



Overview of The Case Manager's Pipeline Tool



History of the Tool

Originated based on feedback and input from Youth Opportunity Grantees (YOG).

Working version first produced in 2008 and included:

- The Case Manager's Tool
- The Supervisor's Tool and
- The Supervisor's Longitudinal Tool

YOG had ended and the tools were never field tested or deployed.

Status Today

With the assistance of Metro San Diego, the Case Manager's Tool was tested and tweaked to fit TSL, HPHC and Face Forward youth programs.

Overwhelmingly positive response from Metro staff.

Tool was cited in the Chicago Grantees meeting which resulted in several grantees requesting the tool.

Case Manager's Tool is ready for dissemination.

Purpose of the Tool

The Case Manager's Tool allows grantee staff to:

- Track the progress of a caseload through the service “Pipeline;”
- Monitor the progress of individual participants against key time-related benchmarks; and
- Generate a report and graphs to visually illustrate the status of a given caseload.

How it Works

The tool is built as an Excel file with 4 worksheets:

- 1. Pipeline:** used to enter the client data, record key dates of services and score progress;
- 2. Roll-Up Report:** a 1 page summary report that provides a snapshot of the caseload;
- 3. Graphs:** 11 pie charts that provide key information about the caseload; and
- 4. Action Codes:** a list of the codes and what action is needed when a particular code is displayed.



How it Works

The “Pipeline” Worksheet is...

- **Where client data is Generated;**
- **Interactive:** user enters data and “scores” are provided as to case status;
- **Color coded** to assist in easy identification of issue areas – three colors are used:

On Track (G)

Needs Attention (Y)

Needs Intervention (R)



How it Works

The “Pipeline” Worksheet has:

- Information Notes: clicks them for instructions
- Count of the “scores”

GENERAL PARTICIPANT INFORMATION					
#	Last Name	First Name or ID	Age	Enroll. Date	Days in Pipe.
2	Arron	Miles	16	9/12/2013	192
1	Callahan	Jim	16	1/1/2014	81
4	Lester	Tom	20	2/2/2013	414
3	Thrum	Bill	14	8/8/2013	227
5	Kerry	John	21	9/9/2013	195

V	VI	VII	VIII
	2	2	1
ATTENDANCE			
Date of Last Participation	0 - 30 Days	31 - 60 Days	> 60 Days
1/1/2014			R
3/1/2014	G		
2/2/2014		Y	
2/2/2014		Y	
2/25/2014	G		



Using the Pipeline Worksheet

Getting Started:

- Today's Date (auto generated),
- Case Manager Initials.

	A	B	C	D	E	F
2		Today's Date:		3/23/2014		
3		Case Manager Initials:		JEC		
4						
5		Color Key		On Track (G)		
6	Needs Attention (Y)					
7	Needs Intervention (R)					
9	GENERAL PARTICIPANT INFORMATION					



Using the Pipeline Worksheet

General Participant Information Section:

- Participant's name
- Age
- Enrollment Date
- Days in Pipe (Auto Generated)
- School Status

	A	B	C	D	E	F	G
2		Today's Date:		3/23/2014			
3		Case Manager Initials:		JEC			
4							
5		Color Key		On Track (G)			
6				Needs Attention (Y)			CODES:
7				Needs Intervention (R)			TOTALS:
9	GENERAL PARTICIPANT INFORMATION						
10	#	Last Name	First Name or ID	Age	Enroll. Date	Days in Pipe.	In-School (I) or Out-of- School (O)
11	2	Arron	Miles	16	9/12/2013	192	i
12	1	Callahan	Jim	16	1/1/2014	81	o



Using the Pipeline Worksheet

Plan Review Section:

- **Date Individual Plan Last Reviewed:** Only data entry item in this section
- 0 - 45 Days: Auto Generated
- 46 - 90 Days: Auto Generated
- > 90 Days: Auto Generated

I	II	III	IV
	0	4	1
INDIVIDUALIZED PLAN REVIEW			
Date Individual Plan Last Reviewed	0 - 45 Days	46 - 90 Days	> 90 Days
10/10/2013			R
2/2/2014		Y	



Using the Pipeline Worksheet

Plan Review Section – What it does:

- As a date for plan review is entered, the Pipeline compares the review date and “Today’s Date” and provides a color coded indicator as to the status of the plan review. If "ERR" (error) is displayed the date entered is either in the future or before the enrollment date of the participant.

