

REPORT DOCUMENTATION

REPORT

REPORT NAME

Texas ODM Fiscal Start (BOY) Child-Case Submission

REPORT SUMMARY

This report will list all active Cases and Children and their demographics who had an assigned Supervisor and/or Volunteer at the start of the fiscal year. Use to populate Texas CASA's ODM BOY Child-Case Submission

Regarding opening new cases: the **Petition Date** (at the top of the Case Details page, will be called *Case Start Date* in the future), **Case Assigned Date** (the first CASA person, generally staff but could be a volunteer, Assigned Date), and **Assigned to Program Date** (for child(ren) **should generally all be the same date**. There are circumstances in which these dates may differ; however these dates must all be in the same month in order for Texas ODM Reports to run correctly.

REPORT FORMULA

Items are selected when they meet the following criteria:

1. The case has a petition date earlier than the fiscal start date of the report and the case is not closed or is closed after the fiscal start date of the report. (The date field used is the field labeled 'petition date' at the top of the case details page in the Case Information section)
2. The child has an assigned to program date earlier than the fiscal start date and the child is not closed OR the child is closed after the fiscal start date
3. The child has a selected eligible status
4. Supervisor and/or Volunteer is active on the child during the reporting period

EXCEPTION REPORTS TO RUN BEFORE RUNNING THIS REPORT

1. Open Children - Missing Assigned to Program Date - by Supervisor
2. Assigned Supervisor (Paid Staff) - with No Assigned Child
3. Assigned Volunteer - with No Assigned Child
4. No Petition/Case Start Date

OPTIMA REPORTS TO RUN FOR DETAILED LIST OF CHILDREN & CASES COUNTED ON THIS REPORT

1. Active Children > Active – by Supervisor; run start AND end date of 8/31 AND eliminate all children/cases closed on 8/31 (Closed Children > Closed Children, run start AND end date of 8/31 and subtract the total number of Closed Children from Active Children report)
2. Active Cases - by Supervisor (located in Cases/Children – Case Statistics)