ART Gallery Report 0404
Client Case Plans
Case Management Report

EXECUTIVE SUMMARY:
This report is designed to allow users to view multiple clients and their respective case plans at once. The Case Plan document displays goals, action steps, and case notes with full details as well as a history of the client's program enrollment, caseworkers, and infractions. The Case Plan document is designed to allow batch printing with each client's plan beginning on a new page. Drill filters allow the user to limit the report to a single client or to the clients of a specific caseworker. Additional Tabs include a case note – only display, a goal analysis tab and case plan statistics.

AUDIENCE:
Case Managers, Agency Administrators, and other users who frequently review client records.

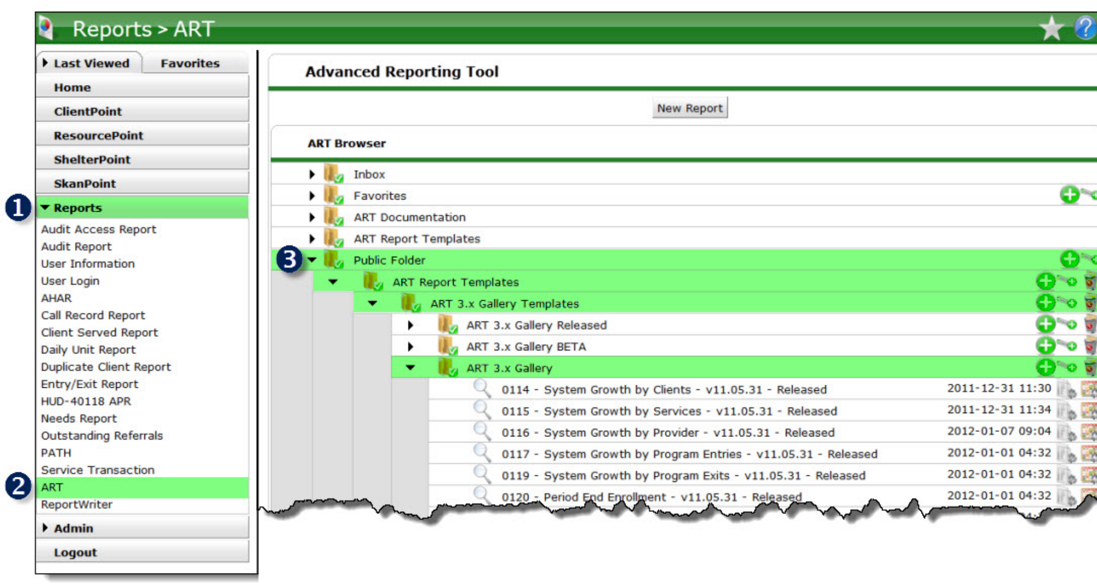
FREQUENCY:
The report should be run on a weekly or monthly basis to ensure optimal quality.

PURPOSE:
To facilitate case plan review and/or printing for client's case file.

INSTRUCTIONS:

The easiest way to start using this report is to navigate to the automapper. This is a folder that has the reports automatically mapped to your site, so that you don't have to map them yourself. You can navigate to the automapper as shown below:

Figure 2.1: Location of Automapped Reports



Requests for additional information concerning the report function/design should be directed to Bowman Systems' Customer Support Specialist (CSS) staff.

Before running the report: Prior to running the report the user must determined the provider to be included in the report and how far back in time to go with regard to record inclusion.

How to run:
Upon opening the report, the user will be prompted (see Diagram 1) to specify parameters which control the data returned by the report. Once the user has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The user should then single-click the "Run Query" button to generate the report.

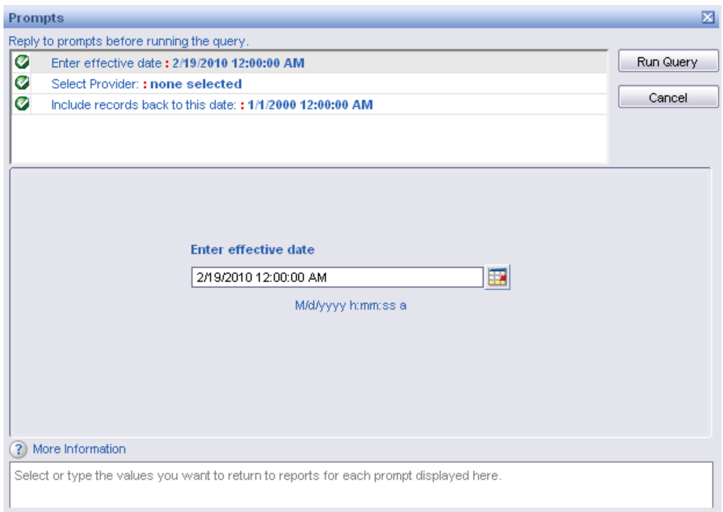


Diagram 1

The three user prompts contained in this report are:

