One Stop Service Tracking

Module 7: Reporting

Introduction to Module 7: Management Reporting

OSST includes access to management reports that can be used to view caseload and case information for regions throughout the State of Florida. NOTE: Information contained in OSST management reports is delayed by one calendar day.

Management reports can be accessed via the Control Panel by clicking the Reporting hyperlink. This action takes you to the Report Selection page where you can identify which of the available reports you would like to view. Upon selecting a report to view, the Selection Criteria page appears where you can identify the specific criteria to include in the report. Examples include viewing a report for a specific or all regions, viewing a report by one or all units within the selected region, identifying how you would like to sort the report (specific to each report's definition) and other criteria as applicable to the selected report. Upon completing the selection criteria for the selected report, the report is generated.

One of the key features of the management reports in OSST is that you can navigate to lower and higher levels of detail as necessary to gain an understanding of the statewide results all the way down to the career manager level in many reports. For example the Caseload Program Types report indicates the types of cases (Single Parent, Teen Parent, Two Parent, Applicant, Transitional and Total cases) currently open or closed for the state, each region, each unit or for a specific career manager. The drill down capability allows you, in some cases, to enter the caseload of a career manager and actually view and update cases where your security profile allows access to the cases. This makes the tool not only useful for reporting counts, but also enables a career manager to perform case management functions.

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Module 7: Reporting

At the end of this module, you will be able to:

- ✓ **Make a Report Selection**
- ✓ **Select Report Criteria**
- ✓ **Drill Down to a lower level of detail within a report**
- ✓ **Drill Up to a higher level of detail within a report**

Below is a list of the reports you have access to, including a brief description and their level of detail. From this list, we will use one report to demonstrate the management reporting functionality within OSST. Later, we will allow you to choose your own report and practice using the reporting function within OSST.

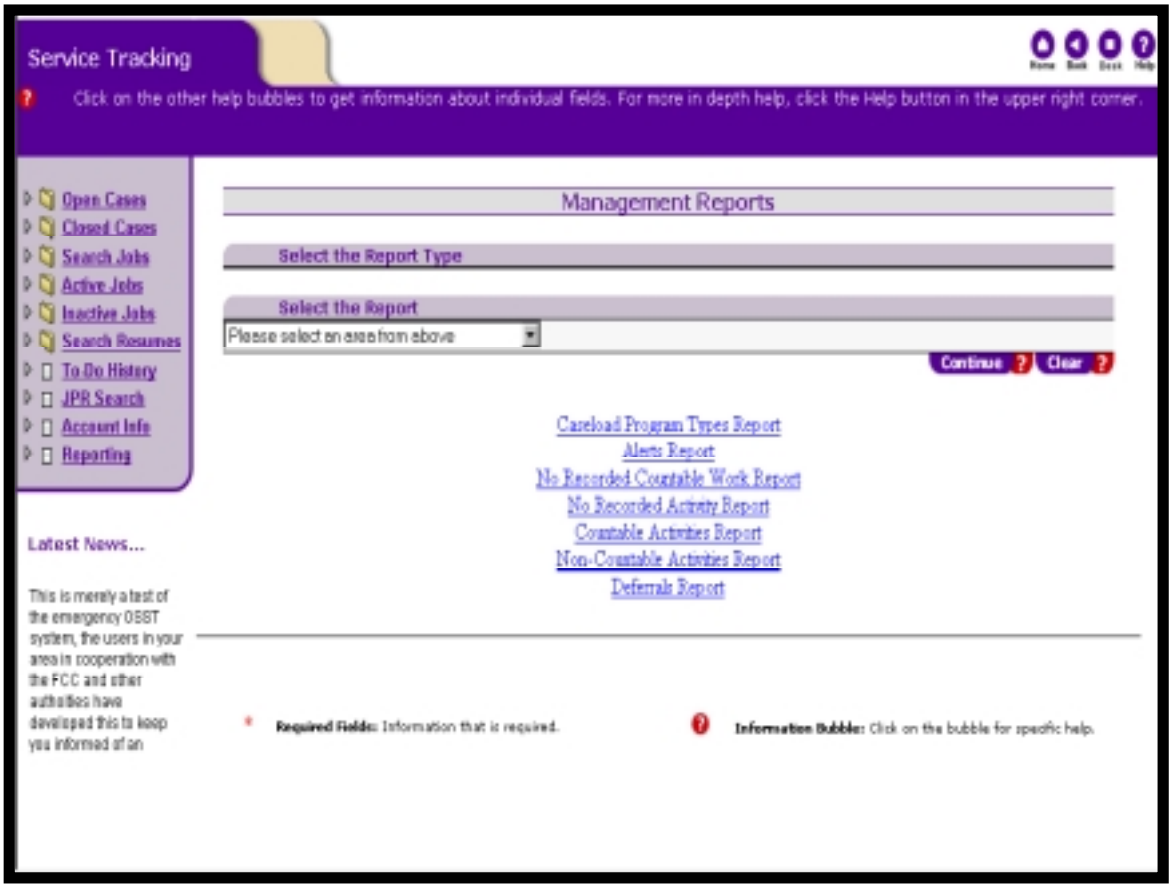
Report #	Report Name	Report Description	Level
1a	Caseload Program Types Report	Displays the number of open cases, by case type	By Region
1b	Caseload Program Types Report	Displays the number of open cases, by case type	By Unit
1c	Caseload Program Types Report	Displays the number of open cases, by case type	By Career Manager
1d	Caseload Program Types Report	Displays the number of open cases, by case type	By Case
2a	To-Do Report	Displays the number of To-Dos, by type	By Region

