

**NCBVI Client Data System RFP**

**Appendix A**

**Monthly Case Reports**

Please find on the following pages examples of monthly reports generated in the present eForce System.

Close

### Master Status List

#### Report Criteria

Staff:

Show: Open

Enable Paging

Large Print

Case Type: VR

Case Status: All

Begin Date:

End Date:

Submit

\*For Open Cases, do not enter any dates. For Closed Cases, enter a Begin Date and an End Date.

#### Report Results

Client Name	Case Manager	Case Type	Current	00	02	10	18	20	22	08-00	08-02	26	28	30
		VR	18	3/23/2011	3/30/2011	4/13/2011	5/26/2011							
		VR	18	8/27/2013	9/5/2013	9/5/2013	9/18/2013							
		VR	18	11/13/2012	11/27/2012	12/6/2012	12/19/2012							
		VR	18	2/1/2007	2/1/2007	3/1/2007	3/7/2007							
		VR	18	8/22/2014	10/30/2014	10/30/2014	11/12/2014							
		VR	18	10/20/2015	10/20/2015	10/20/2015	10/20/2015							
		VR	18	9/24/2002	9/24/2002	9/24/2002	9/24/2002							
		VR	18	6/4/1999	6/4/1999	7/13/1999	8/3/1999							
		VR	20	2/14/2012	4/16/2012	4/16/2012	4/23/2012	7/2/2012	7/2/2012					
		VR	18	8/21/2008	8/21/2008	8/21/2008	8/21/2008							
		VR	18	4/6/2009	4/6/2009	5/15/2009	5/15/2009							
		VR	18	11/3/2015	11/5/2015	11/5/2015	11/5/2015							
		VR	18	3/13/2015	3/13/2015	3/16/2015	5/6/2015							

Transfers

Month of Transfer: October

Year of Transfer: 2015

Search For Transfers

View All Transfers

Client ID	Client Name	From Manager	To Manager	Date of Transfer	Case ID	Status At Transfer
168851				10/13/2015	172496	13
168906				10/13/2015	172466	01
168903				10/13/2015	172465	01
168620				10/13/2015	172463	15
168909				10/13/2015	172467	01
168317				10/20/2015	171356	18
167314				10/20/2015	169608	18
168172				10/20/2015	171077	22
166042				10/20/2015	172323	22
167298				10/20/2015	169585	18
165604				10/16/2015	167506	18
168499				10/20/2015	171854	17
167993				10/16/2015	170947	18
164453				10/20/2015	170945	15

[Close](#)

### Master Status List

#### Report Criteria

Staff:  Show:  Enable Paging  Large Print   
Case Status:  Begin Date:  Case Type:  End Date:

\*For Open Cases, do not enter any dates. For Closed Cases, enter a Begin Date and an End Date.

#### Report Results

Client Name	Case Manager	Case Type	Current	00	02	10	18	20	22	08-00	08-02
		VR	28	4/28/2015	5/6/2015	5/12/2015	5/13/2015				
		VR	26	4/19/2010	5/14/2010	5/14/2010	5/27/2010		8/27/2015		
		VR	08	6/1/2015	6/8/2015						10/15/201
		VR	28	6/2/2014	6/2/2014	6/2/2014	7/31/2014	8/6/2014	10/9/2015		
		VR	08	10/21/2015						11/17/2015	
		VR	26	5/21/2010	5/21/2010	7/28/2010	10/13/2010	7/13/2015	8/3/2015		

Total Record Count = 6

[Close](#)

### Master Status List

#### Report Criteria

Staff:  Show: **Closed**  Disable Paging  Large Print   
Case Status: **All**  Begin Date: 10/01/2015  Case Type: **IL**  End Date:

\*For Open Cases, do not enter any dates. For Closed Cases, enter a Begin Date and an End Date.

#### Report Results

Client Name	Case Manager	Case Type	Current	01	03	11	13	15	17	07-01	07-03	25	27
		IL	25	4/24/2013	4/24/2013	4/24/2013			4/24/2013			11/25/2015	
1													

Total Record Count = 1

Close

### Caseload Activity

#### Report Criteria

Large Print

Staff:  Show:  Case Type:   
 Case Status:  Begin Date:  End Date:

\* Dates are based on the Status Date.

#### Report Results

Case Manager	01	03	11	13	15	17	07-01	07-03	25-Employed	25-Refer to VR	25-Other	27-Withdrew	27-Moved	27-Institutionalized	27-Deceased
	1	1	0	0	0	0	0	0	0	1	0	0	0	0	0
	7	6	6	6	0	0	1	0	0	0	4	0	0	0	0
	3	1	1	1	0	0	0	0	0	2	5	0	0	0	0
	3	3	3	0	2	1	1	0	0	0	0	0	0	0	0
	28	20	20	18	2	0	9	0	0	0	14	1	0	0	0
	17	9	9	9	0	0	6	0	0	0	6	0	0	0	0
	2	3	3	1	1	1	0	0	0	0	0	0	0	0	0
	11	11	11	9	2	0	0	0	0	0	2	0	0	0	1
	4	6	6	6	0	0	2	0	0	0	21	0	0	0	1
	3	3	3	1	0	1	0	0	0	2	1	0	0	0	0
	7	4	2	1	0	1	2	2	0	0	4	0	0	0	0
	13	13	13	11	2	0	0	0	0	0	11	0	0	0	1
	13	12	12	11	1	0	1	0	0	0	8	0	0	0	0
	1	1	1	1	0	0	0	0	0	0	2	0	0	0	0
<b>Total</b>	<b>113</b>	<b>93</b>	<b>90</b>	<b>75</b>	<b>10</b>	<b>4</b>	<b>22</b>	<b>2</b>	<b>0</b>	<b>5</b>	<b>78</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>3</b>

**Master Status List**

**Report Criteria**

[Disable Paging](#)

[Large Print](#)

Staff: All

Show: Open

Case Type: VR

Case Status: All

Begin Date:

End Date:

\*For Open Cases, do not enter any dates. For Closed Cases, enter a Begin Date and an End Date.

