
ACCESSING MANAGEMENT REPORTS VIA FACES.NET

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Management Reports allow supervisors, program managers and social workers to track various statistics and measures of case management performance. For example, a management report can be generated that tracks which cases have current case plans. Management Reports are accessed through an icon on the Bread Crumbs tool bar that will only appear if you have the appropriate security level. Although Management Reports are non-modifiable, they can be exported in Excel, Word, PDF, etc., and printed. Management Reports are a useful strategic tool for measuring compliance with Best Practice. As the saying goes, “If it’s not in FACES.NET, it DID NOT happen”. Management Reports are an excellent way to check if data is being appropriately entered in FACES.NET as set forth by the BPIP, MFO and the AIP.



Pointers to Remember:

1. The **Management Reports** button is available under the Admin main module. However, if Management Reports is not listed on your menu, you may not have the level of security to view the report.
2. Social Workers will only be able to view the information for their caseload and a limited number of reports.

How to Access Management Reports from within FACES.NET

Steps Include:

Step 1: Place your mouse over the **Admin** drop down menu.

Step 2: Click on **Management Reports**.

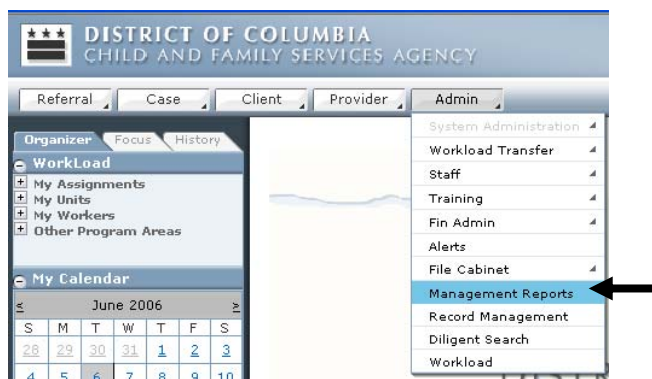


Figure 1

Step 3: Choose the **Report Category**. After a report category is chosen, the list of report titles will be filtered to show only those reports related to the category chosen.

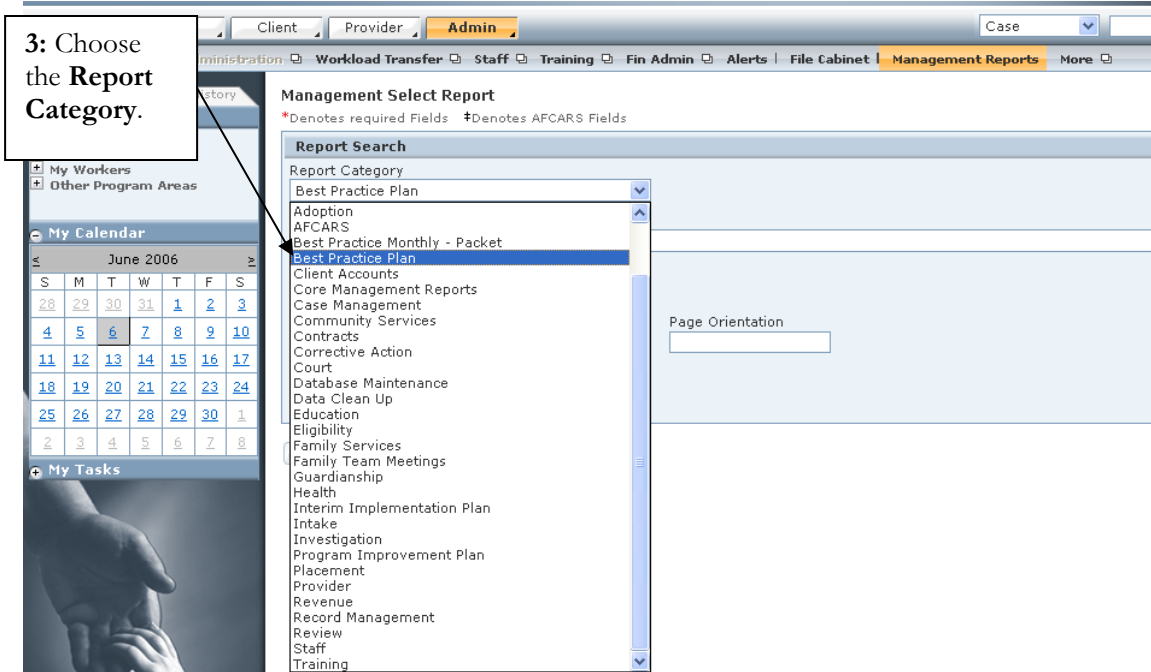


Figure 2

Step 4: Choose a **Report Title** to view. After this selection is made, the **Report Number**, **Paper Size**, and **Page Orientation** will automatically populate (See *Figure 4*).

