LodeStar "Canned" Reports

WHAT they show - WHEN to run - HOW to run

In addition to the powerful Ad Hoc reporting system, LodeStar has a number of built-in "canned reports" that can be very useful to management and staff. This short manual will help supervisors determine how best to use these "canned reports" found in LodeStar. The manual provides succinct descriptions of each report in the LodeStar Reports module, including what the report can show, how it is used and when to run it. We hope you will find it to be a useful tool.

Each of the canned reports opens with a screen that gives you choices as to what will be included in the report. All of them allow you to choose the dates for which the report will be run. Most of them also allow you to choose whether to run the report for all Case Managers, a certain range of Case Managers or one particular Case Manager. Many of the reports allow you to choose which pay sources to include in the report. Several reports also give you choices in determining how the report is sorted. Depending on the report there may be other choices possible in the opening screen.

Please understand that the reports are only as valid as the information your agency staff enters in to Lodestar. All forms must be filled out on clients and entered in to Lodestar in a timely manner to give you the best information.

Client Lists

The **Billing List** creates a list of all clients who are considered "billable" (active at least one day) during a month. The report gives the SSN, case #, client ID, client name, ending status, status date and reason for status change, if any, and Case Manager Code. This report was originally developed for the Cal Learn program, but is now available for all funding sources. This list should be run once for each pay source desired, immediately after all of the Client ID and Status Change Forms have been entered for the previous month. Give to each Case Manager to verify that each client listed was case managed. If there are any corrections, make sure they are data entered before making the monthly transmission to Branagh Information Group for the state. This list can be exported to Excel, ASCII or any of four other formats.

When to run: monthly or as requested by county DSS.

The **<u>Client Roster</u>** is a list of clients for the reporting period who have the status(es) chosen in the initial screen. The default choice is Active, Waitlisted and Outreached clients. You have the choice to group by Case Manager or agency wide. Information on this list includes the client name, SSN, client ID, Case #, birth date, age, index child name, birth date and age, first status date, DOB of non-index children, up to two phone numbers, mailing and home address if different, AU head if not client, current status and 90 day start and end dates.

When to run: monthly and as needed.

The **<u>Contact Log</u>** is a list for each Case Manager of all of their clients, who have status as checked in the initial screen, with spaces to enter the date, time and type of each contact with the client. It is printed out at the beginning of each month and given to the Case Manager to enter the contacts during the month. Clients who enter later in the month are written in at the bottom of the list and contacts entered. At the end of the month the Case Manager gives the list to the person who will data enter it into LodeStar's Contacts Module. This information then can be reported in the <u>Client Contact Summary Report</u>, detailed below, to show what type and amount of contacts the Case Managers each have with their clients. It is required for all AFLP agencies. As of Lodestar version 13.3 there is a new date column in the log and it is important to enter the actual date of each contact in the Contacts Module. Dates will not show in the Contact Summary Report but will be used for requirements in the Scope of Work Report.

The Contact Log now includes revised codes to document work a Case Manager does with clients on the My Life Plan Forms and Modules for those AFLP agencies using the PYD program. These will also be entered in the Contacts Module and are available as a separate page at the end of the Contact Summary Report.

When to run: beginning of each month.

The **<u>Follow-ups Due Report</u>** is an extremely important tool to help Supervisors make sure all client forms are filled out and entered into LodeStar in a timely way. It also includes an option for reminders of client birthdays. If you choose to leave default dates in the opening screen, the report will show forms not entered into LodeStar in the past two months and forms that will be due during the next month. It will also show ANY Intake or Pregnancy Outcome not done for a currently active client, no matter how long ago it was due. Intakes are especially important because the index child's EDC or DOB entered there determines when any Pregnancy Outcome or Follow-up forms are due. You can also choose any date range and it can be very useful to run this report for the past six months or more to see what forms have been missed. Once the form due is entered into LodeStar, it no longer shows up on this report.

