

1.1: I&R inquiries are a total from both Activity and Calendar Items that are tagged with an activity type containing the word "inquiry". If you have activity types "information inquiry" and "referral inquiry", then any activities or calendar items within the given timeframe coded to either of those will be counted. Note however that while the coding logic hasn't changed, these line items have been consolidated to a single activity type: "information and referral inquiry".

1.2: New cases counts cases whose ultimate top level case type is mediation (meaning any type that is a subcategory of mediation), and whose Date Initiated is on or after the first date of the reporting period and on or before the last date of the reporting period.

1.3: Mediation cases open at the beginning of reporting period is a total of all cases whose ultimate top level case type is mediation (meaning any type that is a subcategory of mediation), whose Date Initiated is *before* the first date of the reporting period, and whose Date Closed is either empty or falls within the reporting period.

1.4 Total mediation cases worked on counts all cases that have had any associated activity or calendar item with a date during the reporting period. Oregon clients also limit to those cases whose ultimate parent case type is mediation.

1.5: New facilitation cases opened is a total of all cases whose ultimate top level case type is facilitation (meaning any type that is a subcategory of facilitation) and whose Date Initiated is on or after the first date of the reporting period and on or before the last date of the reporting period.

1.6: Facilitation cases open at the beginning of reporting period is a total of all cases whose ultimate top level case type is facilitation (meaning any type that is a subcategory of facilitation), whose Date Initiated is on or before the first date of the reporting period, and whose Date Closed is either empty or falls within the reporting period. (Note we may change Date Initiated to be cases before the first day of the reporting period - not "on".)

1.7: Total facilitation cases worked on during reporting period counts all cases that have had any associated activity or calendar item with a date during the reporting period. Note this field only appears for Oregon clients.

1.8: This field sums line items 1.4 and 1.7.

2.1-2.nn: These fields show a summary of all cases -regardless of case type- whose date initiated falls within the reporting period, broken down by the referral source indicated in the case record. If available and "state categories" is chosen in the initial setup screen for this report, only those referral sources so indicated, or their Center-selected descendants, are chosen. So, cases may be excluded from the referral source counts if the parent referral source is something independently entered by a Center. *Actual referral source numbering can vary for center-selected referral sources.

2.18*: When "Other (specify)" is chosen, centers are asked to specify the other as text in the case record. Centers (not the state) can "select fields" on the case list to display the other referral source text. Currently there is no filter in place to limit to just cases with that field filled in, but you can sort on

it.

2.19*: "Unknown (no referral source indicated)" counts cases in the given time frame for which no referral source has been specified.

2.20*: "Total" is the sum of all the line items above it in this section.

Section 3, DRS & Case Type & Disposition

This section shows all of the cases with a closed date within the reporting period that have a Case Disposition entered. (Non-Oregon clients have the option to have the column headings be a pulldown-type custom case field instead of Case Disposition type.) If you clicked on "Include links," and you have appropriate access, then you may audit which cases these counts came from. Oregon clients: you have the option to display the "pending" column, but there should be nothing in it by the time this report is ready for the State.

4.1: This field shows how many staff members had a staff type of "volunteer", whose status was considered active on the day the report was ran.

4.2: This field shows how many staff members had a staff type of volunteer and who participated in at least one activity or calendar item during the reporting period excluding Mail Manager emails. Note: individual staff records currently do not display associated calendar items or activities, so this is more difficult to audit.

4.3: "Volunteer Mediation Hours" counts the hours of activity and calendar items during the reporting period for each designated volunteer staff, where the associated activity/calendar type has "Mediation/Facilitation-related activity" selected. One can see what is set to be volunteer mediation by looking at SETTINGS>Activity and Calendar Types, in the rightmost column. To determine exactly how this total was calculated, click on "Activities" or "Calendar Items" to see a breakdown of items, assuming you have checked "include supporting links" when you first called the Service Report. To be counted as volunteer time, the person completing the item must also have been a volunteer at the time the report was ran. To see if the person is considered a volunteer, you may click on "Staff" to verify. This total counts hours for each person, so if 2 people participated in a 2-hour activity, a total of 4 hours would be counted.

4.4 "Volunteer Administration Hours" shows the total of activity and calendar items during the reporting period for each designated volunteer staff, where the associated activity/calendar type has "Administrative activity" selected. One can see what is set to be volunteer administration by looking at SETTINGS>Activity and Calendar Types. To determine exactly how this total was calculated, click on "Activities" or "Calendar Items" to see a breakdown of items. To be counted as volunteer time, the person completing the item must also have been a volunteer at the time the report was ran. To see if the person is considered a volunteer, you may click on "Staff" to verify. This total counts hours for each person, so if 2 people participated in a 2-hour activity, a total of 4 hours would be counted.