Report #	Report Name	Report Description	Level
2b	To-Do Report	Displays the number of To-Dos, by type	By Unit
2c	To-Do Report	Displays the number of To-Dos, by type	By Career Manager
3a	Open Cases with No Recorded Countable Activities Report	Counts number of customers not currently assigned to a **countable** activity	By Region
3b	No Recorded Countable Activities Report	Counts number of customers not currently assigned to a **countable** activity	By Unit
3c	No Recorded Countable Activities Report	Counts number of customers not currently assigned to a **countable** activity	By Career Manager
3d	No Recorded Countable Activities Report	Counts number of customers not currently assigned to a **countable** activity	By Case
4a	No Recorded Activity Report	Displays the number of customers who have no activities (countable or not)	By Region
4b	No Recorded Activity Report	Displays the number of customers who have no activities (countable or not)	By Unit
4c	No Recorded Activity Report	Displays the number of customers who have no activities (countable or not)	By Career Manager
4d	No Recorded Activity Report	Displays the number of customers who have no activities (countable or not)	By Case
5a	Countable Report	Displays the number of customers participating in each of the countable activities	By Region
5b	Countable Report	Displays the number of customers participating in each of the countable activities	By Unit

Report #	Report Name	Report Description	Level
5c	Countable Report	Displays the number of customers participating in each of the countable activities	By Career Manager
6a	Non-Countable Report	Displays the number of customers participating in each of the non-countable activities, by type	By Region
6b	Non-Countable Report	Displays the number of customers participating in each of the non-countable activities, by type	By Unit
6c	Non-Countable Report	Displays the number of customers participating in each of the non-countable activities, by type	By Career Manager
7a	Deferrals Report	Counts number of customers that are currently deferred, by type of deferral	By Region
7b	Deferrals Report	Counts number of customers that are currently deferred, by type of deferral	By Unit
7c	Deferrals Report	Counts number of customers that are currently deferred, by type of deferral	By Career Manager
7d	Deferrals Report	Counts number of customers that are currently deferred, by type of deferral	By Case

Example Management Report- Caseload Program Types Report

Let's work through an example report to demonstrate the functionality of management reporting in OSST. The example is the 'Caseload Program Types' report. This report indicates the types of cases (Single Parent, Teen Parent, Two Parent, Applicant, Transitional and Total cases) currently open or closed across the State, each Region, each Unit or for a specific Career Manager. **Note:** OSST management reports only include information associated with converted regions. All regions are anticipated to be converted by September, 2001.