You can choose which forms and reminders to include in the report. Forms that relate only to one program show as due for clients only in that program. Forms which may be included in the report for all clients are Intakes, Pregnancy Outcomes and Follow-ups. Birthdays are also shown for all clients. Any AFLP client who is 19 years old or older AND has been in the program

24 months always shows as the 19 and 24 rule no matter what else is checked. Forms or dates that are specific to Cal-Learn clients include the Exempt/Deferred review dates, Report Card Schedule CL-8s, Report Card due dates, a reminder to schedule Orientation, and a reminder to continue to try to locate the clients and complete forms for those clients who have been non-participatory. If you track report cards for AFLP or another program and fill out the Report Card Schedule, Report Cards due will also show for those clients. Since AFLP now requires ISPs and CBAs to be documented in the Contacts Module, the AFLP Baseline Assessment / Annual Assessment and Quarterly ISP reminders will show, and now will be removed when documentation is entered appropriately timely into Lodestar.

You can choose whether to list the clients missing forms only under the current Case Manager, or under the Case Manager the client was with when the form was due. You can also choose whether to list only currently Active clients. The report shows all clients who have something due, grouped by Case Manager. The report gives the client's ID, name, status and program, index child birth date and first name, form or action due, and the date due. Once the form due is entered into LodeStar, it no longer shows up on this report. The client's phone number is on the list to facilitate contact.

A separate **Summary** report simply lists all Case Managers and the number of items they have due.

When to run: at least monthly for the default date range of two months prior to one month from now. Run every quarter for the date range of six months ago to today to see how many forms have been missed.

The **Length of Enrollment** report gives you the same information as the Client Roster for active or deferred clients and adds a calculation of the number of days enrolled for each client as of the date the report is run. If you run the report for a previous date range it will give you those clients who were active or deferred for those dates, but the calculation of the number of days enrolled will still be as of the day you ran the report for everyone still in the program. If someone who was active during that previous date range is now no longer enrolled, the number of days enrolled will be calculated as of the day the client exited. Some clients go in and out of one or more programs more than once. Only the total number of days that the client was active in Lodestar will be shown in this report.

When to run: as needed

The **School Roster** lists all active or deferred clients, tells whether they are in school or not and gives the name of the school if that is entered in LodeStar. This information is based on the most recent form entered into LodeStar. The report can be grouped by school or by Case Manager. If the list is grouped by Case Manager, it will have a secondary grouping by school within each Case Manager's list. The list includes the client's name, SSN, Case Manager, form date, whether they are in school or not, school name, the program name, and their current status. If the report output is grouped by school, the first list will be of clients with no school listed. Most of the clients on this list are not enrolled in school. Case Managers can check this list to find clients who are listed as enrolled but have no school listed, so they can correct the entry in LodeStar. A separate **Summary Report** gives total number of clients, the number enrolled in school, the number of those enrolled who have the school code entered and the number with no school code, and the number of clients who are either not in school or their school status is unknown.

When to run: as needed

MCAH Key Data

Annual Reports – consists of two different reports, one with birth statistics and the other an analysis of service referrals. These reports were specifically designed to match the annual reports MCAH requires for AFLP clients, but can provide useful information for Cal-Learn clients as well.

The **Birthweights and Gestation Report** is a one page report that compares births from teens enrolled in your agency, during the time frame chosen, to statistics for a recent year of births from all AFLP clients and births from all teen parents in California. Statistics are given for the numbers and percentages of low birthweight, very low birthweight, preterm delivery and very preterm delivery births. If you check the Repeat Births box, statistics will also be given for numbers and percentages of repeat births, which is defined as any child born after the index child while the client is active in the program, for clients who have been in the program a year or more.

The **Service Referral Analysis** is a two part report which analyzes the service needs, referrals and usage of services listed on the Service Matrix during a given time frame, with the list of services sorted by need. One report gives the numbers of clients and the other gives the percentages those numbers represent. The first few columns of the reports show numbers or percentages of clients needing the service or not. The second group provides the number or percentages of clients who needed the service and who were either receiving at intake or were referred and received the service or not, or were not referred. The next group gives the number or percentages of clients who were referred but did not receive the service and the reason given why not. The final group gives the number or percentages of clients who were not referred and the reason given for no referral. This report can be exported to Excel.

When to run: as needed.

Three **<u>Demographics Reports</u>** give information about the clients' age, ethnicity, and pregnancy, marital, school and work status at enrollment. Totals for the agency are shown first and then broken down by Case Manager, listed alphabetically by first name. Only clients with intakes are able to be counted for demographic purposes. You can choose date range, some or all funding sources, some or all Case Managers, the status of the clients and whether you want to limit the report to only female clients.

Demographics Part 1 gives the number of clients with intakes and without intakes, the number and percentage of clients at each age at enrollment and halfway thru the chosen report dates, as well as the ethnicity of clients who have intakes.

