

Revised: June 20, 2007

Program Management with CAN: *Monitoring, Improving and Reporting with the Coordinated Assistance Network*

CAN (Coordinated Assistance Network), the coordinated database of Katrina Aid Today (KAT), has great capacity to assist program and case manager supervisors in the management of their KAT operations. While case managers or data managers may have the primary interface with CAN in your program operations, program and/or case manager supervisors should gain individual access to CAN so that they can benefit from its management capabilities.

Weekly entry in CAN – at a minimum – is required of agencies participating in Katrina Aid Today per grant agreements. This regular entry enables program and case management supervisors with a single source of up-to-date information on the services and case management provided under their KAT program. CAN's Client Registry Database; Agency, Program and Services Resources Database; and the enhanced Export Tool can all be used to monitor and report on your KAT case management program.

Managing caseload vs. workload:

Section in CAN: Client Registry "Case Management Search"

Management Utility: CAN's "On-Line Support Assistant (OLSA)" includes a search feature that enables searching by case manager name to develop lists of CAN client records that have been assigned to a particular case manager, which may be helpful in supervision.

Recommendations:

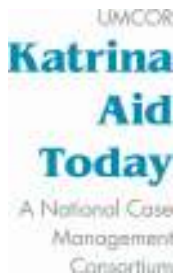
- If your agency uses an independent spreadsheet or similar document to monitor caseload, this list may be helpful in verifying and/or explaining discrepancies in the list generated by the "Case Management Search."
- Keep in mind that some of the cases listed as assigned to case managers may be household members and are not counted as individual KAT cases.

Spot checks of CAN entry:

Section in CAN: Client Registry "Case Management Search" and Client Records

Management Utility: From the list of cases generated by your search through the "Case Management Search" feature, you can access client records to ensure that case management services and information have been properly entered into CAN. Refer to the client paper record as a source of information. Spot checks can also help identify areas for training case managers in CAN use.

Recommendation: Refer to KAT Guidance #10, Cleaning CAN Data for fields in CAN to verify.



Revised: June 20, 2007

Program Management with CAN: *Monitoring, Improving and Reporting with the Coordinated Assistance Network*

Agency Reporting of Services Provided:

Section in CAN: Resource Database and/or Client Records

Management Utility: Searching CAN's Resource Database will inform you if the services provided by your agency have been registered with CAN. Looking at the Contact History of a client record will inform you if services provided have been reported in CAN. Reporting services provided by your agency or referral demonstrates the "value added" aspect of case management.

Recommendations:

- All services provided by your agency should be reported in CAN. Refer to KAT Guidance #17 for options for registering services in CAN so that they can be tracked in the client record.
- For services registered by your agency in the Resource Database, recommend that the following be verified:
 - Is the service labeled clearly and easy to identify? (i.e. services should not be labeled with your agency name or service types such as "disaster assistance")
 - Does the registered service include only one type of service? Services such as "basic needs" should be broken into separate services such as housing, food, health & well being, and financial.
 - Does the service have an indicated unit and value? Refer to KAT Guidance #8 "Valuing Services."
 - Has your agency, program and services registration been updated recently? Programs and resources change rapidly in the non-profit sector and should be updated accordingly in the Resources Database so that only available and current services are searchable. Recommended that updates occur monthly.
 - If you've answered "YES" to all of the above, you're on your way. If you answered "NO" to any one of the above items, work will be necessary to improve the registration of your services.

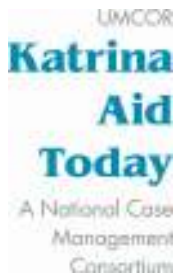
Running agency reports

Section in CAN: Export Tool

Description: CAN's Export Tool enables agencies to run their own reports so that individual agencies can monitor and verify complete representation of the work that is completed by case managers with regards to fields in CAN that KAT requires, rather than depending on the quarterly reporting of the consortium total and partner totals.

Recommendations:

- Agencies interested in running their own reports need to identify and train a staff member through CAN's online training "Export Wizard Report Tool."
- CAN's enhanced reporting tool empowers agencies to report on any/all fields simultaneously with relative ease without the use of Microsoft Access. Simply check the fields of interest and a report is generated based on the "qualifiers" you identify. The report form will resemble a



Revised: June 20, 2007

Program Management with CAN: *Monitoring, Improving and Reporting with the Coordinated Assistance Network*

Microsoft Excel spreadsheet that allows for sorting, counting fields of interest and quantifying totals. Contact info@katrinaaidtoday.org to request a copy of KAT's Report Recipes to aid program managers in generating standardized reports.

- By running a report based on your affiliated agency id, case manager name and/or other fields of interest, you can identify areas for CAN "clean up." This clean up will improve the reporting of your agency's case management services. Refer to KAT Guidance #10 "CAN Clean Data" for fields of interest to include in "clean up" reporting. Once a report is generated, it is helpful to highlight the "missing" fields and distribute the information according to case managers for follow up and entry of the information in CAN. One example of a report that could be used for CAN clean-up and case management is a report that includes case closure information. By running a report with this information you'll be able to track when and why case managers are closing cases and possible trends in improving the closure procedures in your agency.
- Generating an agency specific report has great potential to inform your work as well as build capacity for future work. Reporting on the scope and depth of case management under your agency's Katrina Aid Today program will inform your case managers, staff, board and other stakeholders on the impact you are having with clients and the nature of the services you are providing. It will also be helpful for supervisor-case manager supervision as reports can be generated to identify the complexity of cases. Additionally, generating reports from CAN may be helpful in providing quantitative support to future funding requests in that it demonstrates the capacity and service of your agency to meet client needs effectively. Refer to the KAT Quarterly Report Template for a reporting format suggestion.

Use of CAN requires registration: http://can.org/casemanager_access.htm

Register and access CAN online training: <https://katrina.communityos.org/core/dates.taf>

KAT Guidance, Advisories and Templates: <http://www.katrinaaidtoday.org/partners-resources.cfm>