1. **Enter Effective Date:** The user should enter (or select from the calendar) the current date (or a historical date if historical data is desired). The value selected is retained as the default for the next time the report is run.
2. **Select Provider:** Click the "refresh list" icon and wait for the left window to refresh. Now select the provider to include by highlighting them in the left window and moving them into the right window using the right selection arrow.
3. **Include records back to this date:** This user response defaults to 1/1/2000 so that all records will be included. If there is a desire to see recent records only, a more recent date can be entered (or selected from the calendar).

How to read: The report contains five tabs. Each tab is a separate sub-report containing three sections:

- **Report Header:** The header contains the title of the report, and specifies any date parameters. When running the report in "modify" view, the report header is only visible in print/page layout mode.

- **Report Footer:** The report footer contains the title of the report, the name of the sub-report, the page number, the version number, and the date/time the report was run /printed. Like the header, the footer is only visible in print mode when the report is run in modify view.
- **Report Body:** The report body is the main section of the report located between the header and the footer where the reports data is displayed in a variety of different chart and graph formats. The data contained in each of the tabs in this report is displayed and described below:

Client Case Plans

Case Plan Document

Effective date of report: 2/19/10
Records back to: 1/1/00

Test , Just # 339800

Date of Birth :	1/7/83
Current Age :	27
Soc Sec # :	311-69-5309
Currently Enrolled :	Yes

Caseworker History

Larry Jones	1/1/2010	to	present
Bob Smith	3/24/2009	to	12/31/2009
Test Caseworker	12/1/2008	to	8/1/2009

Enrollment History

Bowman Consulting Group(2)	8/21/2009	to	present
Bowman Consulting Group(2)	1/29/2009	to	3/24/2010
Bowman Consulting Group(2)	11/1/2008	to	1/24/2009

Infraction History

Theft	BANNED:	10/19/09	to	12/19/2009
Destruction of Property	BANNED:	3/14/08	to	3/21/2008

Goal Date Set: 1/24/10

Classification	Goal Type	Target Date	Status	Outcome	Outcome Date
Financial Stability	Improve Credit Rating	6/1/2010	Identified		

Actionsteps:

Date Set	Description	Status	Outcome	Outcome Date
1/24/2010	Pay 100$/month extra in Master Card bill.	Identified		
1/24/2010	Pay 25$/month extra on Visa bill.	Identified		
1/24/2010	Set aside $10/week for emergency fund.	Identified		
1/24/2010	Use HPRP funds to restore utility services	Closed	Achieved	1/24/2010

Casenotes:

Created on 1/24/10 by Herm DeGroot(2323) and last updated on 1/24/10 by Herm DeGroot(2323)	1/24/10: On 1/24/2010 Client agreed to pay down credit card debt and to begin a rainy day savings account. Bowman Systems will use HPRP funds to get utility services restored. (see action steps) PS 1/24/2010- Utility restoration to include telephone service.

Goal Date Set: 5/1/09

Classification	Goal Type	Target Date	Status	Outcome	Outcome Date
Health Improvement	Gain Access to Regular Health Care	8/1/2009	Closed	Abandoned	7/13/2009

Actionsteps:

Date Set	Description	Status	Outcome	Outcome Date
6/19/2009	applied to Carefirst BlueCross, Humana, Kaiser, Aetna, United Healthcare, MHIP.	Closed	Achieved	6/19/2009

Casenotes:

Bowman Systems
0404 - Client Case Plans
Tab A - Case Plan Document
Page 2 of 3
v10.02.19
Printed: 2/22/10
1:13:03 PM

Diagram 2

Tab A – Case Plan Document (Diagram 2): This tab contains a printable version of the client case plan sectioned by client, so that each client's plan will start on a new page. In order for a client to be included, they must have at least one program entry and at least one recorded goal by the specified provider and during the specified time period of the report. Four drill filters are included which allow the user to easily limit the report to a specific client (by name or by number) or to a specific caseload (by current caseworker or by previous caseworker). The Case Plan Document includes the following elements:

- Client identifying data: Name, SS#, Client Uid
- Date of Birth and Current Age
- Current enrollment status
- Casework history
- Program enrollment history
- Infraction/suspension history
- Goals with detail sorted by date set
    - Related action steps with detail
    - Related case notes with detail

Client Case Plans

Casenotes Only

Effective date of report: 2/19/10
Records back to: 1/1/00

Test , Just # 339800

Casenote Provider: Bowman Consulting Group(2)

Casenote User	Casenote Date	Casenote Note
Created on 1/24/10 by Herm DeGroot(2323) and last updated on 1/24/10 by Herm DeGroot(2323)	1/24/2010	On 1/24/2010 Client agreed to pay down credit card debt and to begin a rainy day savings account. Bowman Systems will use HPRP funds to get utility services restored. (see action steps) PS 1/24/2010- Utility restoration to include telephone service.
Created on 1/15/10 by Steven Millard(2330)	6/10/2009	Client having difficulty getting health insurance due to pre-existing conditions. However, client does not qualify for Medicare or Medicaid.
Created on 1/15/10 by Steven Millard(2330) and last updated on 1/24/10 by Herm DeGroot(2323)	2/20/2009	Client called to say they took the test and are awaiting the results. Called back later that day to say that that he had passed.

Diagram 3

Tab B – Case Notes only (Diagram 3): This tab contains only the case notes and their detail. The primary use of this tab is for printing case note updates for the clients' file. As in tab A, this report is sectioned by client with each printing on a separate page. Case notes are shown in descending date order.

Client Case Plans

Goal Totals

Effective date of report: 2/19/10
Records back to: 1/1/00

Goal Provider: Aps Cqudgluir Nklp Wa Hkccvn(2061)

Total Goal Record Count	Total Client Count
677	361

Goal Classification	Goal Type	Goal Status	Goal Outcome	Goal Record Count	Client Count
Employment	Get A Job	Closed	Abandoned	119	88
Employment	Get A Job	Closed	Achieved	49	44
Employment	Get A Job	Closed	No Outcome Selected	4	4
Employment	Get A Job	Closed	Partially achieved	6	6
Employment	Get A Job	Closed	Revised	59	52
Employment	Get A Job	Identified	Not Applicable	36	34
Employment	Get A Job	In Progress	Not Applicable	7	7
Employment	Get A Job	In Progress	Partially achieved	2	2
Employment	Get A Promotion	Closed	Abandoned	1	1
Employment	Maintain A Job	Closed	Abandoned	1	1
Employment	Maintain A Job	Closed	Partially achieved	1	1
Employment	Maintain A Job	In Progress	Not Applicable	1	1
Employment	Other	Closed	Abandoned	7	7
Employment	Other	Closed	Achieved	14	14
Employment	Other	Closed	Partially achieved	1	1
Employment	Other	Closed	Revised	3	3
Employment	Other	Identified	Not Applicable	3	3
Employment	Other	In Progress	Not Applicable	3	3
Financial Stability	Obtain Public Benefits	In Progress	Not Applicable	1	1

Diagram 4

Tab C – Goal Totals (Diagram 4): This tab consists of a box showing the client and goal totals, and a table which displays goal detail listed by classification, type, status, and outcome, with goal counts and client counts for the various combinations. Drill filters are provided which allow the user to perform analysis by focusing the results on a single classification, type, status, outcome, or combination of these. Note: Goal outcomes are reported only when the goal status is "closed" If the goal status is "Identified" or "In Progress", the outcome for that goal is displayed as "not applicable" in green font. If there was no outcome specified for a "closed" goal the outcome is displayed as "No Outcome Selected" in red font.

Case Plans Report

Statistics

Effective date of report: 2/19/10

Records back to: 1/1/00

Provider: **Aps Cqudgluir Nklp Wa Hkccvn(2061)**

Record Type	Record Count	Client Count	Percentage of Clients with Records
Goals	677	361	100.00%
Casenotes	5,034	336	93.07%
Actionsteps	2	1	0.28%
Caseworkers	4	4	1.11%
Infractions	1	1	0.28%

Diagram 5

Tab C – Statistics (Diagram 5): This tab consists of a table which displays count data for goal case notes, action steps, caseworkers, and infractions, in addition to the counts of these various elements, the table also show the number and percentage of clients for whom these various elements are applicable.