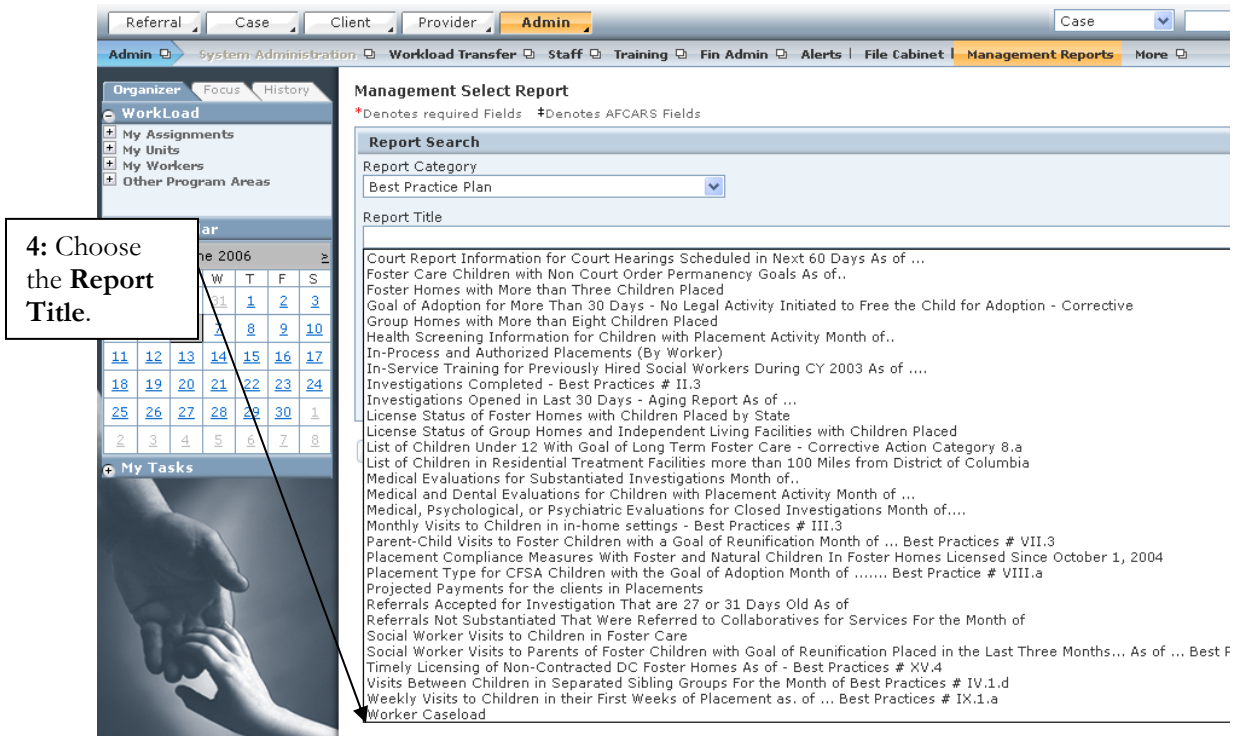


Figure 3

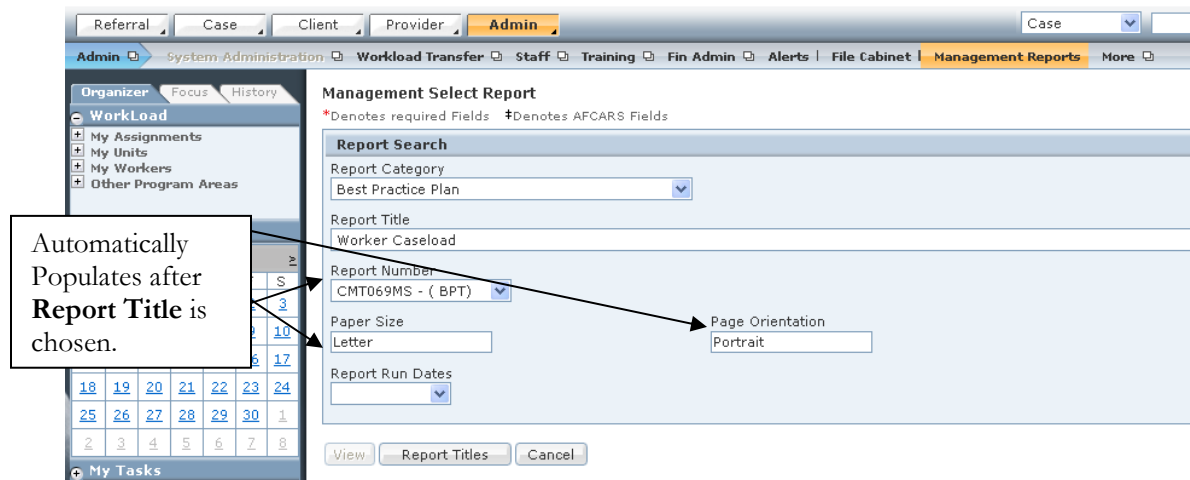


Figure 4

Step 5: Choose a date from the **Report Run Dates** field.

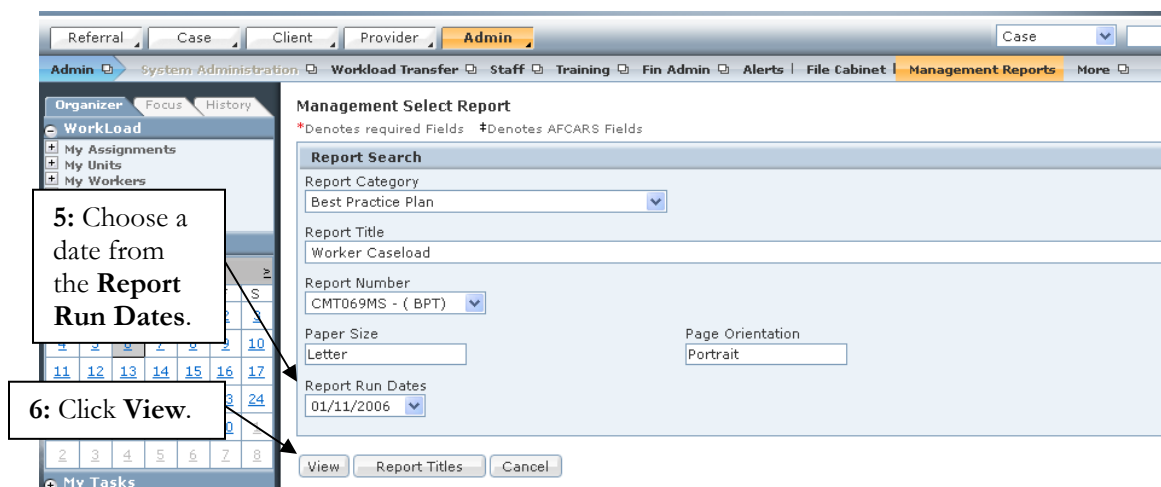


Figure 5



Notes:

- Each Management Report is assigned a **Report Number**. Once a worker becomes familiar with the report numbers designated for certain reports, it may be easier to search for a report by the **Report Number** field. If the **Report Number** is manually chosen at any time, then the system will automatically populate the **Report Category**, **Report Title**, **Paper Size**, and **Page Orientation**.
- Management Reports are run daily, weekly or monthly. Typically this can be determined based on the listed dates in the **Report Run Dates** field. For instance, if the listed dates from which to choose appear for every day of the week, then the report is generated daily.

Step 6: Click **View**. Clicking **View** will generate and open the report. When the report is open, it can then be analyzed, printed and exported if needed (See **Figure 6**).

