

# CSTS for Sups

*This presentation will cover the use of live data reports that have been developed in Blue Earth County.*

# Background/Overview

- ▶ History - Heard about Human Services utilizing SSRS reporting
- ▶ Use of canned CSTS reports and ad-hoc reports - is there a better way?
- ▶ Specialized reports for managing caseloads/workloads
- ▶ Obtaining useful data and statistics for our agency(advisory board/comp plan)
- ▶ Quality Assurance - transfers, CCP's, LSCMI's, discharges
- ▶ Helps agents manage tasks with large caseload
- ▶ We have the ability to design based upon needs - document, conditions, agent work, fees
- ▶ Led to monthly reports - staggered sentences, case expirations, overdue assessments, CD assessments, POR

# Use of canned CSTS reports and ad-hoc reports - is there a better way?

- ▶ Previously printed out monthly reports for agents - case rosters, expiration reports, staggered sentence reports, case review reports, etc.
- ▶ Resulted in 100's of pages of paper being printed monthly.
- ▶ We were minimally using ad-hoc reports - difficult to create, and we were not experienced with advanced use of excel.
- ▶ There wasn't an ability to drill down or customize some of the information we were looking for.
  - ▶ Example report - Risk assessments not completed within one year
  - ▶ Early Discharge Report

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GROUP SUPERVISION REPORT:
DECLARE @today DATETIME
SET @today = GETDATE()
SELECT DISTINCT
    CC.CaseID
    ,CC.ClientID
    ,CC.Case_Number
    ,CC.Sentenced_Date
    ,CC.Expiration_Date
    ,CC.Offense_LevelID
    ,CL.Name_Last + ', ' + CL.Name_First AS Client_Name
    ,SU.Name_Last + ', ' + SU.Name_First AS Agent_Name
    ,MAX(CRA.Assessment_Date) AS LastAssDate
    ,MAX(CRA.Assessment_Score) AS AssScore
    -- ,sta.Case_ServiceID
FROM dbo.tblClient_Cases AS CC
    INNER JOIN tblCondition AS C ON CC.CaseID = C.CaseID
        AND CC.ClientID = C.ClientID
    INNER JOIN dbo.tblAgent_Work AS AW ON C.CaseID = AW.CaseID
        AND C.ClientID = AW.ClientID
    INNER JOIN dbo.tblClient_Risk_Assessment AS CRA ON AW.ClientID = CRA.ClientID
        AND AW.ClientID = CRA.ClientID
    INNER JOIN tblClient AS CL ON CRA.ClientID = CL.ClientID
        AND CRA.ClientID = CL.ClientID
    INNER JOIN dbo.tblClient_Agents AS CA ON CL.ClientID = CA.ClientID
        AND CA.End_Date IS NULL
    INNER JOIN dbo.tblSystem_User AS SU ON CA.System_UserID = SU.System_UserID
    INNER JOIN dbo.tblClient_Supervision_Level AS CSL ON CL.ClientID = CSL.ClientID
    INNER JOIN dbo.tblRef_Supervision_Level AS RSL ON CSL.Supervision_LevelID = RSL.Supervision_LevelID
    INNER JOIN tblCase_Status sta ON sta.CaseID = CC.CaseID
        AND sta.Case_ServiceID NOT IN ( 9, 62,
            26, 61, 51, 52 )
        AND sta.End_Date IS NULL

WHERE C.End_Date IS NULL
    AND ( CC.Sentenced_Date IS NOT NULL
        AND CC.Expiration_Date IS NOT NULL
    )
    AND RSL.Code IN ( 'LFP', 'LMA', 'LMM', 'LMP', 'LMT', 'LFE', 'LFT',
        'LFI', 'LMS' )
    AND SU.System_UserID NOT IN ( 89, 8, 92, 17, 14, 93, 61, 18 ) --Agents to not include

--Supervision Level Codes from tblRef_Supervision_Level:
--Low Felony
--Low Felony Paper
--Low Felony Transfer
--Low Felony Instituti
--Low M/gm Paper
--Low M/gm Transfer
--Low M/gm Minimum
--Low M/gm Suspended
--Low M/gm Administcat
    AND C.Condition_CodeID <> '60' --Cd Evaluations

```

# Specialized reports for managing caseloads/workloads

- ▶ Ability to drill into reports without having to run multiple CSTS reports
- ▶ Customize the data based upon importance
  - ▶ Resource allocation
- ▶ Run reports based upon document type
- ▶ Assist agents with outstanding referrals
  - ▶ CD assessments
  - ▶ Cog Skills
  - ▶ CD Education programming

# Obtaining useful data and statistics for our agency(advisory board/comp plan)

- ▶ Juvenile Truancy and Diversion Cases by Month
- ▶ Bail Studies
- ▶ Pre-Sentence Investigations
- ▶ Violation Reports
- ▶ Overdue Risk Assessments
- ▶ Overdue Fees
- ▶ Client demographics

# Quality Assurance - transfers, CCP's, LSCMI's, discharges

- ▶ Allows cases to be transferred in a more timely manner
- ▶ Leads to early discharge based upon policy
- ▶ Data entry by agent - Client Contact Plan, Risk Assessments, Supervision Level
- ▶ Expiration Reports(closing counts that are expired)
- ▶ A&D's by agent
- ▶ Quality Assurance for Clerical
  - ▶ Expiration Dates
  - ▶ Stay Types

# Helps agents manage tasks with large caseload

- ▶ CD evaluations outstanding
- ▶ Substance Abuse Referrals
- ▶ Staggered Sentences and EHM
- ▶ Early Discharge Report
- ▶ Transfer Cases
- ▶ Open Restitution

# Led to monthly reports

- ▶ Staggered Sentences
- ▶ Case Expiration
- ▶ Overdue Assessments
- ▶ POR list
- ▶ CD assessments
- ▶ Monthly Roster Report

# Benefits

- ▶ Quality Assurance
- ▶ More manageable caseloads
- ▶ Accountability of staff
- ▶ Statistics
- ▶ Dashboard look and shared viewing.
- ▶ Access to live data
- ▶ Less printing

BUT, WHERE DO WE GO FROM HERE????

# Contact Information

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