

General Report Functionality

Frequently Used Reports

1 Click on the <Contacts> tab, and you will see a short list of frequently used reports. Note: This list may change over time to include additional reports.

The screenshot shows the NewOrg Management Center interface. The 'Contacts' tab is selected, and a green arrow points to the 'Reports' section in the left sidebar. The main content area displays a 'Contact Search' form and a table of 'Found 3 Contacts'.

Code	Send	Name	Company	Address	Email	Phones	Role	Group	Status	User	Updated
JX		Karen Doe		123 Main St, Anytown, IL 11111,			Grandmother	1) Baby TALK	Active	DEMO	8/12/2017
LX		Lilly Lundt		... USA			Mother	1) Baby TALK	Active	DEMO	8/14/2017
SX		Sam Smith		... USA			Father	1) Baby TALK	Active	DEMO	8/14/2017

Family Events – Agency and Family Events – Staff

You are recommended to use this report frequently to check the accuracy of your tracking in the system.

Family Events-Agency

The screenshot shows the configuration screen for the 'Family Events-Agency' report. It includes various filters and search criteria.

Active Report	Saved Criteria
Create Date	Child Enrollment Status: Type in either "Enrolled" or "Exited"
Type	
Role	
Status	
Event Status	Activity
Division	
Program	
Program Location	
Last Name	
First Name	
Birth Date	

This report will show you a family's event history. You can use this report also to see if a form has been affiliated to an event or not. It will also tell you when the first date of a specific event type took place.

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Click on <Reports> tab and Expand the list marked "Clients"

The screenshot displays the BabyTALK web application interface. At the top, there is a navigation bar with the following tabs: Web Content, Settings, Logout, and Help. Below this, a secondary navigation bar contains icons and labels for Home, Contacts, Events, Staff, Reports, and File. The Reports tab is currently selected and highlighted in blue. A green arrow points from the '1' in the instruction to the Reports tab. Below the navigation bar, a 'Report List' sidebar is visible. It includes a 'Show Void' link and a list of report categories. The 'Clients' category is expanded, indicated by a minus sign icon next to its name. A green arrow points from the '1' in the instruction to the 'Clients' category. The expanded list includes the following items:

- All families
- Eligibility Screening Scores
- Enrolled while Pregnant Famili
- Enrollment to Exit
- Family Events by mth-agency
- Family Events-Agency
- Family Events-User
- FRA Dates
- FRA Scores
- IFSP Dates
- IFSP Progress
- Personal Encounter Details
- PI Families-agency
- PI Families-user
- Referrals by family

REPORT	FUNCTION	NOTES	ISBE Monitoring
All Families	General searching, viewing family structures. Runs relatively quickly as it accesses high-level values within contacts.	Returns a list of primary and sub-contacts grouped under the primary contact. Good for searching for all contacts recently added to help facilitate verification of data	N/A
Eligibility Screening Scores	Summary of eligibility screening scores.	Grouped by scores, initially showing each family with those scores. Requires family data be up to date regarding “active” indicators and “designation of need” to ensure current PI families are included for monitoring reporting.	How many (and percentage) of currently enrolled families reflecting recruitment and enrollment guidelines
Enrolled while Pregnant	List of mothers grouped by “enrolled while pregnant” on their contact record. Returns only those who have had service delivery/events for the date range you enter and event type(s) you select.	Not applicable to monitoring; use “PI Families – Agency” list.	N/A
Enrollment to Exit	List of children exited within the date range you enter with length of time from Child Enrollment event to Child Exit event.	Automatically searches for both enrollment event and exit event based on the exit date range you enter.	Average length of family enrollment for cases that have closed in the past 12 months