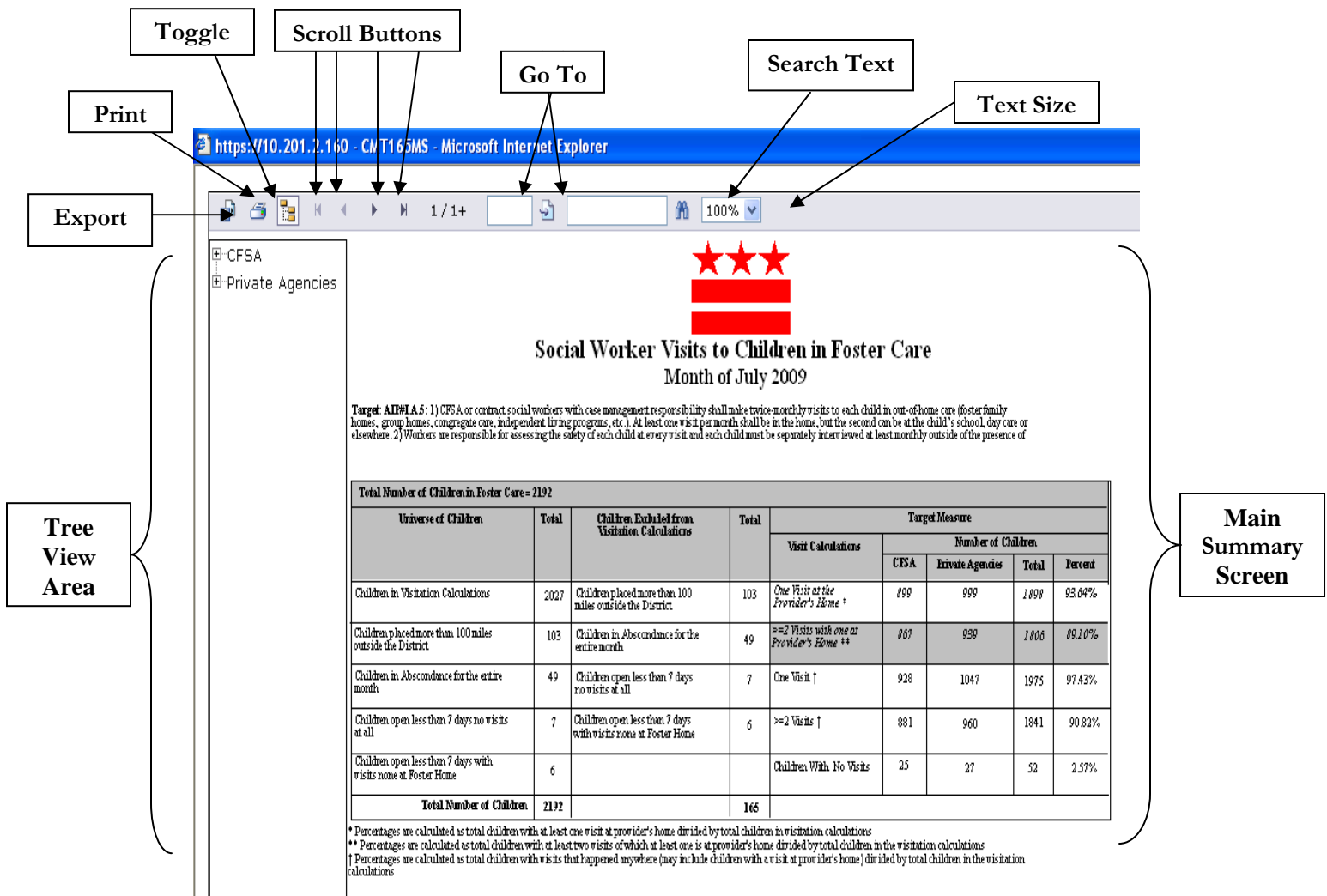


Figure 6



Note:

- The **Export** button allows you to export the report in the following formats:
 Crystal Reports (RPT)
 Acrobat Format (PDF)
 MS Word
 MS Excel 97-2000
 MS Excel 97-2000 (Data Only)
 Rich Text Format
- The **Print** button allows you to print the report.
- The **Toggle** button allows you to expand and collapse the information in the tree view area.
- The **Scroll**, **Go To** and **Search Text** buttons allows you to search the information on the report by page.
- The **Text Size** area allows you to increase or decrease the text size on the report.

Step 7: Click the **Node (+/-)** beside CFSA or Private Agencies on the left side of your screen. Clicking that Node will expand or collapse the Tree View.

Figure 7

Step 8: Click on the **Node (+/-)** in front of the Agency listed in the tree view area. The Program Managers name (for that area) will be listed.

Note:



- This information is filtered by Program Administrator, Program Manager, Program Area, Supervisor and Social Workers (in alphabetical order) within that area.
- Clicking on a **Program Manager's name** will pull the report into focus. The top of the report will list the Supervisor and the worker that is in focus.
- Clicking on the **Worker's Name** will bring their caseload into focus. Their name will be highlighted at the top of the page.
- Clicking on the Node (+/-) will display the Program Area. When you click the Node (+/-) in front of the Program Area, this will list the Supervisor and their workers will be listed under their name.