Associated Procedures:

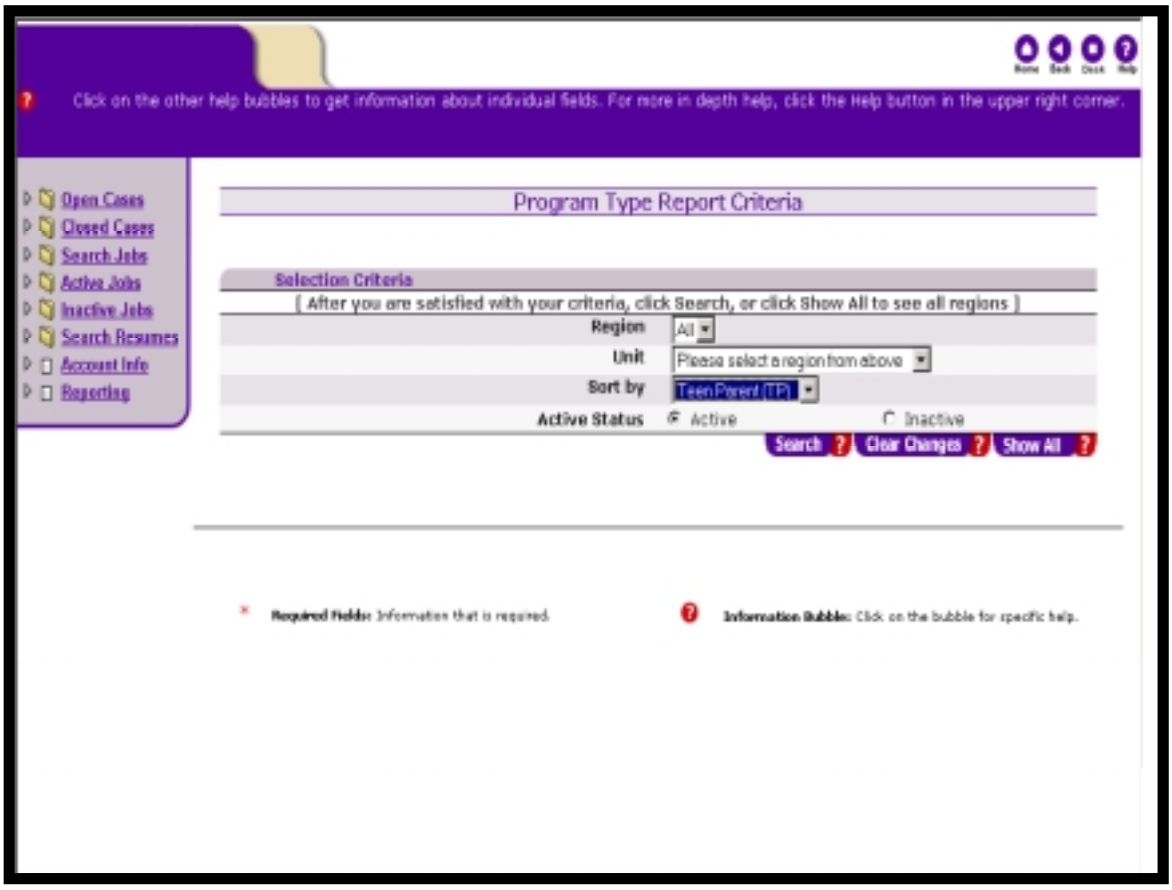
I. Selecting a Report

CLICK the Reporting hyperlink on the Control Panel

SELECT the desired Report from the drop down list box

CLICK 'Continue'

Completing the procedures above determines the selection criteria available for viewing the report. Selection criteria are the parameters you define for OSST so that the most relevant view of the report is presented. For example, you may want to see all open cases by type only for the region you serve. The selection criteria allows you to define the report to this level of detail. Using selection criteria is recommended because it decreases system processing time and the most relevant view for your use will be presented, meaning you can better understand the information when the context of the report is defined specifically.



