

CaseWorks Reports Training

CaseWorks Reports and Analysis

Today's Agenda

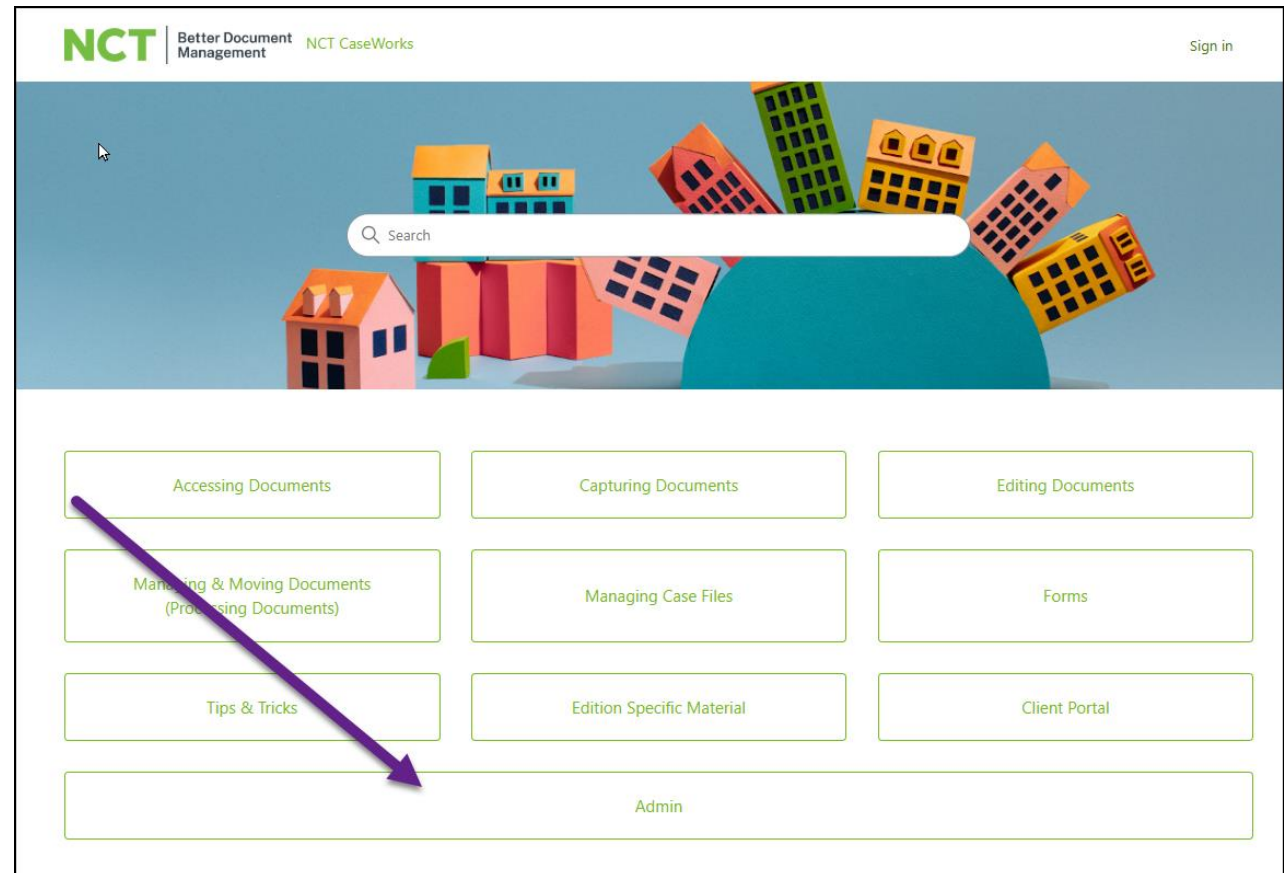
NCT

- Training Resources
- CaseWorks Reports Summary
- Prepping a Report
- Report Analysis

Training Resources

This Training will be recorded and available in the **CaseWorks Knowledge Base** (located in each CaseWorks Edition in the Left Navigation Panel)