Case Plans Report

Additional Information

Effective date of report: 2/19/10

Records back to: 1/1/00

User Prompt Field	Value(s) Selected
Enter Effective Date:	2/19/10
Include records back to this date:	1/1/00
Select Provider:	Aps Cqudgluir Nklp Wa Hkccvn(2061)

Providers Reporting Information	Unduplicated Client Count
Aps Cqudgluir Nklp Wa Hkccvn(2061)	361

Bowman Systems
333 Texas Street, 300
Shreveport, LA 71101
Toll Free: (888) 580-3831
Direct: (318) 213-8780
Fax: (318) 213-8784
Email:ART_Reports@BowmanSystems.com
http://www.bowmansystems.com

Diagram 6

Tab E – Additional Information (Diagram 6): This tab is provided as a reference to the user running the report and lists the parameters specified in the user prompts, as well as the number of clients included in the report.

REPORT MODIFICATION

Users with ad-hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an ART Gallery report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the "save as" feature or by clicking on the "organize" icon in folder view.

NOTE: The original un-modified version of this report is a template and is retained in ART Gallery Templates folder structure. These template folders are read-only and any reports must be copied to a location in the user's site (Favorites or Public Folders) then mapped to the site's data.

Variations of this report can be created using the input control filters described below, however users may wish to make versions of this report for monitoring activity for a specific combination of parameters. Such variations can be easily and quickly accomplished by adding simple "equal to" or "in list" type filters to the appropriate field(s) in the "data" query.

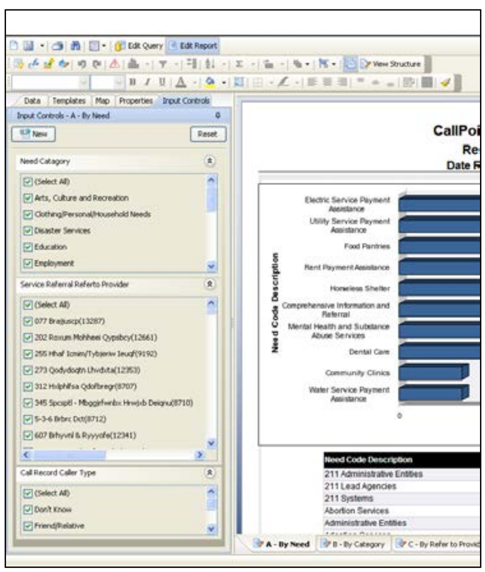


Diagram 7

INPUT CONTROLS

This report has been equipped with input control filters to allow both ad-hoc and viewer license users to easily filter the report results to a specific parameter or a combination of parameters. When the report finishes running the input control options will appear in the left hand window of the screen (See Diagram # 6). Input controls can be used individually or in combination to customize the report to the users reporting needs. Ad-hoc users can add additional input controls by first adding fields to the query results objects and then to the input control screen. This flexibility is a new feature of ART 3.0 and greatly enhances the report flexibility and usefulness.

Input controls are specific to the report tab on which they appear. Input control filters contained in this report are listed below:

Tab A – Results

- Client Uid
- Client Full Name
- Current Caseworker
- Prior Caseworker
- Goal Classification
- Goal Type
- Goal Status

Tab B – Casenotes Only

- Client Uid
- Client Full Name
- Current Caseworker
- Prior Caseworker
- Goal Classification
- Goal Type
- Goal Status

Tab C – Goal Totals

- Client Uid
- Client Full Name
- Current Caseworker
- Prior Caseworker
- Goal Classification
- Goal Type
- Goal Status

Tab D – Statistics

- Client Uid
- Client Full Name
- Current Caseworker
- Prior Caseworker
- Goal Classification
- Goal Type
- Goal Status

Tab E – Additional Information

- Client Uid
- Client Full Name
- Current Caseworker
- Prior Caseworker
- Goal Classification
- Goal Type
- Goal Status

MAPPING OBJECTS

UNIVERSE: template_u)]

This report is mapped to the client universe ([template_u)]) and should be copied to your Public or Favorite folder then mapped to the equivalent client universe for your site (ex. *yoursite_ u*).