When selecting criteria for the desired report, you have some decisions to make. You may decide that you would like to see all regions' report results. From there you may drill down and drill up to different levels of detail; or you may want to view the results of one region and all or one unit within that region, skipping over the results of all regions. The 'Report Criteria' page is where these decisions are made. Again, criteria selections are dependent upon the selected report.

For this example we will choose to view all regions in order to demonstrate the report's drill down and drill up capabilities.

Associated Procedures:

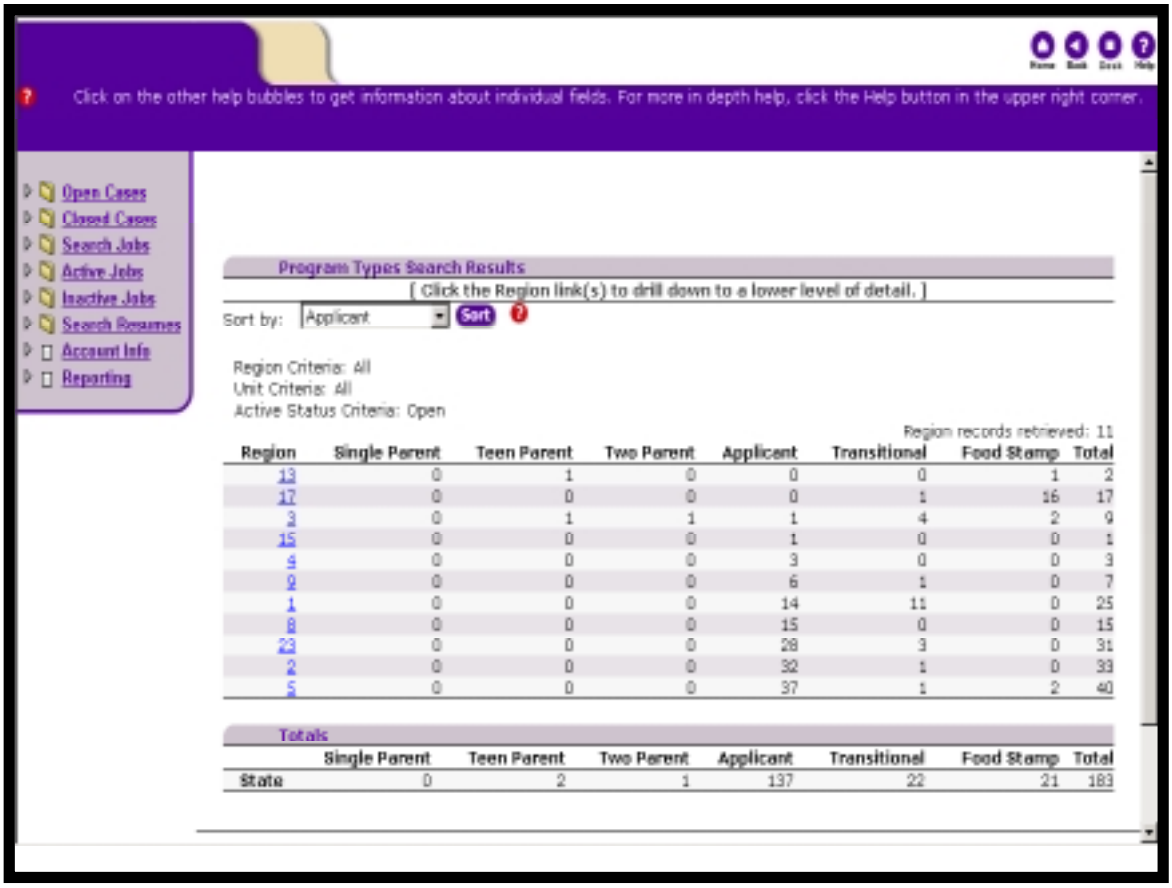
II. Selecting Criteria For the Report

SELECT 'All' from the Region drop down list (since we want to see all regions' results, no 'Unit' criteria selection is necessary)

