Current Caseload Details by Worker

Report Background The Current Caseload Detail by Worker report can help supervisors and managers monitor the active caseloads of their workers and/or workers at other agencies that are assigned to their cases with open Stages.

Report Purpose Provides Local Districts and Voluntary Agencies with details about their currently assigned workers, active cases, open stages, children in open stages, tracked children, and placed children. Workers, cases, and children in any kind of open Intake stage (INT), Investigation stage (INV), Family Services Intake stage (FSI), and Family Services Stage (FSS) are included. Details can also be provided for supporting agencies that have workers assigned to the Stages.

Target Users Supervisors, Managers and all case assignable staff from Local Districts and Voluntary Agencies

Classification Operational report

Prompts Upon opening the report, users are asked to select one or more values from a list of choices for the following report prompts:

- District/Agency: Select the name of the Local District or Voluntary Agency for which you want to run the report. Districts and agencies are listed alphabetically by agency code.

- Agency for Report (LDSS version only): Select the name of the agency with staff assigned to the Local District's cases that you want to include in the report. This window pre-populates based on the District/Agency selected. The Local District is listed first and agencies are listed alphabetically by agency code.

  Office Name: Select the name of the Offices that you want to include in the report. This window pre-populates based on the Agency selected. Hold down the Ctrl key on your keyboard to select multiple Offices or use the Select All hyperlink to choose all of them. *Important: Every time you select or deselect an Office Name, you must click the button to the right of the prompt to refresh the list of Site Code/Unit Numbers.*

- Unit Number: Select the Site Code and Unit Number that you want to include in the report. Hold down the Ctrl key on your keyboard to select multiple Units or leave the prompt blank to select all. The list is alphabetical by Site ID and Unit Number to uniquely display the office Units for a particular Local District or Voluntary Agency.

Notes **This report reflects the current caseload only; no history can be provided. The supporting data package is not available for ad hoc reporting, and users cannot customize this report with Report Studio.** Data for this report is refreshed weekly. If your report is blank when you run it, review the header area to make sure you did not select conflicting values from the Office Name and Unit Number prompts.

Data Item	Data Definition
LDSS Name (LDSS version only)	The 3-digit agency code and name for the Local District selected at the report prompt.
Agency Name	The 3-digit agency code and name for the Agency selected at the report prompt.
Stage Type	This report includes open Intake stages (INT), Investigation stages (INV), Family Services Intake stages (FSI), and Family Services Stages (FSS).
Data as of date	The latest refresh date of the OCFS Data Warehouse – that is, the last time data was received from CONNECTIONS and CCRS. Data for this report is refreshed weekly.
Report Date	The date on which the report was run.
Office Name	The names of the Offices selected at the report prompt.
Office Site	The Site Codes for the Offices selected at the report prompt.
CONX Office ID	The CONNECTIONS Office ID for the Offices selected at the report prompt.
Zone	A code that identifies the zone of a unit within the office. This will only appear if a zone exists.
UA3 Name **UA2 Name** **UA Name**	The name and classification code of the person assigned as the Unit Approver for the Unit listed. *[UA3 corresponds to the highest-level Unit Approver, UA2 corresponds to the middle-level Unit Approver, and UA corresponds to the lower-level Unit Approver.]* UA3 and UA2 Name will only appear if they exist. For more information, see Unit Hierarchy Prototype at the end of this document.
UA3 Unit Number **UA2 Unit Number** **UA Unit Number**	The 3-digit alphanumeric code which identifies the Unit Number of the Unit Approver. *[UA3 corresponds to the highest-level Unit Approver, UA2 corresponds to the middle-level Unit Approver, and UA corresponds to the lower-level Unit Approver.]* UA3 and UA2 Unit Number will only appear if they exist. For more information, see Unit Hierarchy Prototype at the end of this document.
UA3 Address **UA2 Address** **UA Address**	The current primary street address of the Unit Approver. *[UA3 corresponds to the highest-level Unit Approver, UA2 corresponds to the middle-level Unit Approver, and UA corresponds to the lower-level Unit Approver.]* UA3 and UA2 Address will only appear if they exist. For more information, see Unit Hierarchy Prototype at the end of this document.
Unit Number	The office Units selected at the report prompt.
Unit Specialization	The Specialization and 3-digit Unit Specialization code for the office Units selected at the report prompt.

Data Item	Data Definition
Worker	The name of each in-assigned worker and the CONNECTIONS Worker ID from the selected District/Agency that has a role in the Stage.
LDSS (VA version only)	The 3-digit agency code for the Case Manager assigned for FSS Stages, or the Primary Worker for INT/INV Stages, or the Caseworker for FSI Stages.
Case ID	A unique integer which identifies the case that the open Stage belongs to. A case may have several different Stage types open at the same time.
Case Name	This is the name of the case. The case can be named or renamed after any principal listed in the case. The name of the case is originally defaulted to the first principal listed on the Intake. It is then changed via the Change Stage/Case Name window.
INV Ind	The number of Investigation stages in the case with a final approved determination of 'IND' (Indicated).
INV Unf	The number of Investigation stages in the case with a final approved determination of 'UNF' (Unfounded).
INV Active	The number of active/open Investigation stages in the case which do not have a final approved Investigation conclusion (Undetermined). Consolidated and withdrawn Investigations are not included.
FSS Closed	The number of Family Services Stages in the case that are closed, meaning the final approval date is entered in CONNECTIONS.
FSS Active	The number of Family Services Stages in the case that are active/open. This count should not be greater than one; although cases can have several different Stage types open at a given time, only one FSS should be open at a given time.
Total INV & FSS	The total number of Investigation and Family Services Stages in the case. Consolidated and withdrawn Investigations are not included.
Stage ID	A unique integer which identifies a Stage. This is automatically generated each time a new stage is created either by taking a new intake or progressing to a new stage of service. Unprogressed Intake stages that are still active are included. (For some reason, some Intake stages haven't progressed into INV stages after a certain number of days.)
Type/Sub Type	A three-character value to indicate the type of service Stage (INT, INV, FSS, FSI) and the code value to further define the stage type. All subtypes of Intakes, Investigations, Family Services Intakes, and Family Service Stages are included in the report.
Stage Start Date	The date the Stage was opened. This is the Intake Start Date for INT and INV stages, and the Stage Start Date for FSI and FSS stages.
Days Active	Days between Stage Start Date and 'Data as of' date. Remember the data for this report is refreshed weekly.

