

CalSAWS | Enhancement Request (CER)

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	9/14/2022
Title	OCAT Dashboard Report Enhancement

Region #: 2	County: Sacramento	
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Program(s) Impacted:			
<input type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input type="checkbox"/> CalFresh	<input type="checkbox"/> Cal-Learn
<input type="checkbox"/> CalWORKS / RCA	<input type="checkbox"/> CAPI	<input type="checkbox"/> Child Care	<input type="checkbox"/> CMSP
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GA/GR	<input checked="" type="checkbox"/> GAIN/REP/WTW	<input type="checkbox"/> GROW
<input type="checkbox"/> Kin-GAP	<input type="checkbox"/> Medi-Cal / RMA	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other – specify			

Area(s) Impacted:			
<input type="checkbox"/> Call Center	<input type="checkbox"/> Case Assignment	<input type="checkbox"/> Client Correspondence	<input type="checkbox"/> Eligibility
<input type="checkbox"/> Fiscal / Collections	<input type="checkbox"/> Hearings	<input type="checkbox"/> Imaging	<input type="checkbox"/> Lobby Management
<input type="checkbox"/> Reports	<input type="checkbox"/> Resource Data Bank	<input type="checkbox"/> Schedule Appt	<input type="checkbox"/> Security
<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input type="checkbox"/> Task Mgmt	<input type="checkbox"/> Time Limits
<input type="checkbox"/> Training			
<input type="checkbox"/> Interface(s) - specify			
<input checked="" type="checkbox"/> Other – specify			
OCAT System Enhancement			

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Justification / Request Summary:

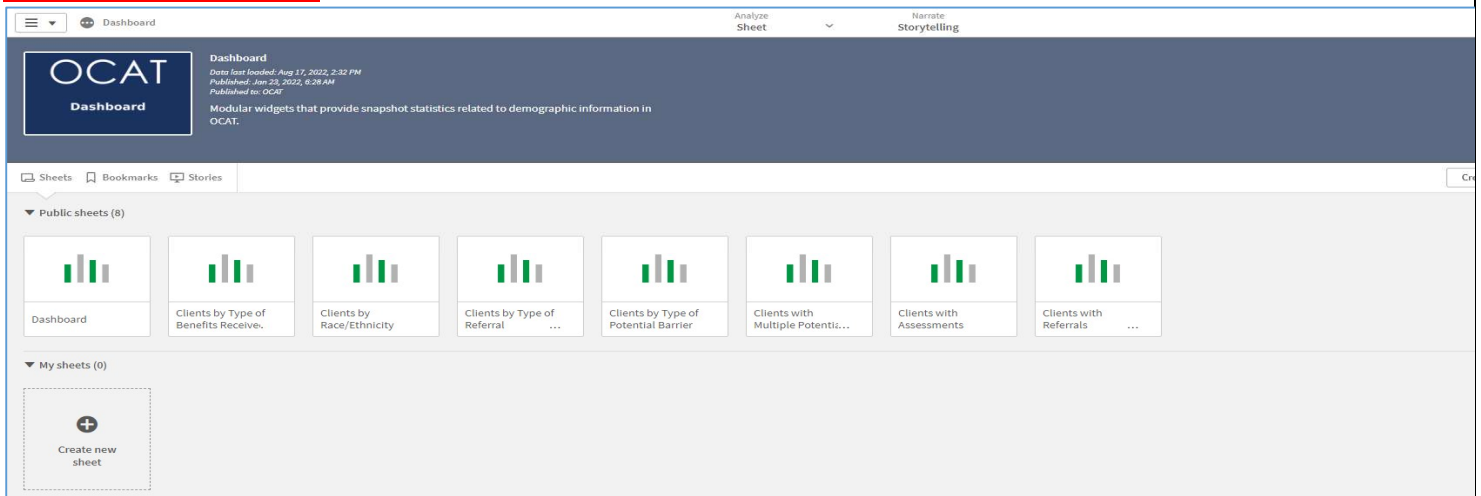
Issue:

The current OCAT Dashboard in Qlik, does not have a calendar and functionality to only search and view data for a certain measurement period. This information is needed as part of the required Cal-OAR County Self-Assessment (CSA). CDSS is requesting counties complete Section 3. Barrier Removal Services Part 1. Key Data, which includes data needed from the OCAT system: Average monthly recommendations for Domestic Abuse Services, Average monthly recommendations for Substance Use Services and Average monthly recommendations for Mental Health Services. However, the current functionality requires numerous manual steps for counties to complete in order to attempt to gather this necessary data, which creates additional workload impacts. Counties are currently tasked with providing information for the 10/2021-3/2022 measurement period.

Proposed Recommendation:

Enhance the OCAT Dashboard reports in Qlik by adding a calendar to view data for a specific date range using designated search parameters i.e. completed OCAT appraisals by Appraisal Date. This will allow counties to search their data for county purposes and the required Cal-OAR process. This is necessary to assist with reviewing gaps and developing county improvement plans to better serve and meet the needs of our customers.

OCAT Dashboard Reports:



We recommend adding a calendar to view a specific date range (same format used on “Appraisal Referral Report”) to this window. This will allow counties to view data for a certain time period. In addition, we recommend adding a dropdown menu for each demographic information category i.e. “Clients By Type of Referral Recommendation” and sub-category i.e. “Substance Use, Emotional and Mental Health and Domestic Abuse-Safety. In addition, when counties pull the detail report, they would have the ability to filter by completion date. Currently, the only information that can be viewed and utilized to identify individuals is the following: Name, CIN, Case Number and Interview ID. However, this requires counties to manually review in OCAT, the “Appraisal Date” based on their associated Interview ID. This is a manual process and creates additional workload impacts.

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Current Dashboard Headings:

Dashboard

Modular widgets that provide snapshot statistics related to demographic information in OCAT.

County Region Office

Summary

Use same calendar functionality that is used in other reports such as "Appraisal Referral Report" shown below

Date Range Select date range ▼

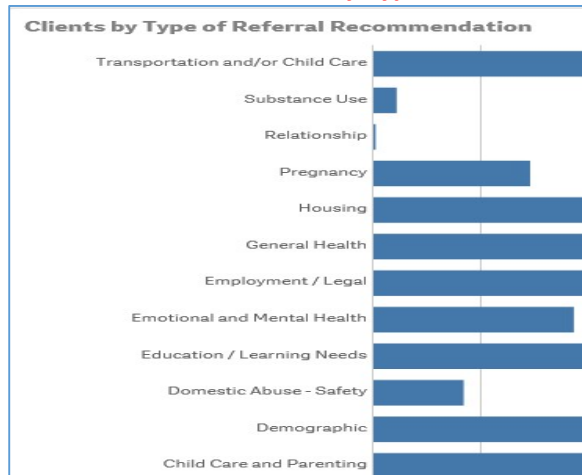
Completed Date 8/18/2022

8/17/2022

Date Range Selections

Today Yesterday Last 7 Days Last 30 Days This Month Last Month

Screenshot of the "Clients by Type of Referral Recommendation":



Current Detail Report Headings:

Clients by Type of Benefits Received

Name	CIN	Case Number	Interview ID	Vetera...	Transportati...	Supplemental Security Income	Unempl...	Scholarship/Gran	Student	State Disability	Other Non-Monetary Government Benefits	Medi-Cal or Covered California	Housi...	Child Support	Child Care	Cash Assistance Program for Immigrants (CARI)	CalFire...	CalWo...
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Priority/Implementation Consideration(s):

High

CalSAWS Response:

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CER Tracking #: (automatically generate by JIRA) CA-250244		SCR #
Rejected By:	Date:	
Rejection Reason(s) or other Comments:		