SELECT a 'Sort by' criteria from the drop down list

SELECT 'Active Status' criteria (Active or Inactive) - this refers to the open caseload (active) and closed caseload (inactive)

CLICK ‘Search’

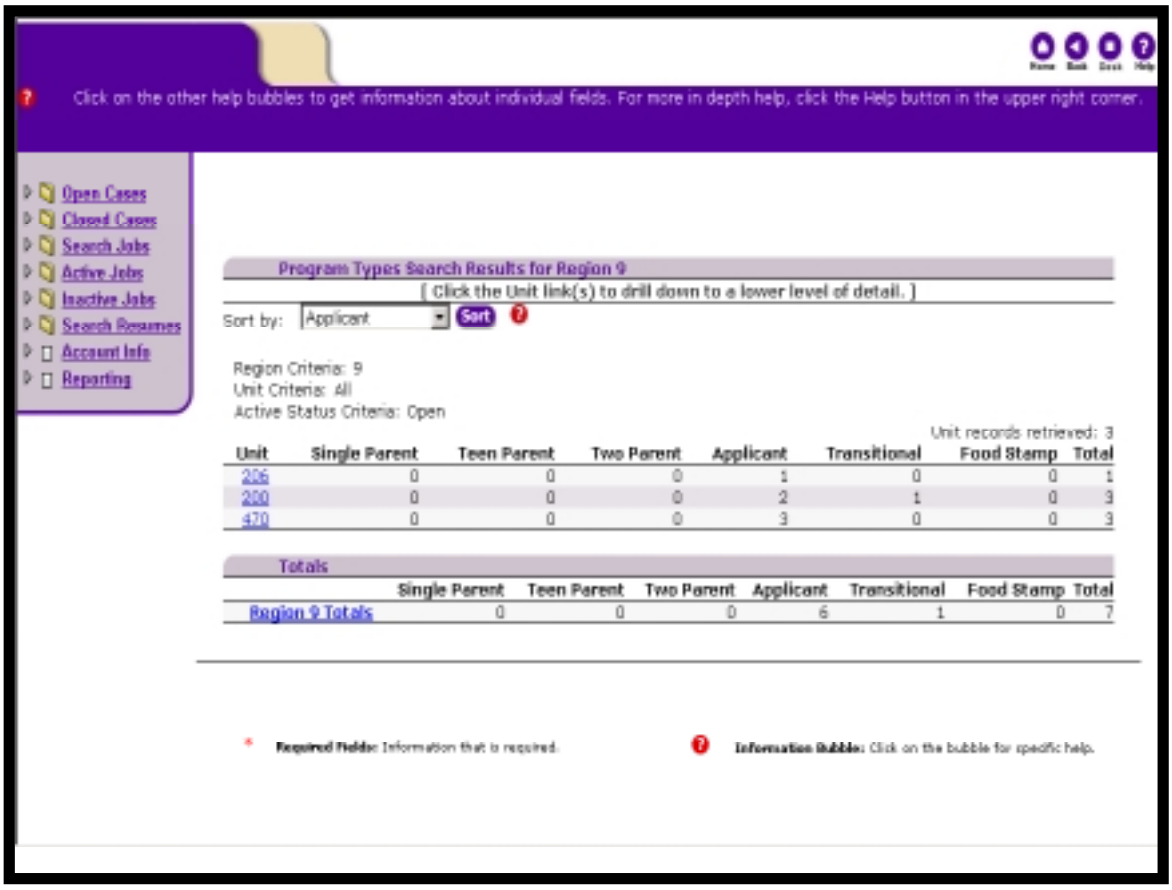


From this view of the report you may drill down to a specific region. The only drill up capability in this example is the 'State' information provided at the bottom of the page. This information allows you to see how a specific region's statistics compares to the overall state's statistics.

Associated Procedures:

III. Drill Down to a Specific Region's Report

CLICK on the desired region number in order to view that region's report



From here you may drill down to view a specific unit's report. This page also provides a drill up option in order to view all the region's information again. This capability allows you to compare your region with all of the region's information.