Access the [CaseWorks Knowledge Base](#) and select the Admin section



Training Resources

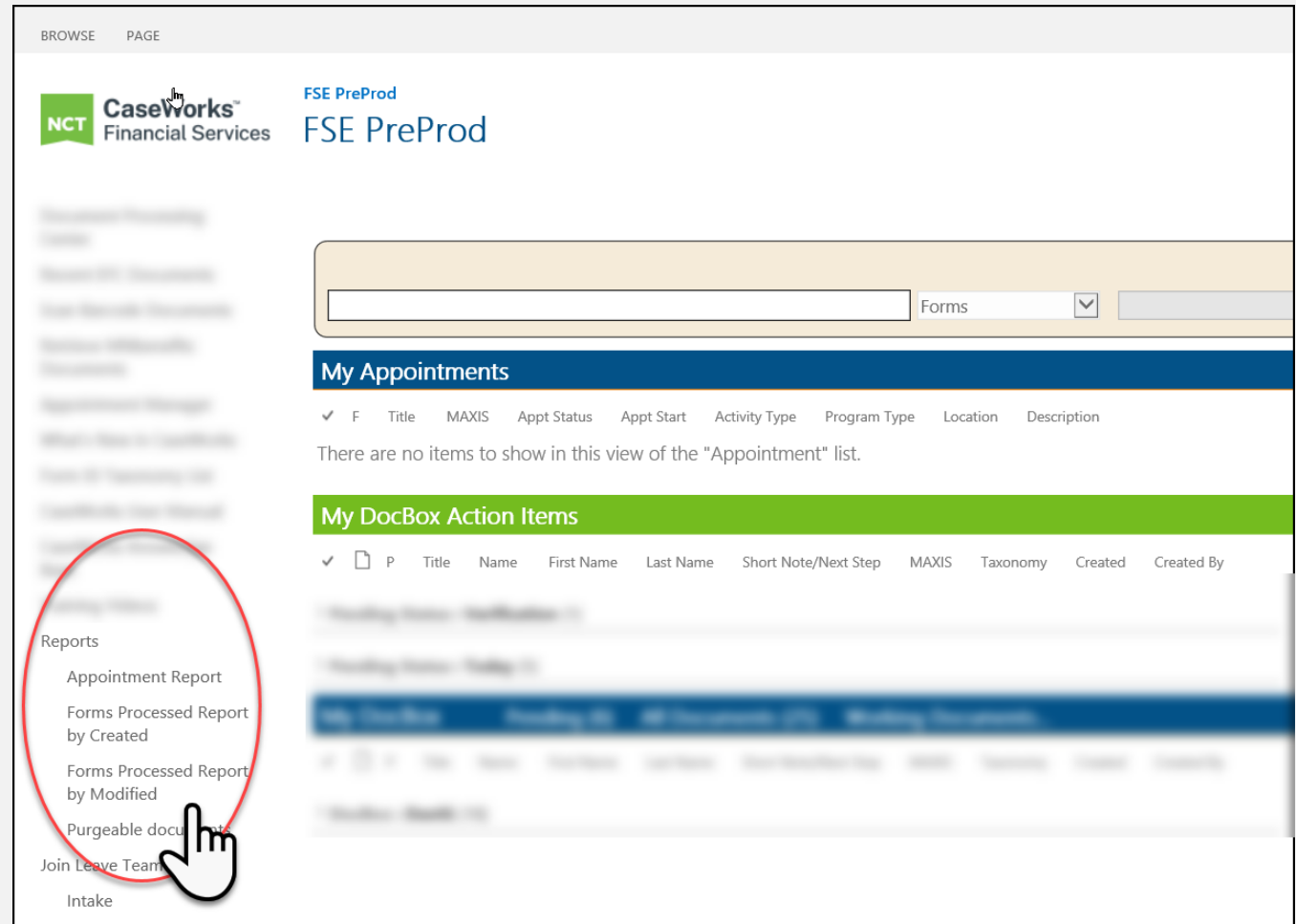
Materials provided during this training include:

- CaseWorks Reports Training presentation
- CaseWorks Reports_Analysis Instructional Guide
 - Subject to be improved and updated
- CaseWorks Reports Help Session – Thursday December 12th 11-12pm
 - This will be an open follow up session to address questions following the training content
 - Copy and paste [this link](#) to sign up
 - Feel free to sign up, even if you are unsure of attendance and need for follow up questions

Accessing Reports

NCT

- Reports are located on the *Left Navigation Panel* in each CaseWorks Edition
- If you do not have access to these links and need them added, please contact our NCT Support Team through a support ticket



CaseWorks Reports

All CaseWorks Document Reports include *only* documents that have been ***Filed to the Electronic Filing Cabinet (EFC)***

Report: *Forms Processed Report by Created*

This report includes documents that have were ***created*** within the date range in the report parameters (includes documents scanned or electronically captured)

Report: *Forms Processed by Modified*

This report includes documents that have were ***modified*** within the date range in the report parameters

CaseWorks Reports

Report: Forms Processed Report by Created

This report is useful in looking at how many documents have been scanned in and staff that created (scanned or electronically captured) during the report period

Report: Forms Processed by Modified

This report is useful in looking at how many documents have been processed, and which staff are processing these documents. This report can be analyzed for further detail of which DocTypes and how many teams have processed (Filed to the EFC).

Note: these reports will likely differ, even if run with the same parameters because a document may have been *created* during a different date range than it was *modified*

CaseWorks Reports – Additional Reports

Report: Appointment Report

This report includes all details of appointments created that are captured in CaseWorks (via Outlook)

Report: Purgeable Documents

This report includes any documents that have not been modified in *X years* as specified on the report parameters in CaseWorks. This report can be used as a supplemental tool in assessing appropriate case document purges from CaseWorks.