Data Item	Data Definition
Wkr Role	The role of the worker assigned to the Stage.
Assign Start Date	The date the worker was assigned to the Stage in CONNECTIONS.
CP Agency	The 3-digit agency code of the Case Planner assigned to the Stage.
Initial FASP Status	The status of the Initial FASP for FSS Stages. Values include: • APRV – Approved • MISS – Missed • NFND – Not Found • NLNC – Not Launched • PEND – Pending • PROC – In Process • TEMP – Template
Stage Children	The number of children in open Stages in CONNECTIONS. For INT and INV Stages, the child must be under age 18 and assigned one of the following roles in the Stage to be counted: • MA - Maltreated Child • CM - Confirmed Maltreated • AB - Abused Child • CA - Confirmed Abused • NO - No Role • UK - Unknown • NA - Non-confirmed Abused • NM - Non-confirmed Maltreated • PC - Primary Child • VI - Victim For FSI and FSS Stages, the child must be in one of the following categories to be counted: • Tracked in CONNECTIONS • Under the age of 18 and not the Primary Caregiver or Secondary Caregiver.
CONX Tracked Children	The number of children in open Stages in CONNECTIONS with at least one valid PPG and Program Choice.
CONX Children w/ Program Choice 'Placement'	The number of children in open Stages in CONNECTIONS with Program Choice 'C' (Placement).

Data Item	Data Definition
Foster Care Children	The number of children with a current CCRS child status code of '04' (In 24 Hr Care), '06' (Absent), or '07' (Trial Discharge). This information only displays for FSS Stages, where the CONNECTIONS data has been synched with WMS data for the case. CCRS remains the system of records for Foster Care placements.
Assoc. Children w/Wkr	The number of children 'associated' with the worker.
Assoc. w/Other Wkr	The number of children 'associated' with other workers.
Child Load	The number of children the worker is 'responsible' for. For INT Stages, the child load is 0. For INV Stages, the child load is the number of Stage Children if the worker is Primary Worker; otherwise, the child load is 0. For FSI Stages, the child load is 0. For FSS Stages: - If the worker is CM and no CP exists, the child load is the number of Tracked Children minus number of children associated with other workers; if CP exists, the CM child load is 0. - If the worker is CP, the child load is the number of Tracked Children minus number of children associated with other workers. - If the worker is CW, the child load is number of children associated with this worker. - If the worker is CPS Wkr/Mon, the child load is 0. - Does not apply to ADVPO cases.
WMS No. in CONX	The case number used in the WMS system. This information only displays for FSS Stages, where the CONNECTIONS data has been synched with WMS data for the case.
WMS Status in CONX	The status of the case in the WMS system. This information only displays for FSS Stages, where the CONNECTIONS data has been synched with WMS data for the case. Values include: A - Active
# of Distinct Cases	The total number of distinct cases for the worker, unit, UA2, UA3, zone, office, and agency.
# of Distinct Stages	The total number of distinct stages for the worker, unit, UA2, UA3, zone, office, and agency.
# of Distinct Workers	The total number of distinct workers for the unit, UA2, UA3, zone, office, and agency.
Assignment Type Counts	The total assignment type counts for the worker, unit, UA2, UA3, zone, and office. These are not distinct counts.
Cumulative Children Counts	The cumulative child counts from all workloads, including the worker, unit, UA2, UA3, zone, and office. These are not distinct counts.

CONNECTIONS Unit Hierarchy Prototype

(Used by ACS and certain Voluntary Agencies that contract with ACS)

Unit Number: In CONNECTIONS, each worker can have only one IN-Assigned unit at any given time.

UA Address: The location of a unit (i.e., unit site) is determined by the street address that is recorded in CONNECTIONS for the unit approver of the unit.

Unit Approver: The unit approver is the person to whom the members of the unit report. In designating a unit approver, the following guidelines should be followed:

➢ The unit approver should not be IN-assigned to the unit he/she is supervising.

➢ An individual should be designated as unit approver of only one field or applications unit at a time.

CONX Unit Hierarchy Prototype

UA = Unit Approver

Director Level (3)

Unit F4C	
UA of ADA	In
Worker (UA F3C)	In
Worker	In
Worker	In

Reports To

Manager Level (2)

Unit F3C	
UA of Unit F3C	Out
Worker (UA F2C)	In
Worker	In
Worker	In

Reports To

Supervisor Level (1)

Unit F2C	
UA of Unit F2C	Out
Worker (UA F0D)	In
Worker (UA F0C)	In
Worker (UA F0B)	In
Worker (UA F0A)	In

F0A Approver Reports To
F0B Approver Reports To
F0C Approver Reports To
F0D Approver Reports To

Worker Level (0)

Unit F0A	
UA of Unit F0A	Out
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In

Unit F0B	
UA of Unit F0B	Out
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In

Unit F0C	
UA of Unit F0C	Out
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In

Unit F0D	
UA of Unit F0D	Out
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In
CONX Worker role	In