abbreviations 4. Eliminate use of periods and # (use Unit or Suite in place of #) 5. Proper capitalization and spelling	• Provider Profile ○ Location Information

Phone Number(s) and Type(s)	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).	• Provider Profile ○ Contact Numbers
Name and Title of Director/Manager, Email, and Resource Contact personnel	1. Include the Name and Title of the Director/Manager (Public), omitting any contact information 2. Name and Title of the Resource Contact Staff (Hidden), and a description of 'Resource Contact'. 3. If the Resource contact is the Director/Manager, create 2 contact records, one for the public site and one for internal purposes. 4. Add agency/program email addresses if available (Public) with the Title providing a brief description of the email address (general, intake, etc.). 5. Ensure the resource contact is marked to receive emails.	• Provider Profile ○ Contact Personnel ▪ Name ▪ Description ▪ Title ▪ Email address ▪ Phone Number ▪ Hide from Provider ▪ Primary Contact ▪ Receives email
Days/Hours of Operation	1. Record the agency hours – the provider record should indicate the administrative hours 2. Service specific hours will be recorded in the Service Details 3. Monday to Friday, 9:00 am – 5:00 pm 4. If varying days/times, create a list by hitting return after each. Example below: Monday, 8:30 am - 7:30 pm	• Provider Profile ○ Additional Information ▪ Hours
Fee/Payment Options	1. Do not list actual cost data 2. List forms of payment accepted in numbered lists (as shown below) (1) No fees (2) Sliding scale (3) Medicaid (4) Self-pay (5) Fees vary by program. Call for details.	• Provider Profile ○ Additional Information ▪ Program Fees

Application/Intake Process	1. Clear and concise next steps of what a person should do/expect now that they have the resources information, provided in a numbered list. 2. Including required documentation. 3. Avoid blanket statements like, 'Call for more information.' Examples below: (1) Call for an appointment (2) Complete application online (3) Provide photo ID and proof of address	• Provider Profile ○ Additional Information ▪ Intake/Application Process
Eligibility criteria	1. General eligibility criteria 2. Numbered lists Examples below: (1) Homeless (2) 60 years of age or older (3) Families with Children (4) Resident of Wheaton	• Provider Profile ○ Additional Information ▪ Eligibility
Languages Available	1. List only non-English languages 2. Language must be regularly available 3. Indicate access to language interpretation services (such as Language Line) wherever applicable, keeping the phrase consistent throughout database.	• Provider Profile ○ Additional Information ▪ Languages
Access for People with Disabilities	Select Yes/No button to show if provider's site is accessible.	• Provider Profile ○ Additional Information ▪ Handicap Access
Brochures	Select Yes/No button to show if provider has brochures available.	• Provider Profile ○ Additional Information ▪ Brochures
Available for Public Site	Select Yes/No button if provider should appear on the public site.	• Provider Profile ○ Additional Information ▪ Show on Public Site
Available for printed directory	Select Yes/No button if this provider should appear in a printed resource directory.	• Provider Profile ○ Additional Information ▪ Printed Directory
Shelter	Select Yes/No button if this provider is a shelter	• Provider Profile ○ Additional Information ▪ Is Shelter

Standards Information	**Styling**	**HMIS Crosswalk**
AIRS designation of either agency/site	Check box - select either Agency or Site to describe this provider record	• Standards Information ○ AIRS Standards Information ▪ AIRS Designation

Legal Status	Drop-down selection – select the correct option for this provider	• Standards Information
		  ○ AIRS Standards Information
		    ▪ AIRS Designation

License/Accreditation	Select an option from the drop-down.	• Standards Information
		  ○ AIRS Standards Information
		    ▪ License Type

Fee/Payment Options	Select all forms of payment accepted.	• Standards Information
		  ○ AIRS Standards Information
		    ▪ Payment Methods Accepted

Services	**Styling**	**HMIS Crosswalk**

Geography Served	1. Select *Serves All Geographies* – Yes/No
	2. Or Select State, County, or Zip Code(s) served through the *Manage Geography Served*
		• Services
		  ○ Serves All Geographies, OR
		  ○ Geography Served