Report Parameters

Select staff names if limiting the report to individuals or a team

Select a Date Range to specify date range of this report

The screenshot shows the 'FSE Forms Processed Report by Modified' interface. At the top left is the 'FSE PreProd' logo, and at the top right is a 'Search this site' input field. The main title 'FSE Forms Processed Report by Modified' is centered. Below it, the subtitle 'Forms Processed Report by Modified' is displayed. The interface includes several filter sections: a 'Filter' input field, a 'Worker Name' section with a list of names (Brandon Weeks, Cathy Wassenaar, Dani Gorman) and a 'Select/Deselect All' checkbox, and a 'Modified Date' section with two date pickers (11/3/2024 and 12/2/2024). There is also a 'Document Type' section with a dropdown menu set to 'ALL' and a 'Go' button. Two red callout boxes are present: one pointing to the 'Worker Name' list with the text 'Select workers that modified documents that should be included in report', and another pointing to the 'Modified Date' date pickers with the text 'Select date range for the report'. At the bottom right, there are 'Export To:' and 'Export Detailed Data To:' options with corresponding icons. The bottom of the page features a blue banner with the text 'Forms Processed Report by Modified'.

FSE PreProd

Search this site

FSE Forms Processed Report by Modified

Forms Processed Report by Modified

Filter

☒ Select/Deselect All

Worker Name

- ☒ Brandon Weeks
- ☒ Cathy Wassenaar
- ☒ Dani Gorman

Modified Date

11/3/2024 12/2/2024

Document Type

ALL

Go

Export To:

Export Detailed Data To:

Forms Processed Report by Modified

Accessing the Report



Export Detailed Data to view and save in Excel Format

Tip: Save your Excel immediately with a format that includes report date range parameters for easy reference

A screenshot of the 'FSE PreProd' web application interface. The main heading is 'FSE Forms Processed Report by Modified'. Below this, there's a sub-heading 'Forms Processed Report by Modified'. The interface includes several filter sections: 'Worker Name' with a list of names (Brandon, Cathy W, Dani Go) each preceded by a checked checkbox; 'Modified Date' with a date range from '11/3/2024' to '12/2/2024'; and 'Document Type' with a dropdown set to 'ALL' and a 'Go' button. On the right side, there are two export options: 'Export To:' with a PDF icon and 'Export Detailed Data To:' with an Excel icon. A red callout box with the text 'Export Detailed Data to open and save in Excel Format' points to the 'Export Detailed Data To:' link. A hand cursor icon is positioned over the Excel icon. The top left of the interface shows 'FSE PreProd' and the top right has a 'Search this site' bar.

FSE PreProd

Search this site

FSE Forms Processed Report by Modified

Forms Processed Report by Modified

Filter

☒ Select/

Worker Name

- ☒ Brandon
- ☒ Cathy W
- ☒ Dani Go

Modified Date

11/3/2024 12/2/2024

Document Type

ALL

Go

Export To:

Export Detailed Data To:

Export Detailed Data to open and save in Excel Format

Accessing the Report

Export To: PDF for a summary of Report

FSE PreProd

Search this site

FSE Forms Processed Report by Modified

Forms Processed Report by Modified

Filter

Worker Name

Modified Date

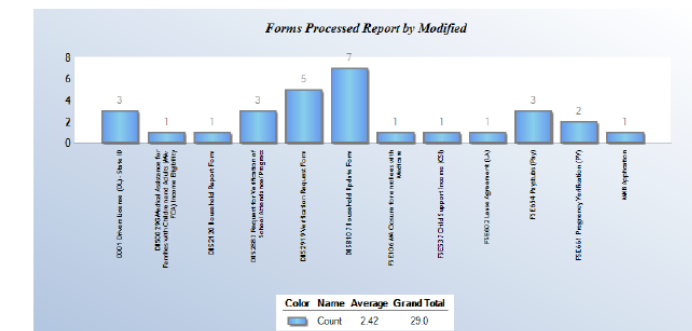
Document Type

Export To:  

Export Detailed Data To:  

Applied Criteria	
Worker Name	Brandon Weeks,Cathy Wassenaar,Dani Gorman,Eric Duong,Henry Luu,Jimmy Corder,Megan Otto,Mike Luu,Nikk Livingston,System Account,Xou Le Vang
Start Date	11/3/2024 12:00:00 AM
End Date	12/2/2024 12:00:00 AM
Document Type	ALL

Form Processed Report by Modified	
Title	Processed
D001 Drivers License (DL) - State ID	3
DHS0029G Medical Assistance for Families with Children and Adults (MA-FCA) Income Eligibility	1
DHS2120 Household Report Form	1
DHS2883 Request for Verification of School Attendance/Progress	3
DHS2919 Verification Request Form	5
DHS8107 Household Update Form	7
FSE106 MA Closure for enrollees with Medicare	1
FSE537 Child Support Income (CSI)	1
FSE602 Lease Agreement (LA)	1
FSE654 Paystubs (Pay)	3
FSE661 Pregnancy Verification (PV)	2
MNB Application	1



Prepping a Report and Report Analysis

Please refer to the *CaseWorks Reports – Analysis Instructional Guide* for specific step-by-step instructions on report analysis

Tip: Follow the trainer and use the guide later to run and analyze your own reports.