Exporting Management Reports

After reviewing the information within the report, you have the option to print and export the information.

Step 1: When exporting information click the **Export** button. Clicking Export will allow you to choose the exporting format:

- Crystal Reports (RPT)
- Acrobat Format (PDF)
- MS Word
- MS Excel 97-2000
- MS Excel 97-2000 (Data Only)
- Rich Text Format

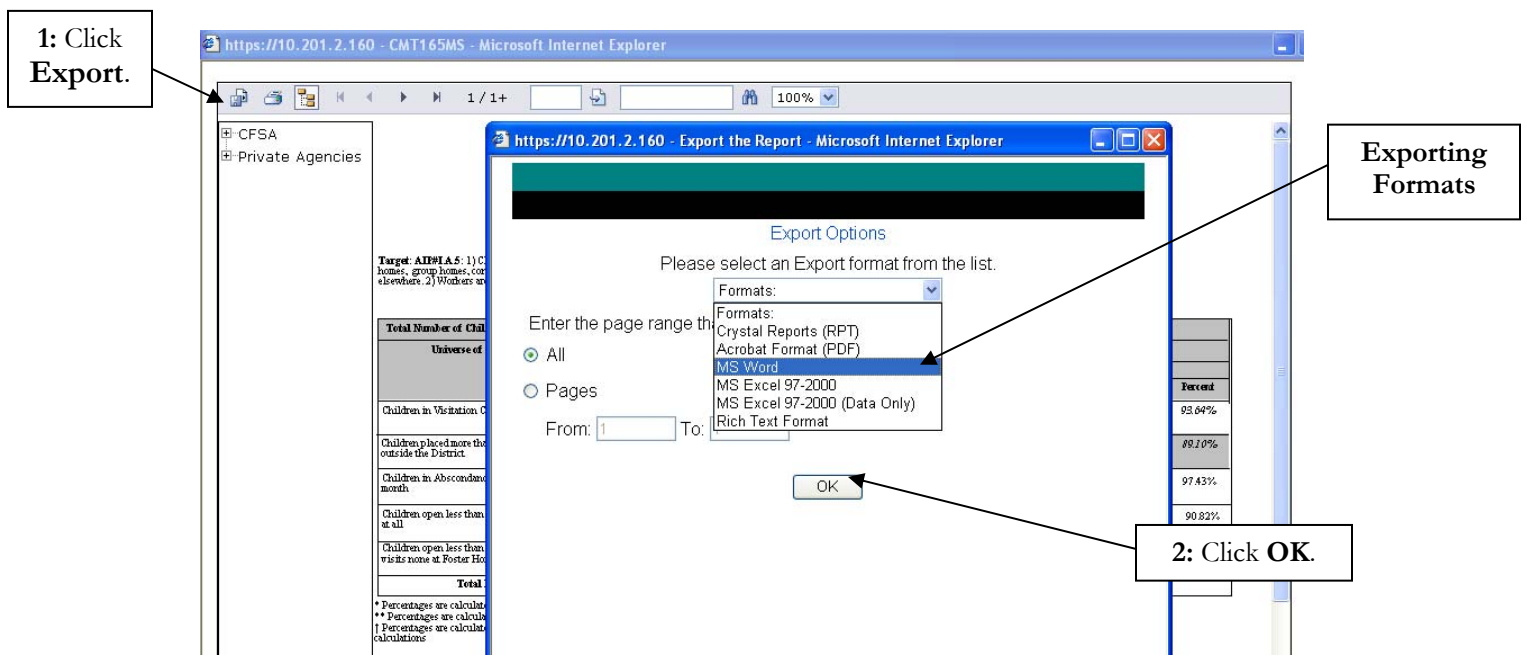


Figure 8

Step 2: Once you have selected the Exporting Format, click **OK**.

Step 3: Before printing the information, you must save the exported file. Click **Save**. (See *Figure 9*).