I	II	III	IV
	0	4	1
INDIVIDUALIZED PLAN REVIEW			
Date Individual Plan Last Reviewed	0 - 45 Days	46 - 90 Days	> 90 Days
10/10/2013			R
2/2/2014		Y	



Using the Pipeline Worksheet

Plan Review Section – What it does:

- 0 - 45 Days: if Plan Review date is within 45 days of today's date, a green **G** – (On Track) will show.
- 46 - 90 Days: if Review date is between 46 to 90 days of today's date, a yellow **Y** – (Needs Attention) will show.
- > 90 Days: (Col. K) if Review date is more than 90 days from today's date, a red **R** – (Needs Intervention) will show.

I	II	III	IV
	0	4	1
INDIVIDUALIZED PLAN REVIEW			
Date Individual Plan Last Reviewed	0 - 45 Days	46 - 90 Days	> 90 Days
10/10/2013			R
2/2/2014		Y	



Using the Pipeline Worksheet

Attendance Section:

- **Date of Last Participation:** Only data entry item in this section
- 3 different “Days” cells: Auto Generated

V	VI	VII	VIII
	2	2	1
ATTENDANCE			
Date of Last Participation	0 - 30 Days	31 - 60 Days	> 60 Days
1/1/2014			R
3/1/2014	G		
2/2/2014		Y	



Using the Pipeline Worksheet

Attendance Section – What it does:

- By entering the last date a youth was engaged in a program activity or counseling session, the tool calculates how many days have elapsed from today and that activity and assigns a score.

V	VI	VII	VIII
	2	2	1
ATTENDANCE			
Date of Last Participation	0 - 30 Days	31 - 60 Days	> 60 Days
1/1/2014			R
3/1/2014	G		
2/2/2014		Y	



Using the Pipeline Worksheet

Attendance Section – What it does:

- 0 - 30 Days: If Last Participation is within 30 days of today a green **G** – (On Track) will show or if there is no date a **R** – (Needs Intervention) will show.
- 31 - 60 Days: If Last Participation is between 31 to 60 days of today a yellow **Y** – (Needs Attention) will show.
- > 60 Days: If Last Participation is more than 60 days from today a red **R** – (Needs Intervention) will show.

V	VI	VII	VIII
	2	2	1
ATTENDANCE			
Date of Last Participation	0 - 30 Days	31 - 60 Days	> 60 Days
1/1/2014			R
3/1/2014	G		
2/2/2014		Y	



Using the Pipeline Worksheet

Pre-Placement Act. (PPA) Section:

- **# Left to Complete:** the # of pre-placement activities remaining to complete is entered. If there are none, enter "0" in this cell. Then go to the fifth column to the right of this cell and enter the date the participant completed all pre-placement activities or the date that job placement efforts began.
- **Estimated Completion Date, if Not Completed:** Enter the estimated date for completion of all pre-placement activities. If you receive an "ERR" (error) message to the right of this cell it means your "Estimated Completion Date" is in the past.
- 3 different "Days" cells: Auto Generated.

PRE-PLACEMENT ACTIVITIES (PPA) PROGRESS						
# Left to Complete	Estimated Completion Date, if Not Completed	0 - 30 Days Left	31 - 60 Days Left	> 60 Days Left	PPA Complete and/or Job Dev. Started	# of Days to Start Job Dev.
2	4/20/2014	R			3/1/2014	170
0		NA	NA	NA	2/1/2014	31



Using the Pipeline Worksheet

Pre-Placement Act. (PPA) Section – Part 2:

- **PPA Complete and/or Job Dev. Started:** Only enter a date if the participant has completed all pre-placement activities or the program has started the job development process. Dates occurring in the future will return "ERR" (error) messages in the next section of this tool.
- **# of Days to Start Job Dev.:** Automatically shows the # of days from the enrollment date to the date that job development started.

PRE-PLACEMENT ACTIVITIES (PPA) PROGRESS						
# Left to Complete	Estimated Completion Date, if Not Completed	0 - 30 Days Left	31 - 60 Days Left	> 60 Days Left	PPA Complete and/or Job Dev. Started	# of Days to Start Job Dev.
2	4/20/2014	R			3/1/2014	170
0		NA	NA	NA	2/1/2014	31



Using the Pipeline Worksheet

PPA Section – What it does

If there is an “Est. Completion Date.....” a score is shown:

- 0 - 30 Days Left: If the “Est. Completion Date...” is between 1 and 30 days a red **R** – (Needs Intervention) will show.
- 31 - 60 Days Left: - If the “Est. Completion Date...” is between 31 to 60 days of today’s date, a yellow **Y** – (Needs Attention) will show.
- > 60 Days Left: If the “Est. Completion Date...” is within 60 or more days of today’s date, a green **G** – (On Track) will show.
- If no date, “NA” is displayed.

