Policy No. 712	**Subject:** Caseload Management Report
Section: Other Policies and Procedures	**Revised:** 09/2016
Signature: Brandy McOmber, Resource Manager	**Version:** FINAL

1. **PURPOSE**

   The R-510 Caseload Management Report is used by staff to review progress and manage the caseload. The report includes information to monitor caseload activity and provides caseload analysis indicators in a statistical format. It allows the user to plan their case work activities, assess current progress of cases, as well as analyze the progress by staff assignment, area office, or the entire state. A static report is run the last day of each month and saved in IRSS. An interactive report can be run at any time from the Reports/Forms page in IRSS providing real-time data. Each office name and case owner name on the interactive report is a hyperlink allowing the user to drill further into the report.

   Report R510:
   The statistics are broken down into two pages. The first page includes data by case status. The second page includes data for the number of cases opened, eligibilities completed, plans for employment written, cases closed (by closure status), lapsed goal dates and lapsed comprehensive annual review dates.

   Page 1:
   Identifying Data: The reporting period is indicated at the top. At the state level, each of the area offices is listed down the left-hand side of the report. At the office level, each of the office case owners is listed.

   Caseload Data: Caseload figures are taken from IRSS. The bottom figure shows the total number of case files in each status. The top figure under each status shows the number of case files that have been in the status for a timeframe exceeding the indicated number of months in the header row. "Total" is the sum of all status entries.

Extensions: According to the appropriate status there are extensions listed. The bottom number represents the total number extensions for that status and the top number represents the number of extensions that exceed the timeframe.

SD: The bottom figure is the number of SD cases in status 10 and above in the caseload. The top figure indicates the percentage this number of SD's represent of the total 10-24 cases. The bottom of the page shows state totals when viewing the statewide report or office totals when viewing the area office report.

Page 2:
For each column, the top number represents the number of case files moved to the status during the course of the reporting period (RP) and the bottom number represents the year-to-date total (TD).

Assignments: The number of case files assigned to status 02.

Eligibility: The number of case files moved from status 02 to statuses 04 or 10.

IPE: The number of case files moved from status 10 to status 12.

Closure 08: The number of case files moved from status 02 to status 08; closed as an applicant prior to eligibility determination.

Closure 28: The number of files closed from status 28; closed after development of a plan for employment without an employment outcome.

Closure 30: The number of files closed from status 30; closed after eligibility but prior to a signed IPE.

Closure 38: This shows the number of files closed from 04; closed from an order of selection waiting list.

Closure 26: This shows the number of files closed 26; closed after achieving a successful outcome in competitive integrated employment.

26 SD% NUM: This shows the number of 26's that were designated SD.

Closure 331: This shows the number of individuals who have been closed from post-employment services maintaining their previous employment.

Closure 332: This shows the number of individuals who have been closed from post-employment services because the case file had been reopened.

Closure 333: this shows the number of individuals who have been closed from post-employment services with an outcome other than 331 or 332.

Lapsed Dates: The final two columns represent the lapsed goal dates and the lapsed comprehensive annual review dates.

Report R-510 A/B:
This report is used to assist supervisors and other IVRS staff in planning their work for the next time period. The top of the report shows the reporting period, and the case owner's name. Job candidate names are listed by status, and by status date chronologically showing which job candidates have been in that status the longest and probably need the most immediate attention.

The IPE monitor dates are provided to show when review dates are due. Those that are overdue are highlighted with an asterisk. An asterisk on a case in statuses 04 or 10 signifies that the case was moved to the status by presumptive eligibility and an eligibility decision is still needed. Additional information such as ticket status and permission to share data with SSA is included to assist staff in monitoring actions needed. This information is intended to guide the staff in preparing their work itinerary.

CSR300 Counselor Detail Report:

This report displays when the case owner's name from the R-510 A/B Report is selected. This report shows the case number, job candidate name and date of the following case events completed during the current federal fiscal year, including:

02-0: Cases assigned to status 02.

02-0 Ext.: Cases with an extension of the eligibility timeframe.

04-0: Cases moved to status 04 from status 02.

08-0: Cases closed from status 02.

10-0: Cases moved to status 10-0 from status 02 or 04.

10-0 Ext: Cases in 10-0 with an extension of plan development timeframe.

10-1: Cases moved to status 10-1 from status 02 04 04.

10-1 Ext: Cases in 10-1 with an extension of plan development timeframe.

26-0: Cases closed in status 26. This section includes employment information including the monthly wage, hours worked, hourly wage and employer name.

28-0: Cases closed in status 28.

30-0: Cases closed in status 30.