Associated Procedures:

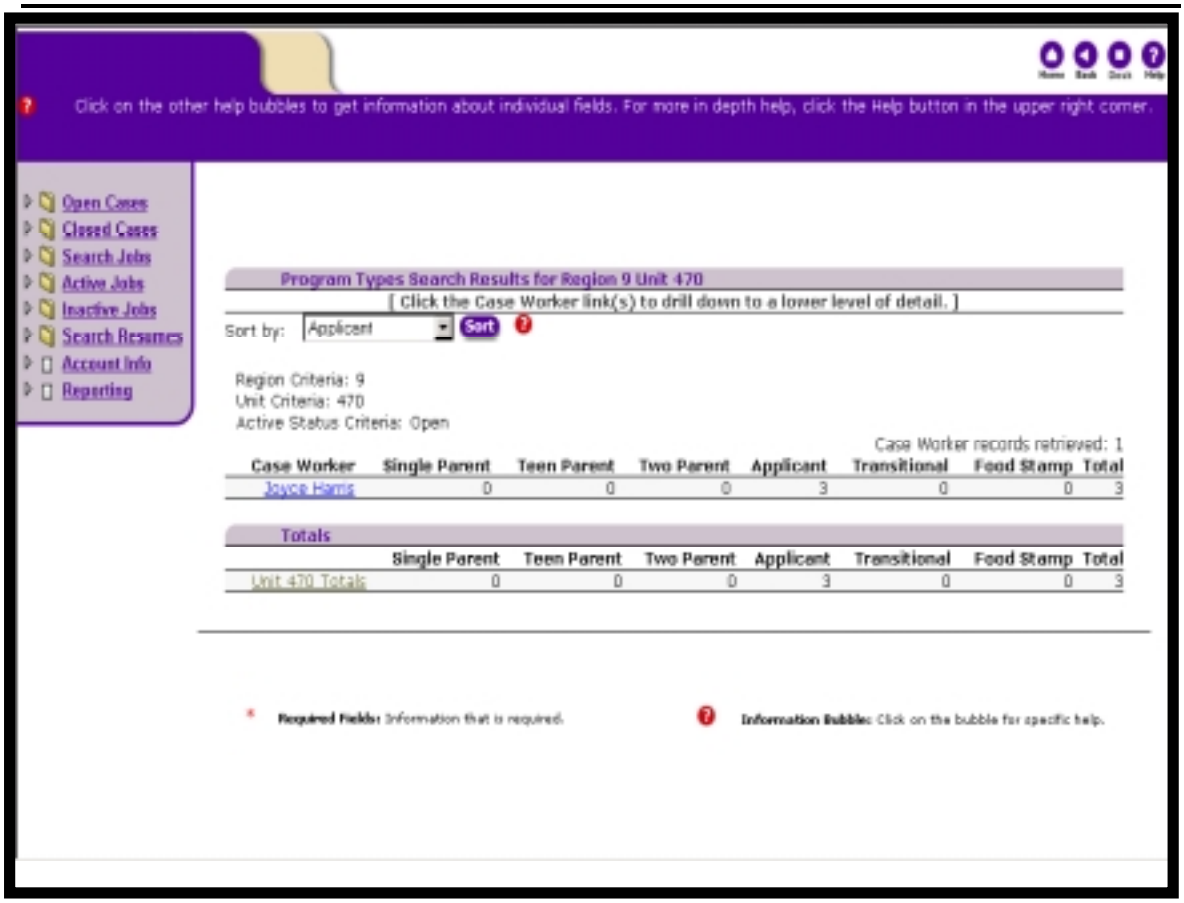
I. Drill Down to Specific Unit's Report:

CLICK on the desired unit number in order to view that unit's report

Associated Procedures:

II. Drill Up to all Regions Report:

CLICK on the 'Region' hyperlink under the 'Totals' section of the page (brings you back to the report for all regions)



From here you may drill down to view a specific career manager's caseload. You may also drill back up to the unit level report, which displays all the units within the selected region. This allows you to compare your unit's information with the information of other unit's within the region.