Demographics Part 2 again gives the number of clients with and without intakes, and gives the number and percentage of clients' in each marital status and pregnant/parenting status at enrollment, and trimester at enrollment for those who were pregnant.

Demographics Part 3 again gives the number of clients with and without intakes, and shows the number and percentage of clients in school or not, their last grade completed and their work status at enrollment.

Making sure you have done Intakes on all your clients is important because, in addition to all of the other information on that form, it contains the EDC or DOB of the index child which determines when a Pregnancy Outcome or Follow-up form is due.

When to run: as needed.

Four **<u>Progression Reports</u>** provide information on clients who have been in the program long enough to have a Follow-up form entered into Lodestar. Their index child would be at least 6 months old. Date range, funding source(s), Case Manager(s), status and whether to limit to female clients and/or allow follow-ups entered after the date range can be chosen for each report. Agency totals are given at the top of the list and it is then broken down by Case Manager.

Progression Part 1 tracks sexually active clients' contraceptive use at enrollment and Follow-up. It lists the number of Follow-up clients and how many of those were sexually active and then what percentage of those were never using, sometimes using, or always using contraception when the Intake was done and then when their most recent Follow-up was done during the chosen date range.

Progression Part 2 tracks clients who were pregnant at enrollment and sexually active at their last Follow-up in the date range. It shows the total number of clients who had Follow-ups during the time frame and the number of clients pregnant at enrollment and sexually active at Follow-up, then gives the percentage who never use, sometimes use and always use contraception at the most recent Follow-up done in the date range.

Progression Part 3 gives information on Pregnancy Outcomes done during the date range chosen. The number of live births are given, then the percentage of clients who had no prenatal care, or started prenatal care in their first, second or third trimester or their prenatal care was unknown. The next group gives percentages of clients with low birth weights, normal birth weights or unknown birth weight. The last group gives percentages of preterm births, normal births and unknown number of weeks' gestation.

Progression Part 4 provides information on school status of clients at enrollment and most recent Follow-up done during the date range, grouping the clients into those under 18 and those 18 and older. For each group it shows percentages of clients that are in school, not in school, HS graduate or equivalent, or of unknown school status first at enrollment and then at Follow-up.

When to run: as needed.

The **Scope of Work Report** is a 3 page report that takes information from various existing Lodestar forms as well as two Freecodes and the Contacts Module to answer 40 outcome measures to be reported in the Annual Report as listed in the AFLP Scope of Work. The information is also helpful for other reports an agency might need to make and can be done for Cal Learn or Other programs as well. Two additional pages of Explanatory Notes show you what was used for the denominator and numerators to create each of the outcomes.

When to run: Annually for the Annual Report and as needed throughout the year.

Management Summary

The **Caseload Analysis Report** was originally designed for Cal-Learn but is useful for AFLP as well. It helps you make sure you are not assigning too many clients to your Case Managers by tracking changes in the caseload for each Case Manager for the time specified, usually one month. For each Case Manager, the report gives beginning and ending caseloads for AFLP and Cal-Learn, the number of clients made active, exited or changing Case Manager in those programs, and the number of Waitlisted and Outreached clients for AFLP within the time frame. These numbers are calculated using data from the Status Change form. You can now check Detail in the opening screen to see a list of clients counted in this report. This report differs from the "Months of Service" report in that it gives snapshot in time for the exact number of clients each Case Manager has at the beginning and end of the date range given and the total number of clients gained or lost during the time period by each case manager. The Months of Service report in contrast looks at "Client-Months" handled by each case manager. See the Months of Service Report section below for more information on that report.

When to run: monthly and keep a copy on file.

The **Child Immunization Report** shows the number and percentages of clients' children who are up to date or not up to date with their immunizations for a given time period. This report is usually run for a full quarter and includes all client forms received from the 1st of the starting month through the last day of the ending month. This report was designed to match the Quarterly report that MCAH runs on all AFLP clients.

When to run: quarterly.

