

**TOOLS FOR STAFF TO MONITOR ADVOCACY**

I need to know:	Report Name	Helpful Tips
<p>How to check what Activities or Contacts have been made on my case in a date range</p>	<p><b><i>For Activities Completed:</i></b> Activity Types by Case</p>	<p># of all Activity Types completed and approved in the date range.  Supervisor can run for one or all their cases at once.</p>
	<p><b><i>For People Contacted:</i></b> Contact Logs – Case Contacts – by Supervisor</p>	<p>Names of persons / Activity Type / Contact Type entered on all Contact Logs completed and approved in the date range. Supervisor can run for one or all their cases at once.  <b><i>(These two reports will be in reference to the same contact logs, just different levels of detail)</i></b></p>
<p>How to check what Documents have been uploaded on my case in a date range</p>	<p>Document Types by Case</p>	<p># of all Document Types uploaded to a case file in a date range.  <b>See 2 example reports, one for just one quarter, and one for the entire case.</b></p>
<p>How to check what Active Cases are missing an Activity Type in a date range</p>	<p>No Children Visits – by Activity Type – by Supervisor</p>	<p>For the date range chosen, the Active Cases that are <b>missing</b> the Activity Type chosen.  Run these for <b>ONLY</b> one Activity Type at a time.  The second report is the exact same thing as the first, except adding the Contact Type as well. Suitable for checking any cases <b>missing</b> <u>Contact: Child Face to Face</u> especially.</p>

TEXAS CASA CUSTOM REPORT TIP SHEET

**TEXAS ODM / FEDERAL GRANT REPORTS**

I need to know:	Report Name / Support Sheet	Helpful Tips
<p>How to fill out the ODM Beginning of Year (BOY) Reports</p>	<p>Texas ODM Fiscal Start (BOY) Case-Child Submission</p> <p>Texas ODM Fiscal Start (BOY) Volunteer Submission</p>	<p>Children, Cases, and Assigned Volunteers that are carried over from last fiscal year are counted on this report.</p> <p><b>Do not use 8/31 or 9/1 to do case clean up, it will cause problems with this report.</b></p>
<p>How to fill out the ODM Quarterly Reports</p>	<p>Texas ODM Quarterly Child-Case Submission</p> <p>Texas ODM Quarterly Volunteer Submission</p>	<p>Children, Cases and Assigned Volunteers that are opened or closed in the quarter.</p> <p>If a Volunteer was already counted on another case, they will NOT be recounted in this report.</p>
<p>My ODM Quarterly Report numbers aren't lining up!</p> <p><i>(Almost always this is an issue with Case Start, Child Assigned to Program, or Program Assigned to Case date)</i></p>	<p><b>For Case Start:</b></p> <p>Case Start / Petition Date</p> <p>No Petition / Case Start Date</p> <p><b>For Child Assigned to Program:</b></p> <p>Case Start / Petition Date</p>	<p>The number of children on each of these reports added together should = the number of children on the Active Children-All Alphabetical report for the same date range.</p> <p>The left hand column on this report shows the Case Start Date.</p> <p>The right hand column shows the child's Assigned to Program date.</p>
<p>How to fill out the CJD Report</p>	<p>Texas CJD Report</p>	<p>See the Tip Sheet for a line-by-line breakdown of the report, and including the #s to get from other places.</p>

TEXAS CASA CUSTOM REPORT TIP SHEET

**TOOLS FOR EDs / PDs / BOARD**

I need to know:	Report Name / Support Sheet	Helpful Tips
A quick look for Board at this month and last month's case numbers by County	Board Report	ONLY use this report as a snapshot – it is not designed for pulling historical numbers.
How many kids and cases are Volunteers serving?	Texas VCR (Volunteer-Case Ratio)	$VCR = \text{Cases served by Volunteers} / \text{Total Cases} \times 100$
	Texas PChV (Percent of Children Served with a Volunteer)	$PChV = \text{Children served by Volunteers} / \text{Total Children} \times 100$
What to turn in for annual VOCA desk audit	Texas VOCA Desk Audit	Use this report to accompany your VOCA desk audit each year – all case-related requirements are included!
How many Active Volunteers we retained over the last 2 years (QA requirement)	Texas 2-Year Volunteer Retention Rate	This report only accounts for <b>ACTIVE</b> volunteers only, regardless of whether they are <b>ASSIGNED</b> .
Do Volunteers have all the right documents in their personnel files (QA requirement)?	Document Types by Volunteer	It's helpful to pull this report as a quick way to check personnel files prior to QA review.
Staff-initiated and Volunteer-initiated Contact Log Summary of Activities and Hours	Texas Staff Contacts / Activity Summary by Date	This report counts all contact logs made by any staff member during the date range.
	Texas Volunteer Contact/Activity Summary by Date	This report only counts APPROVED contact logs completed by Volunteers in the date range.
Non-Portal Program cross-check reports	Texas Staff Contacts-Mileage by Date	These reports can be used by programs that are required to upload separate documentation into ODM each quarter.
	Texas Volunteer Contacts-Mileage by Date	