Primary services provided	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.	• Services ○ Services Provided ▪ Primary Services
Description	1. 1-4 sentences/phrases regarding this service 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	• Primary Services ○ Manage Service Details

Days/Hours of Operation	1. Record the hours the service is available
	2. Monday to Friday, 9:00 am – 5:00 pm
	3. If varying days/times, create a list by hitting return after each. Example below:
	Monday, 8:30 am - 7:30 pm
	Tuesday and Wednesday, 8:30 am - 5:00 pm
		• Primary Services
		  ○ Manage Service Details
		    ▪ Hours

Eligibility	General eligibility in a numbered list
	(1) Unsheltered persons
	(2) 60 years of age or older
	(3) Families with Children
	(4) Resident of Wheaton
		• Primary Services
		  ○ Manage Service Details
		    ▪ Eligibility

Application/Intake Process	Clear and concise next step in a numbered list 1. Call for an appointment 2. Walk in for service 3. Referral required	• Primary Services ○ Manage Service Details ▪ Intake/Application Process
Documents Required	Brief one+ word description(s) in a numbered list. Example below: (1) Photo ID (2) Income verification (3) Proof of residency	• Primary Services ○ Manage Service Details ▪ Required Documents
Fee/Payment Options	1. Do not list actual cost data 2. List forms of payment accepted in numbered lists (as shown below) (1) No fees (2) Sliding scale (3) Medicaid (4) Self-pay (5) Fees vary by program. Call for details.	• Primary Services ○ Manage Service Details ▪ Fees
Languages Available	1. List only non-English languages here 2. Language must be regularly available 3. Separate listed items with (#)	• Primary Services ○ Manage Service Details ▪ Languages
Service offered outside of physical location	Select Yes/No button if services are available offsite.	• Primary Services ○ Manage Service Details ▪ Service Offered Outside Site Physical Location
Available for a printed directory	Select Yes/No button if service is available for a printed directory.	• Primary Services ○ Manage Service Detail ▪ Available for Directory
Available for referral	Select Yes/No button if service is available for referral.	• Primary Services ○ Manage Service Detail ▪ Available for Referral
Available for research	Select Yes/No button if service is available for research purposes.	• Primary Services ○ Manage Service Details ▪ Available for Research
Last verified date	Enter the date that this resource was last verified.	• Primary Services ○ Manage Service Details ▪ Last Verified Date
Resource contact information	This data is pulled from the Contact Personnel listed on the Provider Profile. Select the appropriate resource contact person	• Primary Services ○ Manage Service Details ▪ Resource Contact Information
Telephone number(s)	This data is pulled from the Provider Profile. Select the appropriate phone number	• Primary Service ○ Manage Service Details ▪ Telephone Numbers

Type	Select the type from the drop-down list	• Primary Service ○ Manage Service Details ▪ Telephone Numbers
Function	List the function of this number; examples include: a. Intake	• Primary Service ○ Manage Service Details ▪ Telephone Numbers
Confidential	Check box – select if this number is a confidential line	• Primary Service ○ Manage Service Details ▪ Telephone Numbers
Toll-free	Check box- select if this number is toll-free	• Primary Service ○ Manage Service Details ▪ Telephone Numbers
Seasonal Information	Add the season's start and end dates to reflect when this service is available.	• Primary Service ○ Manage Service Details ▪ Seasonal Information
Geographic Area Served	Select All areas, State, County, or Zip Code(s) from Geography Served	• Primary Service ○ Manage Service Details ▪ 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.
- July 19, 2019 – Language updated throughout. Added accredited Colleges and Universities and agencies in Illinois providing 211/Information and Referral to the Inclusion policy. Updated the style guide based on AIRS recommendations and feedback from team members and users.
- March 26, 2021 – Added Senior Services to the Inclusion Policy. Clarified hours and language provided in the Style Guide. Updated the naming convention for DuPageCRIS throughout the document. Clarified roles responsible throughout the document.