The **Client Contact Summary Report** provides an excellent way for supervisors to track the type, number and length of contacts their Case Managers make with clients. This is a required report for AFLP and optional for Cal Learn. For each Case Manager, the detail report lists all clients for the reporting period who have the status(es) chosen in the initial screen. The default choice is Active, Waitlisted and Outreached clients. Within each client's row, the total time (in 15 minute increments – shown as 0.25/0.50/1.25/etc.) and total number of contacts is shown in the column of each contact type. Beneath the value for number of contacts completed is the number attempted but not completed for each type. Total numbers of contacts, attempts, the time for each type, and a grand total of all contacts, attempts, and time is shown at the end of each Case Manager's client list. A summary page shows the total contact hours, number of contacts made and number of attempts made for each type of contact for the whole agency during the reporting period chosen.

A separate page documenting work a Case Manager does with clients on the My Life Plan Forms and Modules for those AFLP agencies using the PYD program can be chosen to open after the Contact Summary report closes

When to run: monthly after all contacts for the previous month are entered. Note: the contacts module was originally designed for Cal Learn, and is now mandatory for AFLP.

The **Comparison Report** shows how clients score on any chosen data item over 3 or 6 month intervals of their enrollment in AFLP, Cal-Learn or other programs. Rather than track a specific client, this report gives the number and relative percentages of clients who have been enrolled for the specified length of time and who fit each category of a data item at each interval. The total numbers of clients who have been enrolled in the program for each time interval are listed at the bottom of the interval columns. Supervisors may use this report, for example, to determine whether efforts to encourage contraception use or smoking cessation have been successful. Please note that as clients gain more trust in their Case Managers they tend to answer questions more truthfully, and this can sometimes make it look like clients were doing better at intake compared to later follow-ups than they actually were.

When to run: as needed for specific data items.

The **Months of Service Report** provides a way to track how your agency's actual months of service compares with your allocated months of service. The report can be run for one or more months' time. It shows a list of Case Managers with the months of service for each case manager for the chosen reporting period, fiscal year to date and projected fiscal year by program (AFLP, Cal-Learn or Sibling) and totals. A section on the final page gives the expected and actual totals, the variance and the percentage variance for AFLP contract compliance for this period, the fiscal year to date and projected fiscal year. A similar section for the Sibling program is not currently in use. The Months of Service report, in contrast to the Caseload Analysis Report, looks at "Client-Months" handled by each case manager. So if a Case Manager had six clients and the MOS report was run for a three month period the case manager would show 18 (6x3) Months of Service. Up to two months of service can now be awarded automatically for Outreach clients who become Active. You can now check Detail in the opening screen to see a list of clients included in the MOS and their statuses. For another way to look at caseloads, see the Caseload Analysis Report, above.

When to run: monthly

The **Other Caseload Analysis** helps you track changes in caseload for Case Managers who work with programs listed in LodeStar as Other 1, 2, 3, 4, 5, or 6 if you include any such programs in LodeStar. The format is similar to the original Caseload Analysis Report.

When to run: monthly

The **Other Months of Service Report** allows you to track programs listed in LodeStar as Other 1, 2, 3, 4, 5, or 6 if you include any such programs in LodeStar. Tracking is similar to the original Months of Service Report.

When to run: monthly

The **Stat 45 Report** is a report required by the Department of Social Services for agencies who work with the Cal-Learn program. The summary report is printed on a form that was originally the form to be submitted to the state. Now the information produced in Lodestar must be transferred to the current state form and must be submitted to the state each month. The information is automatically added to the form from data entered previously into LodeStar from the Status Change Forms. Part A gives an overview of the movement of students in and out of the Cal-Learn program over the month. This includes clients carried forward from the last month, those who were assigned Cal-Learn status during the month, those who became exempt, or who were discontinued, and the total carried forward to the next month. Part B shows numbers of teen parents who may have become exempt, deferred or discontinued and the reasons why. Part C D and E are sections that are not automatically completed by LodeStar at this time.

The **Stat 45 Detail Report** provides a list of all clients for each line of Part A. Information in each list can include their SSN, CWD case #, Client ID, name, status, status date and (if they are exited, exempt or deferred) the reason for the status change. This detail report can be exported to Excel, ASCII or four other formats. You can choose to print the detail with or without Social Security numbers.

When to run: monthly. One copy of the summary form goes to Department of Social Services and one copy should be kept in your files.

The **Unduplicated Client Count** is a report which shows the number of clients who participated in each program within the date range and the total number of clients served. The total number of clients served may not be the sum of all of the program totals because it counts a client only once even if the client moved back and forth between programs.

When to run: as needed.

L.A. County

These reports were developed to facilitate reporting from agencies within L.A. County to the L.A. County Department of Social Services, but other agencies may find useful information in the reports.

