

REPORTING: MODULE OVERVIEW

Module Overview:

OSST includes access to Management Reports that can be used to view current caseload and case information for regions throughout the State of Florida.

One of the key features of the management reports in OSST is that you can navigate to lower and higher levels of detail as necessary to gain an understanding of the statewide results all the way down to the career manager level in many reports.

NOTE: The estimated time to complete this module is as follows:

Presentation: 30 minutes

Demonstration: 30 minutes

Activity: 30 minutes

Key Speaking Points:

There are 25 reports available in OSST. The following table provides an overview of each report:

| Report # | Report Name | Report Description | Level |
|-----------------|-------------------------------|---|-------------------|
| 1a | Caseload Program Types Report | Displays the number of open cases, by case type | By Region |
| 1b | Caseload Program Types Report | Displays the number of open cases, by case type | By Unit |
| 1c | Caseload Program Types Report | Displays the number of open cases, by case type | By Career Manager |
| 1d | Caseload Program Types Report | Displays the number of open cases, by case type | By Case |
| 2a | To-Do Report | Displays the number of To-Dos, by type | By Region |
| 2b | To-Do Report | Displays the number of To-Dos, by type | By Unit |
| 2c | To-Do Report | Displays the number of To-Dos, by type | By Career Manager |

Trainer Materials

| Report # | Report Name | Report Description | Level |
|----------|---|--|-------------------|
| 3a | Open Cases with No Recorded Countable Activities Report | Counts number of customers not currently assigned to a countable activity | By Region |
| 3b | No Recorded Countable Activities Report | Counts number of customers not currently assigned to a countable activity | By Unit |
| 3c | No Recorded Countable Activities Report | Counts number of customers not currently assigned to a countable activity | By Career Manager |
| 3d | No Recorded Countable Activities Report | Counts number of customers not currently assigned to a countable activity | By Case |
| 4a | No Recorded Activity Report | Displays the number of customers who have no activities (countable or not) | By Region |
| 4b | No Recorded Activity Report | Displays the number of customers who have no activities (countable or not) | By Unit |
| 4c | No Recorded Activity Report | Displays the number of customers who have no activities (countable or not) | By Career Manager |
| 4d | No Recorded Activity Report | Displays the number of customers who have no activities (countable or not) | By Case |
| 5a | Countable Report | Displays the number of customers participating in each of the countable activities | By Region |
| 5b | Countable Report | Displays the number of customers participating in each of the countable activities | By Unit |

Trainer Materials

| Report # | Report Name | Report Description | Level |
|----------|----------------------|---|-------------------|
| 5c | Countable Report | Displays the number of customers participating in each of the countable activities | By Career Manager |
| 6a | Non-Countable Report | Displays the number of customers participating in each of the non-countable activities, by type | By Region |
| 6b | Non-Countable Report | Displays the number of customers participating in each of the non-countable activities, by type | By Unit |
| 6c | Non-Countable Report | Displays the number of customers participating in each of the non-countable activities, by type | By Career Manager |
| 7a | Deferrals Report | Counts number of customers that are currently deferred, by type of deferral | By Region |
| 7b | Deferrals Report | Counts number of customers that are currently deferred, by type of deferral | By Unit |
| 7c | Deferrals Report | Counts number of customers that are currently deferred, by type of deferral | By Career Manager |
| 7d | Deferrals Report | Counts number of customers that are currently deferred, by type of deferral | By Case |