Caseload Manager Included Reports

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In addition to the general ability to select, sort and export data to Excel, Caseload Manager includes the following Reports:

Cases Needing Assignment:
The Cases Needing Assignment Report is a list of the Case Number and Case Notes for all of the cases that do not have a mediator assigned to them. The purpose of this report is to allow Case Administrators to see which cases are still open and available for assignment.

Service Report:
The Service Report can be filtered by a date range and shows a summary of cases by referral sources and case type.

Activities and Calendar Items Report:
The Activities and Calendar Items Report allows users to see totals for all activities and calendar items. These items can then be filtered by date range, case and staff.

Case Type Summary:
The Case Types Summary Report allows users to filter their cases by date range and Open/Closed/All. The report shows a breakdown of cases by case type, showing a total and a percentage.

Case Type Pie Chart:
This report displays all case types graphically as a pie chart.

Case Type Crosstab Report:
The Case Type Crosstab Report creates a spreadsheet that compares case types with case status or a custom case field. This report can be filtered by date, Closed/Open/All and the selected field. There is a summary of case type totals and percentages.

Referral Source Report:
This report shows a summary of case types by referral sources. It can be filtered by date range, and can include links to cases and show inactive referral sources. The report gives a total of each referral source and a

percentage total of sections.

Referral Source Pie Chart:
The Referral Source Pie Chart can be filtered by date range and displays the referral source information graphically in a pie chart.

Custom Field Case Summary:
This report allows users to view a report of Custom Case Fields that they have created. Users are able to filter by date range and select which custom case fields they would like to view.

Billing Report:
The Billing Report shows invoiced and paid items for each case. This report can be filtered by date range and can be exported. Totals are shown for Billed, Paid, Owed and (Override Balance Due).

Survey Summary Report:
If surveys are enabled on the Caseload Manager system and have been created, then an aggregate summary of each survey is available in the Reports menu. Surveys can be filtered by date range and can include links to individual surveys.

Deadlines Report
Users can see a summary of deadlines—items that are approaching or have passed a set deadline. If this feature is enabled, this report will show toward the bottom of the report menu.