**Report Results**

Client Name	Case Manager	Case Type	Current	00	02	10	18	20	22	08-00	08-02	26	28	30
		VR	18	8/26/2014	12/10/2014	12/22/2014	1/16/2015							
		VR	18	1/2/2015	1/12/2015	1/12/2015	1/12/2015							
		VR	18	2/3/2010	2/27/2010	3/1/2010	3/11/2010							
		VR	18	1/29/2015	2/11/2015	3/9/2015	4/1/2015							
		VR	18	4/1/2014	4/1/2014	4/1/2014	4/1/2014							
		VR	18	8/8/2014	8/11/2014	8/11/2014	10/14/2014							
		VR	20	4/1/2004	4/1/2005	4/1/2005	5/5/2006	3/4/2015						
		VR	18	7/8/2013	7/8/2013	9/10/2013	11/5/2013							
		VR	18	6/4/2015	6/4/2015	7/14/2015	7/20/2015							
		VR	02	11/18/2015	12/28/2015									
		VR	18	7/1/2015	7/17/2015	7/17/2015	7/17/2015							
		VR	18	6/12/2013	6/12/2013	9/4/2013	9/4/2013							

1 2 3 4 5 6 7 8 9 10 ...

Total Record Count = 354

Close

### Master Status List

#### Report Criteria

Staff: All  
Case Status: All

Show: Open

Disable Paging

Large Print

Case Type: IL

Begin Date:

End Date:

Submit

\*For Open Cases, do not enter any dates. For Closed Cases, enter a Begin Date and an End Date.

#### Report Results

Client Name	Case Manager	Case Type	Current	01	03	11	13	15	17	07-01	07-03	25	27
		IL	13	10/16/2015	11/3/2015	11/16/2015	11/16/2015						
		IL	13	8/6/2015	8/20/2015	8/20/2015	8/20/2015						
		IL	13	9/3/2015	10/1/2015	10/1/2015	10/1/2015						
		IL	13	5/20/2015	5/20/2015	5/20/2015	5/20/2015						
		IL	15	3/16/2015	4/1/2015	4/1/2015		4/1/2015					
		IL	01	12/23/2015									
		IL	13	11/6/2015	11/9/2015	11/9/2015	11/9/2015						
		IL	13	8/5/2015	8/5/2015	8/5/2015	8/5/2015						
		IL	13	11/16/2015	11/16/2015	11/16/2015	11/16/2015						
		IL	13	10/5/2015	10/5/2015	10/5/2015	10/5/2015						
		IL	13	7/6/2015	7/7/2015	7/7/2015	7/7/2015						
		IL	13	11/9/2015	12/10/2015	12/10/2015	12/10/2015						

1 2 3 4 5 6 7 8 9 10 ...

Total Record Count = 240

Occurrences	Last Name	First Name
2		
2		
2		
2		
2		
2		
2		
2		
2		
2		
3		

[Close](#)

### Programs

This report lists clients who have participated in certain programs. Check Special Programs Only to remove Orientation and Transition. Dates are based on the Begin Date only.

#### Report Criteria

[Disable Paging](#) [Large Print](#)

Program Name:  Teacher:  Ticket To Work Status:

Date From:  Date To:

Active Programs Only

Special Programs Only

#### Report Results

SSN	Client Name	Case ID	Case Status	Case Manager	Program Name	TTW Status	Teacher	Begin Date	End Date
		S 166316	26		Home Teaching			08/01/2008	02/07/2012
		167727	28		Home Teaching			01/05/2009	01/21/2010
		166903	26	1	Home Teaching			08/01/2008	06/21/2012
		L 166818	28		Home Teaching			10/05/2005	05/12/2012
		167718	18		Home Teaching			01/05/2009	09/03/2010
		166981	26		Home Teaching			01/08/2007	12/01/2009

Report Criteria

[Large Print](#)

Staff:  Show:  Case Type:   
 Case Status:  Begin Date:  End Date:

\* Dates are based on the Status Date.

Report Results

Case Manager	00	02	10	18	20	22	08-00	08-02	26	28	30
7	6	6	5	0	2	1	1	2	2	0	
22	3	4	2	0	1	22	0	1	1	0	
6	5	6	8	2	2	2	0	2	3	0	
9	4	3	3	1	1	4	0	0	1	0	
7	3	2	1	0	0	3	1	4	2	0	
3	4	2	0	1	1	0	1	1	1	0	
4	0	0	0	0	0	2	0	0	0	0	
17	0	0	0	1	1	16	0	0	0	0	
12	7	7	7	2	2	5	2	5	2	0	
3	3	2	2	0	0	0	0	0	1	1	
1	0	0	0	0	0	1	0	0	0	0	
6	4	4	3	0	1	1	1	1	1	0	
4	0	1	1	0	0	4	0	0	0	0	
10	0	0	0	0	0	14	0	0	0	0	
0	0	0	0	0	0	1	0	0	0	0	
16	1	1	1	0	0	13	0	1	0	0	
0	0	0	0	0	0	0	0	0	3	0	
4	4	2	2	0	0	2	0	0	5	0	
<b>Total</b>	<b>131</b>	<b>44</b>	<b>40</b>	<b>35</b>	<b>7</b>	<b>11</b>	<b>91</b>	<b>6</b>	<b>17</b>	<b>22</b>	<b>1</b>

