

Linking Data Systems: Ad Hoc Reports C-IV Counties



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Agenda

- **Introductions:**
- **Overview: What's Been Happening To Date**
- **Demonstration of Ad Hoc Reports: John Palm**
- **Humboldt County's Process: Rebecca Wissing**
- **Q & A/Discussion**
- **Next Steps:**

Linkages C-IV Counties

- El Dorado
- Imperial
- Humboldt
- Kern
- Madera
- Merced
- Siskiyou
- Stanislaus
- Tehama
- Trinity

What's Been Happening?

- Scott Pettygrove: Former Merced Deputy Director, working with Merced I.T. Staff
- Developed Ad Hoc Reports
- Explored SMART for C-IV
- Presentation at the July Convening
 - Powerpoint sent via email

John Palm, Staff Services Analyst Peer Advisor

- Demonstration of Ad Hoc Reports



Other C-IV County Ad-Hoc Reports

– Humboldt - Becky Wissing, Analyst

Humboldt County

Applications Used

- Microsoft Access
- Microsoft Excel
- C-IV – Crystal Reports
- CWS/CMS – Business Objects Report

Monthly SSN Match Cross Check

- Cross match of all CalWORKs children's SSN
 - Crystal Report exported to Excel

and Active CWS children's SSNs

– BO Report exported to Excel

Both lists are reviewed for matching SSNs.

Identified matches are highlighted

These identified children are checked for Linkages status in CWS and CalWORKs cases

Three Reports updated Weekly

- Active Cases
- Referrals Promoted to a Case (within last week)
- Linkages Special Project Code (including end date)

Saved to a shared drive for accessibility by the CalWORKs analyst for archiving

BO Reports (1 of 3)

Active Cases

- SSN
- Case Name
- DOB
- Primary Staff Phone
- Primary Staff Name
- Case ID Number
- Case Start Date
- Service Component
- Case Mother First and Last Name
- Case Special Project Name
- Project Start Date
- Project End Date

BO Reports (2 of 3)

Referrals Promoted to a Case (within last week)

- Referral Client SSN
- Referral Client Name
- Referral Client DOB
- Referral Received Date
- Referral Closure Date
- Referral Worker Last Name

BO Reports (3 of 3)

Linkages Special Project code (including end dated)

- Case Name
- Case ID Number
- Service Component
- Last Worker
- Last Supervisor
- Project Start Date
- Project End Date
- Mother's First and Last Name
- Father's First and Last Name
- Closure Reason

The CalWORKs program case management is assigned to one eligibility worker.

The previous mentioned reports are cross referenced with the caseload assigned to that eligibility worker.

Cases that have an open Special Project Code or a C-IV case flag are reviewed for Linkages status.

Workers are notified

Access Database

Database Fields

- Child's Name
- CWS Case Number
- SSN
- CIN
- DOB
- CalWorks Case Number
- WtW Case Name
- 2nd Parent
- Social Worker
- Social Worker Supervisor
- Employment and Training Worker
- Employment and Training Supervisor
- Linkages Start date
- Linkages End Date
- Linkages End Reason
- Comments (AB 429, 2-Parent Household, Cal-Learn, etc)
- WtW Case Status (Comments related to WtW Participation and WPR)

The Process

- Monthly SSN Match Cross Check to create the **Current Linkages Cases** Report- (CalWORKs Analyst cross references BO and Crystal Reports previously explained)
- **Current Linkages Cases** report is cross referenced with the caseload assigned to the CalWORKs eligibility worker.
- Any cases that are identified by an open Special Projects Code on an open C-IV Case Flag is reviewed for Linkages Status



Next Steps?

If more information needed or help in how to build reports:

- Call or email
 - Danna.Fabella@cfpic.org
 - jpalm@hsa.co.merced.ca.us
- Visit and meet one-on-one with John
- Information will be provided to the C-IV consortium

Follow Up: we'll email with...

- Copy of this PowerPoint
- Screen shots and information to be posted on Linkages Toolkit

Next Webinars

- September 4th 3 -4:30 pm: FM/CalWORKs
- October 2nd 9-10:30 am: ER/CalWORKs
- November 6th 3 -4:30 pm: Data CalWORKs
- December 4th 9 – 10:30 am: FR/CalWORKs

Reminder: <http://www.cfpic.org/toolkit/>