
**A CONNECTIONS Quarterly Improvement
Q4-09**

**SharePoint Reporting Services
THE OPEN CASELOAD INQUIRY (OCI) Report**

“Highlights”

This document is a summary of the “highlights” of the next CONNECTIONS system quarterly improvement – the “NEW” Open Caseload Inquiry (OCI) report utilizing SharePoint reporting Services. The implementation date of this report, in its’ improved version, will be Friday, February 26, 2010.

This quarterly release is the first to use new architecture to add enhanced reporting capabilities and new technology for distribution and control. SharePoint is a product offered by Microsoft to provide a mechanism to standardize the development of Websites, portals, and reports. SharePoint will allow new reports to be developed and deployed to the user community much faster than the current technology allows.

The benefits of the new SharePoint reporting technology include:

- More efficient development capabilities that shorten delivery time for new reports considerably.
- Ease of deployment without down time because the reports are outside the application.
- Asynchronous capabilities, which allow a caseworker to request a report for delivery at a later time while continuing to work in CONNECTIONS, thus providing greater flexibility for caseworkers.
- Expanded formatting, sorting and other ease-of-use features.

This OCI report expands the existing worker level report, combines current reports for Investigation and Family Services Stages into one configurable report, and provides new alerts for Foster/Adoptive Home stages.

Implementation has been phased in order to fully evaluate infrastructure requirements and risk. The new reporting functionality and the new Open Case Inquiry report (OCI) was deployed initially as a pilot to a pre-selected group of caseworkers in Albany County. The pilot was expanded to all workers in Albany county, and then to Broome county. Implementing the new functionality as a pilot allowed OCFS to assess the impacts and suitability of these technologies for statewide use.

A Description Of What the Open Caseload Inquiry (OCI) Is And How You Will Access It...

The Open Caseload Inquiry, or OCI as it is known, is a caseworker specific report that gives prompts to let you know when work is coming due or is overdue. This report is available to both district and voluntary agency caseworkers with a role in a stage. The OCI report helps a caseworker manage their workload in order to meet regulatory and

policy requirements. It should be noted that the OCI report is available to caseworkers now, but with a smaller cue set and through a different method of access.

Currently this report is accessed through the CONNECTIONS application via the Report List ICON. The *new* OCI report will be available via a *new* ICON, that utilizes an application called SharePoint and will be located on the CONNECTIONS desktop window. An illustration of the new ICON is included below.



More details about exactly how to access, the new ICON, including illustrations, can be found in the *CONNECTIONS Job Aid SharePoint Open Caseload Inquiry (OCI) Worker Report*.

Key Features of the OCI Report...

All cues currently supported in CONNECTIONS are supported in the new report. New cues have also been added in order to help workers manage their workloads and meet regulatory and policy requirements. The new cues are in the following areas:

- INV and FSS stages - Progress Notes cues have been added
- FSS stage - Health and Education cues have been added
- FAD stage - Foster and Adoptive Home cues have been added

You can customize the OCI report by selecting one of the following parameters:

- one or more specific stage types (INV, FSI, FSS or FAD)
- or within the FSS stage, by functional area (Education, FASP, Health, Progress Notes)

The OCI report is divided into two sections, with a generic header repeated throughout. The selected report parameters are identified on the top of each report.

- Section 1 of the report is comprised of a detailed list of all INV, FSI, FSS or FAD stages assigned to a particular caseworker, and the relevant cues.
- Section 2 of the report provides aggregate counts of the caseload as well as the upcoming and overdue tasks that are contained in the Section 1 detail.

It should be noted that all cue descriptions are included in the job aid.

The Implementation Schedule

- Albany region and associated voluntaries: 2/26/10
- Syracuse region and associated voluntaries: 3/5/10
- NYC and associated voluntaries: 3/5/10
- Spring Valley region and associated voluntaries: 3/12/10
- Buffalo region and associated voluntaries: 3/12/10
- Rochester region and associated voluntaries: 3/12/10

Further Information

More detailed information about how to access the OCI report, descriptions of the various windows that the report involves, more in-depth summaries of the various cues – both static and new and information about the Report Summary section and the report cues by stage can be found in the job aid titled: *CONNECTIONS Job Aid SharePoint Open Caseload Inquiry (OCI) Worker Report*. The job aid is posted to the CONNECTIONS intranet and can be accessed via the following path: from the OCFS internet (<http://ocfs.state.nyenet/>) > click on the OCFS intranet) > click on CONNECTIONS > click on Step-by-Step/Job Aids/Tips.