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
BISdata	Client Uid	Location: Clients Type: System Field Use: Result Objects
	Client Unique Id	Location: Clients Type: System Field Use: Result Objects
	Date of Birth (893)	Location: Clients Type: System Field Use: Result Objects
	Age (Calculated)	Location: Clients Type: System Field Use: Result Objects
	Client Soc Sec No Dashed	Location: Clients Type: System Field Use: Result Objects
	Client First Name	Location: Clients Type: System Field Use: Result Objects
	Client Last Name	Location: Clients Type: System Field Use: Result Objects
	Client Inactive	Location: Clients Type: System Field Use: Sub-Query Filter/Result Objects
	Entry Exit Uid	Location: Entry Exit (Outer) Type: System Field Use: Sub-Query Filter
	Entry Exit Inactive	Location: Entry Exit (Outer) Type: System Field Use: Sub-Query Filter
	Entry Exit Provider Id	Location: Entry Exit (Outer) Type: System Field Use: Sub-Query Filter/Result Objects
	Entry Exit Entry Date	Location: Entry Exit (Outer) Type: System Field Use: Sub-Query Filter/Result Objects
	Entry Exit Exit Date	Location: Entry Exit (Outer) Type: System Field Use: Result Objects
	Goal Uid	Location: Goals Type: System Field Use: Sub-Query Filter/Result Objects

	Goal Inactive	Location: Goals Type: System Field Use: Sub-Query Filter/Result Objects
	Goal Date Set	Location: Goals Type: System Field Use: Sub-Query Filter/Result Objects
	Goal Provider	Location: Goals Type: System Field Use: Sub-Query Filter/Result Objects
	Goal Date Added	Location: Goals Type: System Field Use: Result Objects
	Goal User Updating	Location: Goals Type: System Field Use: Result Objects
	Goal Classification	Location: Goals Type: System Field Use: Result Objects
	Goal Type	Location: Goals Type: System Field Use: Result Objects
	Goal Status	Location: Goals Type: System Field Use: Result Objects
	Goal Outcome	Location: Goals Type: System Field Use: Result Objects
	Goal Date Updated	Location: Goals Type: System Field Use: Result Objects
	Goal Outcome Date	Location: Goals Type: System Field Use: Result Objects
	Actionstep Uid	Location: Actionsteps Type: System Field Use: Sub-Query Filter/Result Objects
	Actionstep Inactive	Location: Actionsteps Type: System Field Use: Sub-Query Filter/Result Objects
	Actionstep Provider	Location: Actionsteps Type: System Field Use: Sub-Query Filter
	Actionstep Date Set	Location: Actionsteps Type: System Field Use: Result Objects
	Actionstep Status	Location: Actionsteps Type: System Field Use: Result Objects

	Actionstep Outcome	Location: Actionsteps Type: System Field Use: Result Objects
	Actionstep Outcome Date	Location: Actionsteps Type: System Field Use: Result Objects
	Actionstep Description	Location: Actionsteps Type: System Field Use: Result Objects
	Casenote Uid	Location: Casenotes Type: System Field Use: Sub-Query Filter/Result Objects
	Casenote Inactive	Location: Casenotes Type: System Field Use: Sub-Query Filter/Result Objects
	Casenote Provider	Location: Casenotes Type: System Field Use: Sub-Query Filter/Result Objects
	Casenote Date Added	Location: Casenotes Type: System Field Use: Result Objects
	Casenote Date Updated	Location: Casenotes Type: System Field Use: Result Objects
	Casenote Note Date	Location: Casenotes Type: System Field Use: Result Objects
	Casenote Note	Location: Casenotes Type: System Field Use: Result Objects
	Casenote User Creating	Location: Casenotes Type: System Field Use: Result Objects
	Casenote User Updating	Location: Casenotes Type: System Field Use: Result Objects
	Case Worker Uid	Location: Case Workers Type: System Field Use: Sub-Query Filter/Result Objects
	Case Worker Inactive	Location: Case Workers Type: System Field Use: Sub-Query Filter/Result Objects
	Case Worker Provider	Location: Case Workers Type: System Field Use: Sub-Query Filter/Result Objects
	Case Worker Date Ended	Location: Case Workers Type: System Field Use: Sub-Query Filter/Result Objects

	Case Worker Date Started	Location: Case Workers Type: System Field Use: Result Objects
	Case Worker Name	Location: Case Workers Type: System Field Use: Result Objects
	Infraction Uid	Location: Infractions (Outer) Type: System Field Use: Sub-Query Filter/Result Objects
	Infraction Banned Start Date	Location: Infractions (Outer) Type: System Field Use: Sub-Query Filter/Result Objects
	Infraction Provider	Location: Infractions (Outer) Type: System Field Use: Sub-Query Filter/Result Objects
	Infraction Type	Location: Infractions (Outer) Type: System Field Use: Result Objects
	Infraction Banned End Date	Location: Infractions (Outer) Type: System Field Use: Result Objects

REVISION HISTORY:

Version	Description of Changes
V11.05.31	Original version –BETA
V2	Revision: Added version history; updated mapping information; correct data set to prevent clients from being excluded.