Reports Caseworkers Should Run to Ensure Consumer Data Integrity in CILs First

CDS/IL Specialists and Supervisors are to run these reports at the end of every month to ensure the integrity of the data in CILs First. i.e. to ensure accurate consumer data has been entered in CILs First.

1. **Checking ILPs in CILs First:** To ensure you have chosen the correct response from the **IL Plan** dropdown list for an **Intake Consumer**. In CILs First, Consumer record, **IL Plan field**: When choosing a response in the dropdown list for "**IL Plan**" an **Intake Consumer** either decides to develop an ILP (**Yes** response from the dropdown list) or Waives the ILP (**Waived** response from the dropdown list) – ***An Intake Consumer cannot be marked as an "I&R" in the ILP Plan field***

In CILs First Reports, chose the **ILP Check** report

- In the REPORT OPTIONS area:
  - **Include Feature**: chose Links to Records
  - **Match Sections**: leave blank
  - **Open Results with**: chose Web Browser
- In the Section/Field/Filter area make the following selections:
  - Consumers **Consumer Type**: leave this area blank (the blank space above the other options) – Checkmark the "Show Field" box
  - Consumers **IL Plan**: leave this area blank (the blank space above the other options) - Checkmark the "Show Field" box
  - Consumers **IL Plan Date**: leave blank - Checkmark the "Show Field" box
  - Consumers **Staff**: Chose your name from the drop down list - Checkmark the "Show Field" box
  - Consumers **Start Date**: enter date range - Checkmark the "Show Field" box
  - Consumers **End Date**: leave blank
  - Click Run Report

On the Report:

- An **Intake Consumer** cannot be marked as "I&R" in the IL Plan field; In the below report Intake Consumer categorized as I&R are highlighted in yellow
- **I&R Consumers do not develop IL Plans**; In the below report I&R Consumers categorized with a Yes (indicating the consumer developed an ILP) are highlight in green

ILP Check
View consumers' ILP status.
Created On: 05/13/2019
Staff: **Staff Name will appear here**
Start Date: **04/01/2019** thru **05/13/2019**

Last Name	First Name	Consumer Type	IL Plan	IL Plan Date	Staff	Start Date	
Consumers Last Name	Consumers First Name	I&R Consumer	I & R		Staff Name Will Appear Here	5/6/2019	
Consumers Last Name	Consumers First Name	Intake Consumer	I & R	5/6/2019	Staff Name Will Appear Here	5/6/2019	An Intake Consumer must develop an ILP or Waive the ILP
Consumers Last Name	Consumers First Name	Intake Consumer	I & R		Staff Name Will Appear Here	4/15/2019	An Intake Consumer must develop an ILP or Waive the ILP
Consumers Last Name	Consumers First Name	I&R Consumer	Yes		Staff Name Will Appear Here	4/1/2019	An I&R Consumer does not develop an ILP
Consumers Last Name	Consumers First Name	Intake Consumer	Yes	4/4/2019	Staff Name Will Appear Here	4/4/2019	
Consumers Last Name	Consumers First Name	I&R Consumer	Yes		Staff Name Will Appear Here	4/18/2019	An I&R Consumer does not develop an ILP
Consumers Last Name	Consumers First Name	I&R Consumer	I & R		Staff Name Will Appear Here	4/23/2019	
Consumers Last Name	Consumers First Name	Intake Consumer	I & R		Staff Name Will Appear Here	4/23/2019	An Intake Consumer must develop an ILP or Waive the ILP
Consumers Last Name	Consumers First Name	I&R Consumer	I & R		Staff Name Will Appear Here	4/22/2019	
Consumers Last Name	Consumers First Name	Intake Consumer	Yes	5/9/2019	Staff Name Will Appear Here	5/9/2019	
Consumers Last Name	Consumers First Name	Intake Consumer	Yes		Staff Name Will Appear Here	4/12/2019	
Consumers Last Name	Consumers First Name	Intake Consumer	Yes	4/9/2019	Staff Name Will Appear Here	4/9/2019	
Consumers Last Name	Consumers First Name	I&R Consumer	I & R		Staff Name Will Appear Here	4/12/2019	
Consumers Last Name	Consumers First Name	Intake Consumer	I & R		Staff Name Will Appear Here	4/11/2019	An Intake Consumer must develop an ILP or Waive the ILP
Total Records: 14							

If you have consumers with the incorrect IL Plan designation you will need to:

1. **Look at the consumer's file and determine if the consumer Developed an IL Plan or Waived the IL Plan, once this determination has been made** you will need to correct the choice from the IL Plan field to match the consumer's choice; chose Yes if the consumer developed an IL Plan or chose Waived if the consumer waived making an IL Plan
2. **If the report shows an I&R Consumer with a Yes response** you will need to determine if the consumer is in fact an I&R Consumer or are they an Intake Consumer. This determination will dictate whether the consumer needs to be closed as an I&R Consumer and opened as an Intake Consumer or whether the wrong response was chosen from the dropdown list in the IL Plan field.