The **L.A. Case Assignment Report** allows Supervisors to print any or all of the following forms when new clients are assigned to a Case Manager: a client ID form, Orientation/ Participation Problem forms, CL-8, Report Card Schedule/Outcome, Cal-Learn Initial Progress Note, and labels.

When to run: as needed

The **LA Performance Measures** is a series of reports designed to provide LA County DSS with data to track the success of Cal-Learn programs in the agencies within that county. Among other things it provides data on numbers and percentages of Cal-Learn clients who were scheduled for and attended orientation, who were enrolled in school and attended, who submitted report cards due, and who graduated or aged out after completing 11th grade. The reports can be run for one month or for the current semester. If the report is run for a semester, prior to the end of the semester, it will show only the number of months completed so far within the semester. The semester report is based on September as the beginning of the school year.

The one page **Summary** report has two main sections. You must check Summary in the Report Output section of the initial Performance Measures screen in order to receive this report. The first section is the Supplemental Monthly Management Report which gives the number of Cal-Learn clients who became ineligible, the total number of Cal-Learn clients who have completed orientation, the total number who are enrolled in school, the total number who have completed only 11th grade and not graduated, the total number who graduated within that date range and the total number of orientations scheduled within the date range.

The second section of the Summary report is the Board of Supervisors Functional Specifications: Part A. The first line shows the number of clients active within the date range, minus any erroneous referrals. This is followed by four groups of information.

A1 The first line of this group shows the percentage of clients who attended orientation. This percentage is developed by numbers on the following two lines. The numerator is the number of clients who are active and who both scheduled and completed the orientation within the date range, including ones done late. The denominator is the number of clients who scheduled an orientation in that date range, including ones done late. Additional lines in this section show the number who were scheduled but did not attend, the number of late shows, the percentage of clients who attended orientation if late ones are excluded, and the number of clients who had a scheduled orientation but were erroneously referred.

A2 The first line of this group gives the percentage of all currently active Cal-Learn clients enrolled in school. The numerator for that figure is the total number of active clients enrolled in school during the date range. The denominator is the total number of active clients in the date range who had completed orientation.

A3 The first line of this group gives the report card submission rate in the date range. The numerator is the number of active clients with report card submitted in the date range. The denominator is all Cal-Learn clients enrolled in school with a report card due in the date range. Additional lines in this group show the number of report cards submitted that were late (due before the chosen date range) and the submission rate if late report cards are included in numerator and denominator.

A4 The first line gives the percentage of Cal-Learn clients eligible for graduation who actually graduated. The numerator is clients who passed the GED or graduated in the chosen date range. The denominator is Cal-Learn clients who had finished 11th grade and either aged out, passed GED or graduated. Note that the date range used for the graduation rate is entered separately and is usually September 1st to now, which is different from the date range used for the rest of the report.

Detail reports are available for each of the line items if checked in the initial screen under Detail. Detail reports list each client applicable in that line item and show SSN, Date orientation was scheduled, whether they attended and the date attended, and their 90 day participation start and end dates. Depending on the line item, the list may show their school status, last grade completed, exit date and reason for exit. Clients are grouped by CM in these lists. Detail reports can be run without the Summary report. The detail lists can be exported to Excel.

The Summary report can also be shown by case manager if by CM is checked in Report Output along with Summary. This will show the percentages each case manager has for A1, A2, A3, and A4, and the numbers for each numerator and denominator. Checking "By CM" will also give you a list of case managers with the numbers of clients in each of the items in the Supplemental Monthly Management Report for each case manager.

When to run: monthly after all data has been entered for the previous month. May also be run at the end of the semester for semester totals.

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The **Data-Cleaning Reports** is an important tool that will tell you whether you have any errors in your data that need to be fixed before you send your monthly transmission to Branagh Information Group for the state. This report is automatically run the first time you run any canned report in any LodeStar session and before transmitting your data to the state. Errors that may be shown in this report are error flags in client forms, status inconsistencies, records with missing status values, or missing master records. If you click preview or print and the small red word Finished shows up, but nothing else shows, that means you have no errors that need to be fixed. If you have errors, one or more sheets will print out giving you information about what the error is and where to find it in LodeStar. If you are not sure how to fix the errors please call Tech Support at 877-329-4244. Please make sure to fix any errors before you transmit.

When to run: prior to any transmission to Branagh information Group