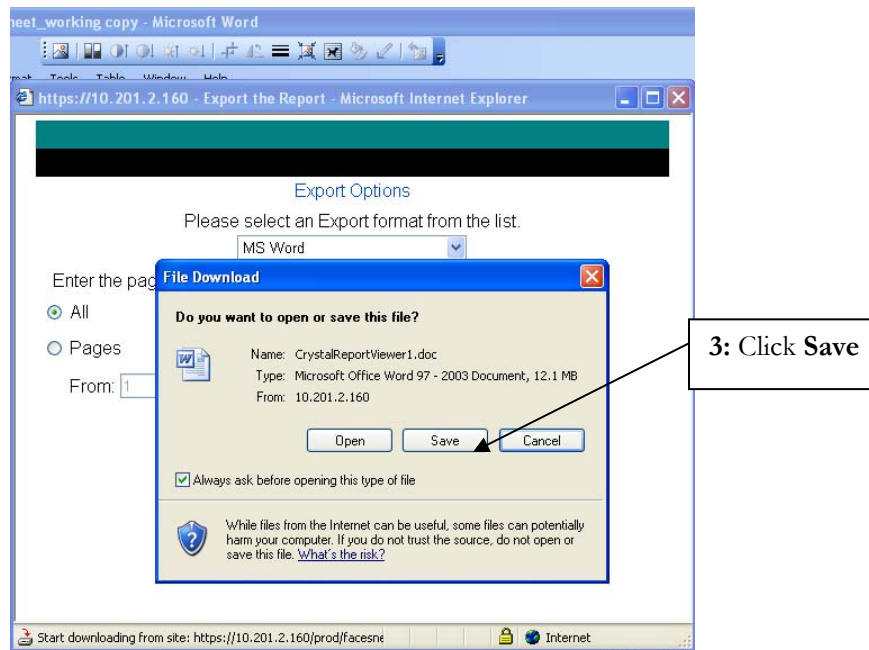


Figure 9

Step 4: To view the report in new format, Click **Open**. (See *Figure 10*).

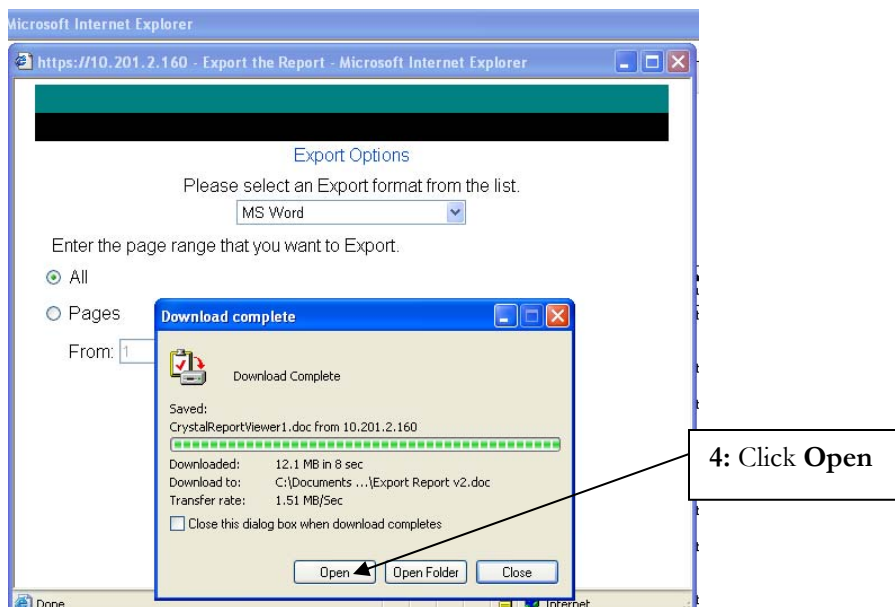


Figure 10



Note:

- After you have created a file name and saved the exported information, you will be able to retrieve and print the document.

Most Commonly Referenced Management Reports Include (but not limited to):

- CMT012MS – Parent-Child Visits to Foster Children with a Goal of Reunification
- CMT328MM - Family Caseload County by Program Administrator and Manager
- CMT163MS – Case Plans for CFSA Children in Foster Care
- CMT164MS – Case Plans for Family Cases
- CMT165MS – Social Worker Visits to Children in Foster Care
- CMT166MS – Monthly Visits to Children in In-Home Settings
- INT003MS – CFSA Hotline Calls
- INV002MS – CFSA Open Investigations by Type and Days Open
- IVV068MS – Intake & Investigation Caseload Count by Worker
- HTH004MS – Health Screening information for Children with Placement Activity Month of
- HTH005MS– Medical and Dental Evaluations for Children with Placement Activity in the last 3 Months
- ADP070MM – Foster Care Children with the Goal of Adoption
- PLC234MS – Multiple Placement Report for Children In FY...As of...AIP I.B.13
- COR013MM – Corrective Action Summary