OCASE Reports – Client Support Services

Client Support Services & Exception Reports

OCASE reports are now available that will show the information you have entered for Client Support Services.

Report as it shows in OCASE	Who is recommended to use	Recommended frequency of use	Options	Benefits
Agency Support Exception Report	For Executive Director and Program Manager before preparing the OCHART report	Daily or weekly to identify data entry that is missing or incomplete	Shows Documents by type, Worker and Program Code during the selected date range	Data entry can be corrected/completed well before the reporting deadline
Agency Support Document Utilization Report	For Executive Director, Program Manager, other department heads and for everyone directly entering (creating) Client Support data Documents/Forms	Daily or weekly to ensure that service activity is entered into OCASE on a regular basis by each and everyone	View a summary or details by Document name, Worker created by, Program Code(s) or Service(s) – all or any combination of these in the selected date range	Gives you and your agency a good overview of which services, or which dates need the most resources due to service intensity
My Created Client Activity Report	For everyone directly entering (creating) Client Support data into OCASE Documents/Forms	Daily or weekly to ensure that your activity data is entered correctly and verified on a regular basis	Displays the information that you as worker have entered into the Documents/Forms. You can choose to view a summary or select some details as well	Useful to review all of the support work they have done for all clients during the selected date range
My Primary Worker Client Activity Report	For the Primary Worker to review their assigned Client Support activities entered by any other Worker	Daily or weekly to ensure that your client's activity data is entered correctly and verified on a regular basis	Displays the service activity and/or Case Notes for the client(s) where you are the Primary Worker, i.e. Your Case Load	Useful for one client assigned worker to have an overview of service history for their client(s)
Service File Client Activity Report	For any Worker who has permission to see the Agency Service/Program	Daily or weekly to ensure that this client's activity data is entered correctly and verified on a regular basis	Shows the services provided for the current client and can also show other service details including Case Notes	View with or without any one or more of the Case Notes, Referrals or Service Items
Service File Consent Report	For any Worker who has permission to see the Agency Service/Program	As needed to see a complete listing of the Added, Amended and Withdrawn consents. Can prompt you to add any records that may not be recorded	No selection options, a complete list is automatically displayed by default	Quickly see an inventory of signed consents that you have on file
Agency Client Activity Report	For Executive Director, Program Manager and other department heads	Daily or weekly to ensure that your agency's activity data is entered correctly and verified on a regular basis	Shows the services provided and can also show other service details including Case Notes, Referrals or Service Items	View with or without any one or more of the Case Notes, Referrals or Service Items

OCASE Reports – Client Support Services

Agency Support Exception Report:

Document Date: Date range (mm/dd/yyyy) – regularly viewing limits your need for wide date range*

Worker: blank = all (select name to limit results)

Program Codes: All or select 1 specific service (if codes used by your agency)

Report Options: All – use this (primarily shows details for the 2-Service Record document)

Starting from your Homepage, Click Reports on the Sidebar, click View All Reports, in the centre column under Service Reports area click "Agency Support Exception Report"

Agency Support Document Utilization Report:

Document Date: Date range (mm/dd/yyyy) – regularly viewing limits need for wide date range*

Worker Created By: blank = all (select name to limit results)

Service: All or select 1 specific service

Program Codes: All or select 1 specific service (if codes used by your agency)

Report Options: Details – included by default (uncheck to see without service details)

Starting from your Homepage, Click Reports on the Sidebar, click View All Reports, in the centre column under Service Reports area click "Agency Support Document Utilization Report"

Service File Client Activity Report:

Document Date: Date range (mm/dd/yyyy)*

Client Name: useful but not required here

Primary Worker: blank = all (select name to limit results)

Created By Worker: blank = all (select name to limit results)

Service: All or select 1 specific service

Program Codes: All or select 1 specific service (if used by your agency)

Report Options: Display none, one, two or all of – Service Items; Referrals; Case Notes

Starting from your client's Service File, Click Reports on the Sidebar, one of the links in that area will be "Service File Client Activity Report"

Service File Consent Report: - just click on the report name link

Document Date: Not shown

Activity Type: Not shown

Worker: Not shown

Report Options: Not shown

Starting from your client's Service File, Click Reports on the Sidebar, one of the links in that area will be "Service File Consent Report"

OCASE Reports – Client Support Services

My Created Client Activity Report:

Document Date: Date range (mm/dd/yyyy)*

Client Name: blank = all (select name to limit results)

Primary Worker: blank = all (select name to limit results)

Service: All or select 1 specific service

Program Codes: All or select 1 specific service (if used by your agency)

Report Options: Display none, one, two or all of – Service Items; Referrals; Case Notes

Starting from your Homepage, Click Reports on the Sidebar, one of the links in that area will be "My Created Client Activity Report"

My Primary Worker Client Activity Report:

Document Date: Date range (mm/dd/yyyy)*

Client Name: blank = all (select name to limit results)

Created By Worker: blank = all (select name to limit results)

Service: All or select 1 specific service

Program Codes: All or select 1 specific service (if used by your agency)

Report Options: Display none, one, two or all of – Service Items; Referrals; Case Notes

Starting from your Homepage, Click Reports on the Sidebar, one of the links in that area will be "My Primary Worker Client Activity Report"

Agency Client Activity Report:

Document Date: Date range (mm/dd/yyyy) – keep date range narrow for this agency report*

Client Name: blank = all (select name to limit results)

Primary Worker: blank = all (select name to limit results)

Created By Worker: blank = all (select name to limit results)

Service: All or select 1 specific service

Program Codes: All or select 1 specific service (if codes used by your agency)

Report Options: Display none, one, two or all of – Service Items; Referrals; Case Notes

Starting from your Homepage, Click Reports on the Sidebar, click View All Reports, in the centre column under Service Reports area click "Agency Client Activity Report"

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<u>*Limit the date range of the reports that are viewed (e.g. 3 months) for maximum OCASE performance</u>

These reports will show you all of you own 'created' data and the data for the agency within a selected date range. **It is important to review your Client Support Service reports on a routine basis, this means that you will have to set up a weekly or bi-weekly review system in your agency.** Ensure that job descriptions and schedules include time for data entry and review. This is important work for your agency and all service activity will need to be recorded by anyone providing services or those assigned to enter data in your agency.

Depending on a worker's in-agency work schedule, entering data on a regularly scheduled basis may only be possible weekly or bi-weekly. At the very least, enter data each month.

A report review process will enable you to make any necessary corrections and add missing or incomplete data – incorporate the use of the 'Agency Support Exception** Report'. Conducting routine reviews throughout the reporting period also enables you to have more time to prepare the funding reports, such as OCHART. The EBPU Dept. can provide support to you to develop procedures for reviewing your OCASE data.

Look at your Client Support Service reports to identify:

- Services delivered
- Case Notes
- Errors in data, (i.e. incomplete, or missing details)

All agencies using the Client Support Service Documents have experienced the same data entry problems or have similar questions:

- Don't forget to click the **plus button (+)** to add each data response to a 'composite' question (i.e. question with more than one response field)
- Click **Next** to continue to the next screen (even if it is a blank screen) and you must end by clicking **Finish**
- **Update** is a 'save-as-you-go' button — clicking this will save what you have already entered and allow you to continue entering information in the document. Make sure that you still click **Finish** at the very end. If you need to navigate away from your Document, go back and edit is later.

** Exceptions are errors in data entry, identifying records with missing or incomplete information