4.5: "Number of all active interns" shows how many staff members had a staff type containing the word

"intern", whose status was considered active on the day the report was ran.

4.6: "Number of interns utilized" shows how many staff members had a staff type of intern and who participated in at least one activity or calendar item during the reporting period, excluding Mail Manager correspondence. Note: individual staff records currently do not display associated calendar items or activities, so this is more difficult to audit.

4.7: "Intern mediation hours" counts the hours of activity and calendar items during the reporting period for each designated intern, where the associated activity/calendar type has "Mediation/Facilitation-related activity" selected. One can see what is set to be volunteer mediation by looking at SETTINGS>Activity and Calendar Types, in the rightmost column. To determine exactly how this total was calculated, click on "Activities" or "Calendar Items" to see a breakdown of items. To be counted as volunteer time, the person completing the item must also have been an intern at the time the report was ran. To see if the person is considered an intern, you may click on "Staff" to verify. This total counts hours for each person, so if 2 people participated in a 2-hour activity, a total of 4 hours would be counted.

4.8: "Intern administration hours" shows the total of activity and calendar items during the reporting period, where the associated activity/calendar type has "Administrative activity" selected. One can see what is set to be volunteer mediation by looking at SETTINGS>Activity and Calendar Types. To determine exactly how this total was calculated, you can click on "Activities" or "Calendar Items" to see a breakdown of items. To be counted as volunteer time, the person completing the item must also have been an intern at the time the report was ran. To see if the person is considered an intern, you may click on "Staff" to verify. This total counts hours for each person, so if 2 people participated in a 2-hour activity, a total of 4 hours would be counted.

4.9: The number of people served by dispute resolution services comes from the field in the case record "People participated and/or affected by services, case development, and/or agreement". The cases that are counted for this field are all cases whose dates indicate they were open at any time during the reporting period.

4.10: The number of press releases indicates every time there was an activity whose type was press release within the reporting period. Press releases can only be activities, not calendar items. To verify what items are only activities, you may go to SETTINGS>Activity and Calendar Types.

4.11: The number of outreach activities shows a total of every outreach activity and calendar item within the reporting period whose activity type was "Outreach".

4.12: The number of participants in outreach activities is calculated from the field in the activity or calendar item that says "Number of participants." If this field is blank, then the number is calculated from the number of participants added to the activity in the contacts section of the activity (meaning an individual record was selected for each participant, instead of just writing how many total participants participated.).

5.1: "Basic mediation training programs" shows how many activity or calendar items had the type "Basic mediation training" within the reporting period.

5.2: The number of trainees completing the training is calculated from the field "Number of participants" in the activity or calendar item. If this field is blank, then the number is calculated from the participants plus staff added in the contacts section.

5.3: The number of continuing education programs for mediators and volunteers is calculated by the number of activities and calendar items within the reporting period whose type was set to "Continuing education programs".

5.4: "Mediators and other volunteers attending continuing education programs" sums the "Number of participants" field in each activity or calendar item within the reporting period. If that field is left blank, it counts the number of staff people assigned to that item. Staff type is not checked.

5.5: The number of specialized trainings for mediators and volunteers is calculated by the number of activities and calendar items within the reporting period whose type was set to "Specialized training".

5.6: "Mediators attending specialized trainings" counts the "number of participants" in the activity or calendar item, if its filled in. If this field is blank, then the number is calculated from the staff associated with the item. Staff type is not checked.

5.7: The number of Community ed programs is calculated by the number of activities and calendar items within the reporting period whose type was set to "Community ed programs".

5.8: The number of participants in community ed programs is calculated by the field "Number of participants" in that activity or calendar item. If that field is blank, then this field is calculated by the number of participants added to the activity or calendar item.

5.9: The number of Youth mediation/conflict management ed programs is calculated by the number of activities and calendar items within the reporting period whose type was set to "Youth mediation/conflict management ed programs".

5.10: The number of participants in Youth mediation/conflict management ed programs is calculated by the field "Number of participants" in that activity or calendar item. If that field is blank, then this field is calculated by the number of participants added to the activity or calendar item.

Section 6. This counts the number of surveys submitted with the given titles.