Katrina Aid Today
A National Case Management Consortium

Issued July 6, 2007

How to Create a KAT Caseload Report

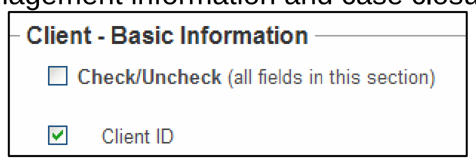
Purpose: The release of the "case transfer-locked fields" changes to CAN in June 2007 required that the criteria for creating Katrina Aid Today caseload reports be revised. This document describes the basic steps for generating a caseload report specific to a Tier III agency.

Getting started: All caseload reports from CAN are created using CAN's Export Tool, which is only accessible if the CAN user has taken the "Reports Tool" training (www.can.org/training). Once access is gained, select "Reports Tool" under the "Agency Tools" section of CAN; proceed with the selection of "Client Data Export Wizard;" followed by logging in to the Export Tool.

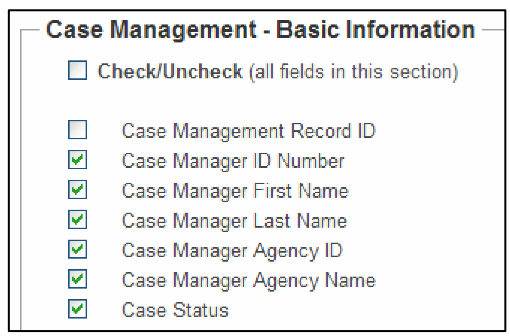
Steps for creating a KAT caseload report:

1. Select "Start Export"

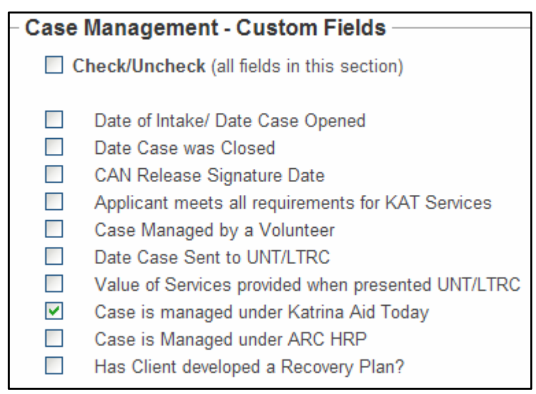
2. Select (mark the check boxes) the criteria you wish to report on and then select "Next Step." Consider reporting on client demographics, case management information and case closure information. **Criteria that must be selected**:
   a. Client ID



   b. Case Manager Agency ID



   c. Case is managed under Katrina Aid Today



Note: Any field from CAN's Client Records can be selected to generate reports. Keep in mind though that the more you select the more complex your resulting report will be. Select feeds that are helpful to the purpose of your report. For example, if you want to create a report about clients your agency works with, select predominantly client information. If you want to create a caseload report to understand case management trends, select fields that describe the process (like case status) or case manager identifying information, etc.

3. Prioritize your columns of the report or simply select “Next Step.”

4. Set your criteria using the following and only report on cases managed under the Katrina Aid Today program by your agency. For the “criteria value” of the “Case Manager Agency ID,” use your Agency ID (numbers only). Select “Next Step.”

Criteria Group: 1

Logical Connector	Field	Criteria Operator	Criteria Value
	Case is managed under Katrina Aid Today	begins with	x
AND	Case Manager Agency ID	=	<Insert your agency's ID>
AND	*	equal to	
AND	*	equal to	

Note: If you don’t know what your “Case Manager Agency ID” is, refer back to the number entered into the former field “Affiliated Agency ID” or to the field now found in the case management section of a client record that is listed following the assigned case manager’s name and the agency’s name.

Note for running multiple agency reports at the same time: Set the Criteria Group 1 to be a succession of “Case Manager Agency ID” “=” “<Insert your agency ID>” using “OR” between each entry. If all spaces are filled in the first group, click on “save criteria” to prompt new fields to be added to the group. Select “Case is Managed under Katrina Aid Today” “begins with” “x” under the second criteria group.

5. Indicate the sort order or simply select “Export.”

6. The report will be generated in the format of a text file. Select all in the text file, copy and paste into an Excel workbook.

Explaining missing or extra client households in your caseload report:

- Does your caseload report only list head of households? KAT only tracks households. The only person who should have the field “Case is Managed under Katrina Aid Today” checked should be the head of a household. Family members should not have this box checked.

- Does ever household in your caseload have the field “Case is Managed under Katrina Aid Today” checked? This field should be checked for all head of households for households that are provided case management under the Katrina Aid Today program.

- Does every household in your caseload have a case manager assigned? If there is no case manager assigned, this report will not show these clients because it is created based on case manager assignment.