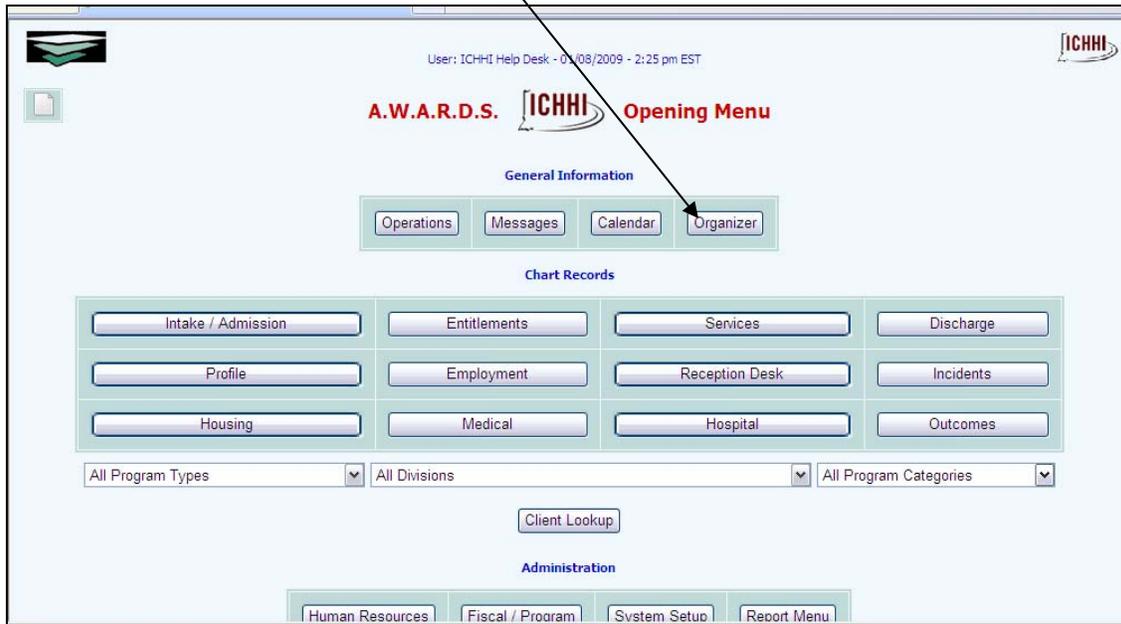


## The Caseload Activity Report

The Caseload Activity Report allows staff to see all the clients on their caseload and monitor key events and due dates that have been set for their clients.

This report is found under the [Organizer](#) menu.



Depending on whether you are a direct line staff or an agency executive the report may have a slightly different title such as ["My Agency Caseload Activity Report"](#) or ["My Program Caseload Activity Report"](#).

When you click the [Caseload Activity Report](#) button you will be taken to a page asking you to select the program you want to report on, and the date range you are interested in looking at. The report will look at all of the active clients but it will only report out on charting events that fall within the date range entered. Press [Continue](#) to run the report.

If you are an Agency Executive user you will be asked to select the Staff Person that you want to run the report for. You can choose [All Case Managers](#) or select just one person and hit [Continue](#).

The report will list all the clients on a caseload, their birth date (note that birth dates which fall within the date range for the report will be displayed in red text), the number of notes that have been written for that client (including progress notes, contact logs, group attendance, or program attendance [a reception desk feature]) as well as the number of ER Visits and the number of days in the hospital.

The report also shows any [Charting Timetable](#) events, [Service Plan](#) events, and medical appointments that have been scheduled. You will notice that the system automatically schedules an [Admission note](#) and an [Initial Service Plan](#) date for every client. Any outstanding events that have not been completed will be marked with a

red asterisk.

At the bottom of each Case Manager's listing there is a section that says [Case Manager's Totals](#) which includes a total count of all the notes written by that case manager. **Note:** The case manager may have written notes for someone who was not on their caseload, so the totals displayed here may be higher than a cursory count of the notes listed above.

For programs that use [Service Plans](#) or [FDM Action Plans](#) this report is useful for making sure the service plans are kept current.

## Questions?

Please use the [Help Desk](#) button in the [Help Menu](#) if you encounter any glitches where something is not working the way you expect it to.

You can always contact your regional representative at 800-939-1617 or send a message to the HMIS Help Desk. To find out who your regional rep is, on the Opening Menu, there is an [Information Link](#) that you can follow to see a map of the State with all of the CoC regions and the contact information for each of the regional representatives as well as the HMIS office staff.