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2. Check CILs First Closed Consumers with Open Goals: To Search Closed Consumers who have goal records which are still open in CILs First data base.

In CILs First Reports, chose the **Closed Consumers with Open Goals** Report

- REPORT OPTIONS:
  - **Include Feature**: Links to Records
  - **Match Sections**: Select Only Records in all Sections
  - **Open Results with**: Web Browser
- Section/Field/Filter Section:
  - Consumers **Active Consumers**: No
  - Consumers **Consumer Type**: Intake Consumer
  - Consumers **Program**: Leave blank (top "blank" area)
  - Consumers **End Date**: Enter the "From thru Dates" enter the date range you want to review
  - Goals **Consumer**: Leave this dropdown list blank but **Checkmark** "***Show Field***"
  - Goals **Staff**: Chose your name from the dropdown list and **Checkmark** "***Show Field***"
  - Goals **Begun**: Leave the date areas blank but **Checkmark** "***Show Field***"
  - Goals **Accomplished**: Leave the date areas blank but **Checkmark** "***Show Field***"
  - Goals **Cancel**: Leave the date areas blank but **Checkmark** "***Show Field***"
  - Click Run Report, report will open in a new browser window

Active Consumer: **No**				
Consumer Type: **Intake Consumer**				
End Date: **04/01/2019** thru **05/14/2019**				
Consumer	**Staff**	**Begun**	**Accomplished**	**Cancel**
Consumers Name appears here	CDS/IL Specialist Name Appears Here	4/1/2018	4/3/2019	
Mouse, Mickey (Intake Consumer)	CDS/IL Specialist Name Appears Here	2/25/2019	3/13/2019	
Mouse, Minnie (Intake Consumer)	CDS/IL Specialist Name Appears Here	12/14/2018		
Fudd, Elmer (Intake Consumer)	CDS/IL Specialist Name Appears Here	2/11/2019		4/4/2019
Duck, Donald (Intake Consumer)	CDS/IL Specialist Name Appears Here	10/9/2018	10/19/2018	
Bunny, Bugs (Intake Consumer)	CDS/IL Specialist Name Appears Here	3/27/2019		
Bird, Tweety (Intake Consumer)	CDS/IL Specialist Name Appears Here	1/18/2018	4/18/2019	
Duckworth, Donald (Intake Consumer)	CDS/IL Specialist Name Appears Here	3/29/2018	4/22/2019	
Simpson, Homer (Intake Consumer)	CDS/IL Specialist Name Appears Here	11/29/2018		5/1/2019
Duck, Daffy (Intake Consumer)	CDS/IL Specialist Name Appears Here	10/4/2018	10/17/2018	
Brown, Charlie (Intake Consumer)	CDS/IL Specialist Name Appears Here	10/17/2018	10/24/2018	
Boop, Betty (Intake Consumer)	CDS/IL Specialist Name Appears Here	4/2/2018	11/14/2018	
Pig, Porky (Intake Consumer)	CDS/IL Specialist Name Appears Here	11/14/2018	2/18/2019	
Simpson, Bart R (Intake Consumer)	CDS/IL Specialist Name Appears Here	1/16/2018	1/17/2019	
Woodpecker, Woody (Intake Consumer)	CDS/IL Specialist Name Appears Here	1/17/2019	3/12/2019	
Sam, Yosemite (Intake Consumer)	CDS/IL Specialist Name Appears Here	1/17/2019		
Mouse, Jerry (Intake Consumer)	CDS/IL Specialist Name Appears Here	5/31/2018	4/4/2019	
Flintstone, Fred (Intake Consumer)	CDS/IL Specialist Name Appears Here	4/4/2019		4/18/2019
Griffin, Stewie (Intake Consumer)	CDS/IL Specialist Name Appears Here	5/16/2014	4/2/2019	
Devil, Tasmanian (Intake Consumer)	CDS/IL Specialist Name Appears Here	2/26/2016	5/1/2019	
Griffin, Peter (Intake Consumer)	CDS/IL Specialist Name Appears Here	10/28/2016		5/1/2019
Mouse, Mighty (Intake Consumer)	CDS/IL Specialist Name Appears Here	3/27/2018	3/29/2019	
Bear, Yogi (Intake Consumer)	CDS/IL Specialist Name Appears Here	3/29/2019		
Rabbit, Jessica (Intake Consumer)	CDS/IL Specialist Name Appears Here	4/22/2016		5/9/2019
Mouse, Bullwinkle J (Intake Consumer)	CDS/IL Specialist Name Appears Here	4/22/2016		5/9/2019

If any blank spaces appear for "Accomplished or Canceled" goals (highlighted in yellow below) means this is a Closed Consumer with Open Goals. The following must be done to correct the Consumers Case Record (CSR).

