

Instructions for Running and Using the Monthly FC Caseworker Visit Report

In order to access this report, you must be an authorized User of the Client Services Data Warehouse (<http://www.csdw.dhhs.state.nc.us/>). If you do not have access to CSDW, contact your local Information Systems Security Officer.

This report utilizes a State Sanctioned Query in CSDW. The query is designed to produce a report of children in foster care for a specific (Target) month, showing whether or not a caseworker visit has been recorded in the Multiple Response System (MRS) for each child. Only children who are in care for the entire month are included in the report. (If run for the current month, only those children in care from the first day of the month through the day prior to the day the query is run are included). In addition, children who turn 18 years of age before the last day of the month and those placed *into* NC through the Interstate Compact for the Placement of Children (ICPC) are excluded from the report.

For each child listed on the report, if at least one visit for the Target Month has been recorded in MRS, the date of the visit and an Indicator of whether or not the visit occurred in the residence of the child will be displayed. If no visit has been recorded for the child for the Target Month, the report will display one row of information for the child, with no Visit information (empty Date and Indicator fields).

The report is broken out by Worker Last Name, First and Middle Initial. For each worker's cases, a count of children (SIS IDs), Visit Dates and Visits is displayed. As a quick check, you can compare the SIS ID count to the Visit count; if there are fewer visits than SIS IDs, one or more children for that worker are missing visits.

To run the query:

1. [Log into CSDW](#)
2. If necessary, click on the 2nd icon from the left (next to the "Home" icon) on the Business Objects Main Menu bar (just under the word "Business") to display the Navigation Panel
3. If necessary, click on the "Folder" icon (1st icon on the left) to display the query folders
4. To navigate to the query, click on the "+" sign next to the following folders as they are displayed (each under the previous folder):
 - + Public Folders
 - + DHHS Main Documents
 - + DSS
 - + Child Welfare
 - + State Sanctioned
5. Then click on the folder icon or title for "CPPS/MRS Foster Care". The Foster Care Caseworker Visit queries will be displayed in the frame to the right.
6. Click on the query name "Monthly Foster Care Caseworker Visit Report for Select Month"

7. You will be prompted to enter the following information:
 - **Select a County Name:**
Scroll through the displayed County Names and select your county. (Refresh the list if necessary.) Click the ">>" button to enter the value. Then, select the next prompt under "Reply to prompts before running the query".
 - **Enter first day of Target Month (mm/01/ccyy):**
Click on the calendar icon to the right of the text box below the prompt. Use the scrolling arrows located at the top left and right corners of the calendar to go to the desired month and year (Target Month). Click on the first day of that month. Select the next prompt under "Reply to prompts before running the query".
 - **Enter last day of Target Month (mm/dd/ccyy):**
Click on the calendar icon to the right of the text box below the prompt. Use the scrolling arrows located at the top left and right corners of the calendar to go to the same month and year (Target Month) as selected in the previous prompt. Click on the last day of that month. Select the next prompt under "Reply to prompts before running the query".
 - **Enter last day of Target Month less 18 years (e.g., 01/31/1992 for Target Month of Jan 2010):**
Click on the calendar icon to the right of the text box below the prompt. Use the scrolling arrows located at the top left and right corners of the calendar to go to the same month as selected in the previous prompt, but for the year 18 years prior (by clicking on the "down" arrow on the right, if necessary). Click on the last day of that month.
8. Check the values in your responses for accuracy. Re-enter any prompt responses as necessary.
9. When you are satisfied that the criteria are correct, click the "Run Query" button near the top right of the Prompt window. Wait for the query to run.

Viewing, Saving and Using your results:

Once the results are displayed, you have several options. You can view, save and/or download the query results. See the following section for details. It is not recommended that you print the report directly from the browser window. Once you are finished viewing, saving or downloading the results, you can run the query again for another Target Month if desired. When finished, be sure to log out of CSDW.

Viewing the results

If you simply want to view the report results the following steps will provide a better view:

1. Click on the "←" (Hide Navigation Panel) icon at the top right of the Navigation Panel (the frame on the left of the window)

2. Click on the "↔" button to the left of "User Prompt Input" (at the top of the User Prompt Panel)
3. At this point you can either view the document page by page by clicking the page selectors on the query window Menu Bar or, to view the results in one continuous page, click "View" and then "Draft Mode", which will allow you to scroll through all of the results.

Saving the results:

You can save the query to a Personal Folder by doing the following:

1. Click on the "Document" button at the top left of the query window Menu Bar
2. Click "Save as"
3. The "save query" window will display. You can edit the query Title and/or Description as desired. You can also add a keyword (used for Searches.) If you want the query prompts to display automatically each time you open the query (which means you have to run the query every time you open it), leave "Refresh on Open" checked. If you want the query to display your last results when you open it, uncheck this box.
4. In the "Location" dialogue box, click the "+" sign next to "My Folders", then click the "+" sign next to "Favorites". If you have already created subfolders, you can select one as the destination for the query, otherwise just select the "Favorites" folder. (You can move the query later if desired.)
5. Scroll down the window (if necessary) until you see the "OK" button and then click on it. Your query will be saved in the selected Folder. To access the query later, use the Navigation Panel as described at the beginning of this document, expanding "My Folders" rather than "Public Folders".

Downloading the results:

To make the best use of the query results, you will want to download it to Excel. This is a simple process and has many benefits. To download the query results:

1. Click on the "Document" button at the top left of the query window Menu Bar
2. Click "Save to my computer as"
3. Click "Excel" from the pop-up menu
4. The "File Download" dialogue window will display. Click the "Save" button.
5. The "Save As" dialogue window will display. Use the "Save In" drop-down box and contents window to navigate to the desired folder or location (e.g., your "Desktop") where you want to save the results. Edit the file name in the "File Name" text box if desired. Click the "Save" button.

Once your query results are saved, use "My Computer" or "File Explorer" to find your file in the folder or location to which it was saved. Double-click the file to open the report. (You may also be able to open the file by clicking "Start" ... "Documents" and then clicking on the file name in

the list of documents displayed.) Now you will want to take a couple of steps to format your report for printing.

1. On the Main Menu bar for Excel, click "File" and then "Page Setup..."
2. In the Page Setup dialogue window, click the radio button to the left of "Fit to:" under the "Scaling" section. Leave the settings as "1 page(s) wide by", but delete the "1" next to "tall". This will force the report to one page wide and however many pages long as necessary.
3. Click "OK".
4. If you want the report to print separate pages for each worker:
 - a. Click "View" on the Main Menu and click "Page Break Preview" on the drop-down list. (If you don't see "Page Break Preview", click or hold your cursor over the "expand selection" arrows at the bottom of the drop-down list.)
 - b. To add a Page Break, select the Row below a worker's section of the report, right-click and select "Insert Page Break" from the pop-up list. The inserted Page Break is indicated by a bold solid line
 - c. To move an existing Page Break, find the Page Break (indicated by a dotted line); place your cursor over the break until you see the double arrow; click and drag the break to the desired row. The Page Break is moved and is indicated by a bold solid line.
 - d. Repeat this process as necessary.
 - e. Switch back to "Normal" View.
5. Once you are satisfied (you can check the report by clicking "File" and "Print Preview" on the Main Menu), Save your work.
6. You can add additional formatting, or otherwise manipulate the report as desired using the various editing features in Excel.

If you encounter technical problems when running the query or downloading the results:

- Try looking for your issue in the [CSDW Frequently Asked Questions](#) (there is a link to this document on the CSDW Login page)
- Contact CSDWsupport@dhhs.nc.gov