ANNEX 5: Reporting Guidance | Inter-Agency Referral Monitoring

The Inter-Agency Referral Monitoring Platform aims to maintain an overview of referral practices between service providers in Lebanon, and enhance accountability to referrals. It expands, the good practice established by the protection sector, to require all partners under the LCRP to report on the total number of referrals made, to which sectors and their status on a quarterly basis. The referral analysis that will be generated will be complemented by data from the RAIS and RIMS individual referral systems. This will provide a more detailed analysis of referral trends to better understand blockages in assistance and gaps in coverage.

Communication Process

LCRP partners will be requested to report into the Inter-Agency Referral Monitoring platform on a quarterly basis. This request will be made through sector working groups at the field and national levels.

Reporting Guidance for services and assistance

These instructions explain how to report on referrals conducted through the online Inter-Agency referral monitoring platform, hosted on Activity Info.

Who: Reporting Focal Points – (Activity Info Focal Points, IM Focal Points)

Reporting Timeline: Reporting is on a quarterly basis.

Reporting Period	Reporting Deadline	Reporting Period
January, February, March (Q1)	April 15, 2020	You will no longer be able to report for the quarter once the reporting deadline has closed.
April, May, June (Q2)	July 15, 2020	
July, August, September (Q3)	October 15, 2020	
October, November, December (Q4)	January 15, 2021	

Reporting Requirements:

You will report on the final status of the referrals made at the end of the three month reporting period. There are 4 reporting categories in line with the Minimum Standards on Referral;

No Feedback Received	Referral sent, receiving agency has not confirmed receipt of referral
Referral Acknowledged	Receiving agency confirmed receipt of the referral
Referral Accepted	Receiving agency provided feedback that the referral is accepted and a service will be provided
Referral Not Accepted	Receiving agency provided feedback that they cannot accept the referral (assessment may have been conducted but the individual/household does not meet criteria, NGO is at maximum capacity, lost contact with individual/house-holds)

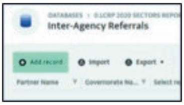
- **The number of referrals made is reported not the number of cases.** This means that if you send two referrals for the same case you will record the two referrals. Example: If you make a referral to agency A, but they were not able to accept the referral, and you send the referral to agency B and they accept the referral. This should be reported as **two separate referrals.**
  - o Referring agency reports -> 1 referral (to agency A) = Referral Not Accepted
  - o Referring agency reports -> 1 referral (to agency B) = Referral Accepted
- **A referral can only be reported once per quarter according to the most recent status of the referral at the reporting deadline. This is the 15th of the following month.**
  - o On 10 March, a referral was made to Agency A, but no feedback has been received by the reporting deadline. The status of the referral will be 'no feedback received'.
  - o On 6 February, a referral was made to Agency A, the referral was acknowledged by the receiving agency on 10 February. On 20 February, the receiving agency confirmed acceptance for the referral. The status of the referral at the reporting deadline would be reported as 'Referral accepted'. It is the most recent status of the referral which will be reported in the database.
- **Only referrals made in the reporting period should be recorded.**
  - o A referral made on 31st March should be recorded in quarter 1 on April 15th.
  - o A referral made on 2nd April, should be recorded in quarter 2, on July 15.

Reporting Steps:

1. Log into https://v4.activityinfo.org/, go to the database *LCRP 2020 Sectors Reporting*

2 Select *16-Inter-Agency Referrals*, and click again on *'Inter-Agency Referrals'*

3. Select 'Add record'



4. Using the drop-down menus select your organisation, the governorate you are reporting on, and the reporting period. You are reporting on referrals made in the last three months. You will need to select the month you are reporting in which represents the previous quarter (ie. Q1 you will select April, Q2 you will select July).

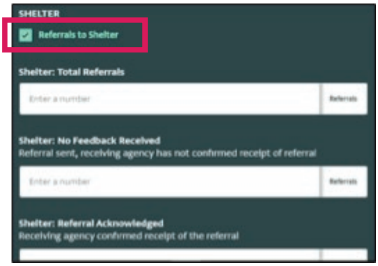
You will need to fill a new form for each governorate.

5. Click on the sector you want to report referrals to. Enter the total number of referrals made to this sector within the governorate in the past 3 months.

6.Dissagregate the total number of referrals made by their status at the end of the reporting period. (31 March for Q1). There are 4 types of referral status;

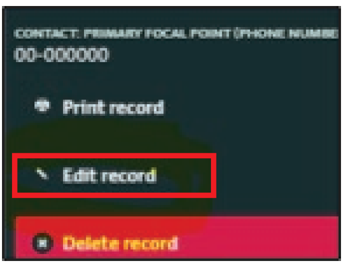
- No Feedback Received
- Referral Acknowledged
- Referral Accepted
- Referral Not Accepted

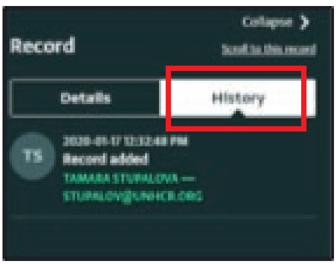
You should verify the numbers are correct: "Total referrals to Shelter" should be the sum total of the breakdown you have provided under distinct status categories, i.e. 'No feedback received' + 'Referral acknowledged' + 'Referral accepted' + 'Referral not accepted' = 'Protection: Total referrals'.



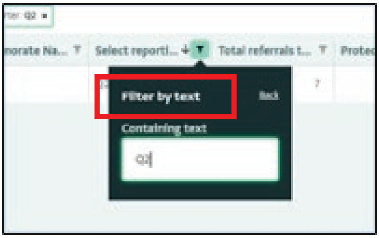
7. Once complete for all sectors within the specific governorate, click 'Save record' Repeat this process for the other governorates.

8. Once saved, you can amend any record you make by clicking your input, which will open up a menu on the right hand side. Scroll down and select 'edit record'. You can also click on any record, to track who has edited this record and when, under the 'history' tab.





9. You can use the “filter” buttons to filter for a specific quarter or a governorate, for example:

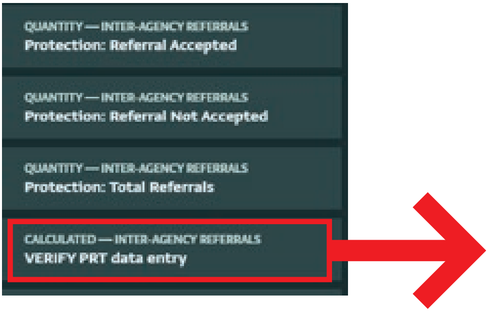


DATA VERIFICATION

As mentioned, the ‘Total referrals to Shelter’ should be the sum total of the breakdown you have provided under distinct status categories, i.e. ‘No feedback received’ + ‘Referral acknowledged’ + ‘Referral accepted’ + ‘Referral not accepted’ = ‘Protection: Total referrals’

1. You can verify if you have done your data entry correctly in the following way:
2. Go to “Select columns” on the top bar

3. And drag the “Verify PRT data entry” tab from “Available columns” the right hand side (“Selected columns”). It will now appear in your database view.



4. You will know that you have entered your data correctly if the status under this column says “correct”.

5. In case it says “incorrect”, please go back to edit your record (using the “edit record” button) to ensure that your sum totals for each sector add up.