Associated Procedures:

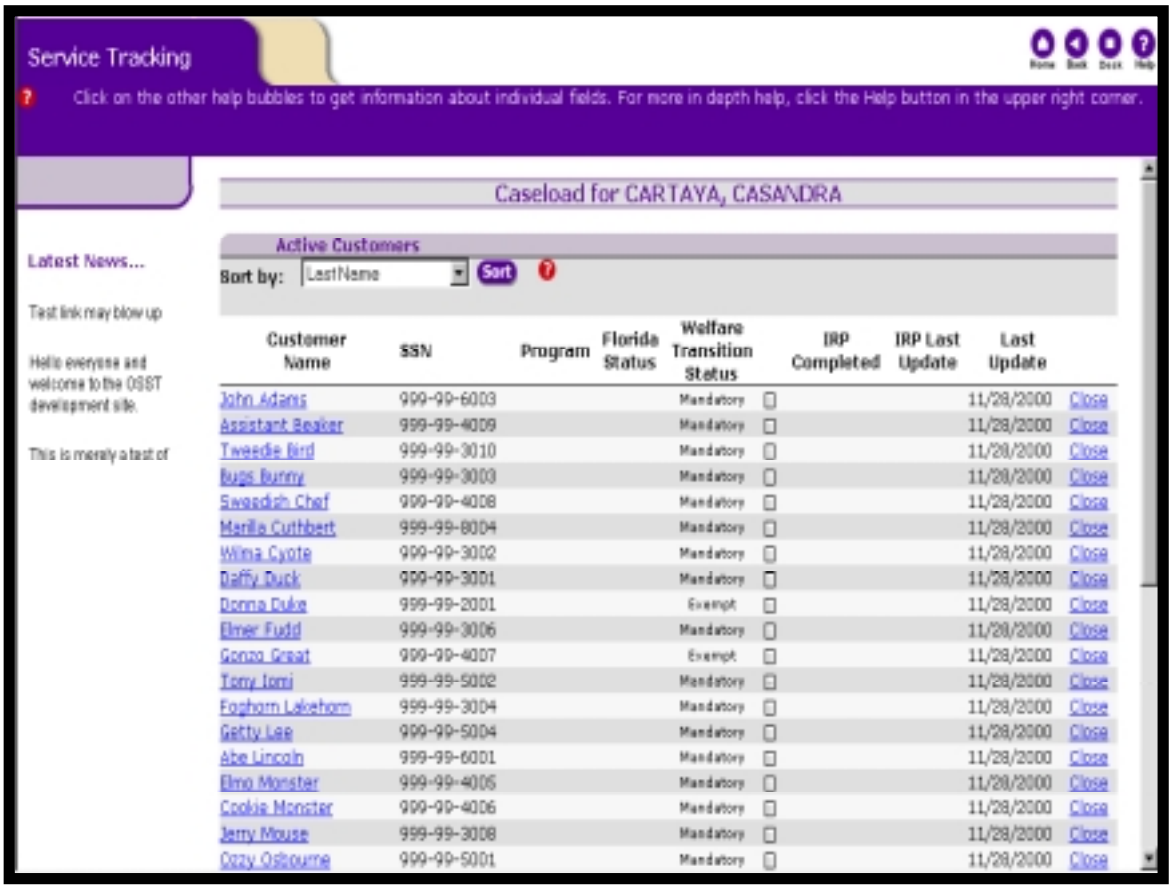
I. Drill Down to a Specific Career Manager's Caseload:

CLICK on the career manager's name in order to view their caseload

Associated Procedures:

II. Drill Up to the Unit level Report:

CLICK on the 'Unit' hyperlink under the 'Totals' section of the page (brings you back to the unit level report within the selected region)



After clicking on the selected career manager, you may now view their caseload. From here you now have the ability to perform case management functions if you have the appropriate security rights within the caseload you are viewing.

Activity:

From your OSST Desktop practice navigating to the management reporting area, selecting a report, identifying selection criteria and experimenting with the drill down/up capabilities provided.

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Questions?