1. Open the consumer by removing the "End Date" in the Consumers Service Record (CSR) – make note of the closed date, you will need to know that date after the following steps have been completed.
2. Go to the consumer's goals; you will need to close each of the Open Goals by entering a date in either the "Accomplished" field or the "Cancel" field.
3. Once all goals have been closed go back to the Consumers Service Record and "close" the consumer by entering the date (same date you removed in step 1. in the "End Date" filed.

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3. **Check for Incorrect "Individual Service" Catagory:** To see if an incorrect Individual "**Service**" has been inadvertently chosen from the dropdown list when entering an Individual Service Record into the Consumers Service Record (CSR) in CILs First.
   - In CILs First Reports, chose the Time Management Report
     - **Date Range**: Enter the beginning date "thru" the ending date

- **Staff**: Choose your name from the Staff dropdown list
- **Services:** Leave the Services field blank

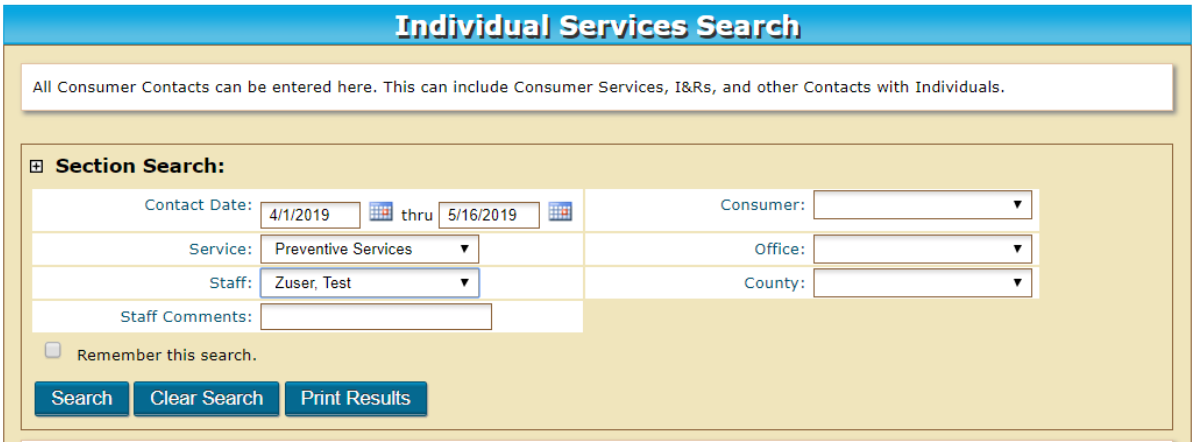
Click View Report and the following report will appear:

Time Management Report				
Dates: 04/01/2018 - 5/16/2019				
Staff	**Hours**	**Number of Records**	**Services**	**Funding Source**
Staff Name Appears Here	3.5	11	Assistive Devices/Equipment Services	
Staff Name Appears Here	0.25	1	Housing, Home Modifications, and Shelter Services	
Staff Name Appears Here	4	1	Recreational Services	
Staff Name Appears Here	0.25	1	Therapeutic Treatment	
Staff Name Appears Here	6.25	9	Personal Assistance Services	
Staff Name Appears Here	17.25	12	IL Skills Training and Life Skills Training Services	
Staff Name Appears Here	0.75	3	Communication Services	
Staff Name Appears Here	8	1	Community/Systems Advocacy	
Staff Name Appears Here	2.25	9	Housing, Home Modifications, and Shelter Services	
Staff Name Appears Here	13	25	IL Skills Training and Life Skills Training Services	
Staff Name Appears Here	0.25	1	Vocational Services	
Staff Name Appears Here	142.75	34	Youth Services	
Staff Name Appears Here	3	4	Advocacy/Legal Services	
Staff Name Appears Here	5	7	Assistive Devices/Equipment Services	
Staff Name Appears Here	1	1	Preventive Services	

Check the "Services" field in the report (see above) to ensure a wrong "Service" has not accidentally been chosen when entering an "Individual Service Record". (Yellow highlighted entries are suspect and should be checked to ensure the correct Service was entered. WILS does not offer ***Therapeutic Treatment, Communication Services*** *are defined by VR as "services directed to enable consumers to better communicate, such as interpreter services, training in communication equipment use, Braille instruction, and reading services"****, Preventive Services*** *is defined by VR as "Services intended to prevent additional disabilities, or to prevent an increase in the severity of an existing disability".* **If you work in CDS payroll** – if a service such as Peer Support has been chosen from the dropdown list this could be a red flag that you have accidentally chosen the wrong "Service".

If you find a wrong Service in the report do the following to find and revise the incorrect record:

- From the home page of CILs First, click Individual Services
- In the Contact Date fields, enter the same Dates you entered for the above Time Management Report
- In the Service dropdown list chose the Service that was incorrectly chosen when entering the original Individual Service Record (the Service you are looking to correct from the Time Management report)
- Choose your name from the Staff dropdown list
- Click Search



The Search will give you the Individual Service Record(s) that has the incorrect Service code(s). You must modify the record with the correct "Service" for this Individual Service Record.