REPORT	FUNCTION	NOTES	ISBE Monitoring
Family events by mth-Agency	Grouping of events by family, by month. May be used for any event type(s)	<p>Report grouping is limited to 2 levels; this report is grouped by family and by month</p> <p>For monitoring, to get to comparison between complete and incomplete personal encounters, run/download the report for each “intended intensity of services” value separately and for each event status needed</p> <ol style="list-style-type: none"> 1. Run report once for families receiving weekly personal encounters that have been completed. Use the pivot table view. Highlight the rows/columns and copy/paste into excel. 2. Run report for families receiving weekly personal encounters that have not been completed. Use the pivot table view. Highlight the rows/columns and copy/paste into excel. 3. Use excel to combine and make calculations 4. Repeat steps for bi-weekly visits 	Numbers of families receiving weekly, biweekly and monthly home visits, and the percentage of intended visits families completed (over 6 month time period prior to monitoring visit)
Family Events – Agency	List of events, including all participants. You may see all events across your agency or limit to “assigned to”	Good for checking completeness of event fields (division, program, etc.) and for seeing for which events forms have been created.	As needed ad hoc
Family Events - Staff	List of events, including all participants. This report automatically searches for any events assigned to your userid.	Good for checking completeness of event fields (division, program, etc.) and for seeing for which events forms have been created.	N/A
FRA Dates	List of Family Resource Assessment event types and dates	Good for checking frequency and compliance to the requirement for updates every six months	?
FRA Scores	Outcome report to show change over time		N/A
IFSP Dates	List of Family Resource Assessment event types and dates	Good for checking frequency and compliance to the requirement for updates every six months	<p>Individual Family Service Plan report (IFSP)</p> <ol style="list-style-type: none"> 1. Dates of initial IFSPs 2. Dates of IFSP update

REPORT	FUNCTION	NOTES	ISBE Monitoring
IFSP Progress	Outcome report to show change over time		N/A
Initial Contact/Enrollment/1st Date of Service	Automatically searches for: <ol style="list-style-type: none"> 1. First ever event date 2. Eligibility screening event type/date 3. Child enrollment event type/date 4. Personal Encounter event type/date 	Select role = "Child" to exclude lines for other family members present at any of the relevant events	Time lapse between initial contact and service initiation for currently enrolled families Date of initial contact (Erikson definition: Date family first expressed interest) Date of enrollment (Erikson definition: Date of eligibility screening/signed consents to participate) Date services began (Erikson definition: Date of first visit)
Personal Encounter Details	List values entered within the multiple pages of the personal encounter form. May be used to look at changes in scaled scores over time.	Good source for outcome reporting as it relates to level of parent/child interaction over time.	N/A

REPORT	FUNCTION	NOTES	ISBE Monitoring
PI Families-agency	General list of all Prevention Initiative families assigned to staff within the agency.	<p>Joins to find sub-contact inventory record used for PI children being served.</p> <p>Choose child status of “enrolled” to filter out additional siblings not currently being served.</p>	<p>Enrollment list of all open files</p> <ol style="list-style-type: none"> 1. Family Name 2. Child name 3. DOB of child 4. Home visitor 5. Intended number of visits per month <p>Percentage of currently enrolled families that enrolled prenatally or came from programs that had prenatal services</p>
PI Families-staff	General list of all Prevention Initiative families assigned to your user id.	<p>Joins to find sub-contact inventory record used for PI children being served.</p> <p>Choose child status of “enrolled” to filter out additional siblings not currently being served.</p>	
Referrals by family	List of referrals and all related information tracked on progress and services accessed by families.	General resource referrals (versus EI referrals) are typically not tied to children. Reporting will likely return a combination of primary caregivers and children.	<p>Evidence of referral and follow-up system accessed by families needing additional supports not provided by the program</p> <ol style="list-style-type: none"> 1. Family name, referral source, referral date 2. Date of follow-up

REPORT	FUNCTION	NOTES	ISBE Monitoring
Referrals by referred to	List of referrals, grouped by the “referred to” entered on the referrals. (e.g. agencies, community partners)		Evidence of referral and follow-up system accessed by families needing additional supports not provided by the program
Screening Assess History	List of Screenings (health, developmental, hearing, vision) and related information tracked within the screening events		Screening assessments <ol style="list-style-type: none"> 1. Date of initial assessment 2. Date of follow up dates To include: Developmental, Social Emotional, Health, Hearing, Vision