PRE-PLACEMENT ACTIVITIES (PPA) PROGRESS						
# Left to Complete	Estimated Completion Date, if Not Completed	0 - 30 Days Left	31 - 60 Days Left	> 60 Days Left	PPA Complete and/or Job Dev. Started	# of Days to Start Job Dev.
2	4/20/2014	R			3/1/2014	170
0		NA	NA	NA	2/1/2014	31



Using the Pipeline Worksheet

PPA Section – What it does Part 2:

- If a “**PPA Complete and/or Job Dev. Started**” date is entered the “**# of Days to Start Job Dev.**” will show the number of days from the participant’s enrollment date to the date that job development started. Dates occurring in the future will return "ERR" (error) messages in the next section of this tool.
- It starts the “**# of Days Waiting**” count in the next section.

PRE-PLACEMENT ACTIVITIES (PPA) PROGRESS						
# Left to Complete	Estimated Completion Date, if Not Completed	0 - 30 Days Left	31 - 60 Days Left	> 60 Days Left	PPA Complete and/or Job Dev. Started	# of Days to Start Job Dev.
2	4/20/2014	R			3/1/2014	170
0		NA	NA	NA	2/1/2014	31



Using the Pipeline Worksheet

Placement Progress Rate Section:

- **If Placed, Date Placed:** Enter the date participant was placed. A future date will inaccurately reflect the # placed. An "ERR" (error) message means either a future date or there is a conflict between the "Date Placed" and the "PPA Complete and/or Job Dev. Started " date.
- 2 sets of "Days" counts -- 1 for waiting for placement and 1 for time it took to achieve placement, both are auto generated.

		XIII	XIV	XV		XVI	XVII	XVIII
3		1	1	0		2	0	0
PLACEMENT PROGRESS RATE								
If Placed, Date Placed	# of Days Waiting	0 - 30 Days	31 - 60 Days	> 60 Days	Placed, # of Days Waited	Placed, 0 - 30 Days	Placed, 31 - 60 Days	Placed, > 60 Days
3/1/2014	NA	NA	NA	NA	0	G		
2/2/2014	NA	NA	NA	NA	1	G		
	11	G			NA	NA	NA	NA



Using the Pipeline Worksheet

Place. Progress Rate Section – What it does:

- If there is not a placement date, the “**# of Days Waiting**” will display the # of days between today’s date and the “**PPA Complete and/or Job Dev. Started**” date and a score will follow.
- When a “**If Placed, Date Placed**” is entered the # of days between entering the placement service and placement is shown in “**Placed, # of Days Waited**” and a score is given.

		XIII	XIV	XV		XVI	XVII	XVIII
3		1	1	0		2	0	0
PLACEMENT PROGRESS RATE								
If Placed, Date Placed	# of Days Waiting	0 - 30 Days	31 - 60 Days	> 60 Days	Placed, # of Days Waited	Placed, 0 - 30 Days	Placed, 31 - 60 Days	Placed, > 60 Days
3/1/2014	NA	NA	NA	NA	0	G		
2/2/2014	NA	NA	NA	NA	1	G		
	11	G			NA	NA	NA	NA

Using the Pipeline Worksheet

Post Placement Follow-Up Section:

- **Date of Last Contact Since Placement:** Enter the date of last follow-up. "ERR" (error) means the date either conflicts with earlier dates or is in the future.
- **# Days in Fol-Up:** Shows # of days from placement to Today
- **# Days Since Last Post Place. Contact:** Shows the # of days from last contact to today.
- 2 sets of “Days” scores: both are auto generated.

			XIX	XX	XXI	XXII	XXIII	XXIV
2			2	0	0	0	0	0
POST-PLACEMENT FOLLOW-UP PROGRESS								
Date of Last Contact Since Placement	# of Days in Follow Up	# of Days Since Last Post-Placement Contact	0 - 30 Days	31 - 60 Days	> 60 Days	No Contact, 0 - 30 Days	No Contact, 31 - 60 Days	No Contact, > 60 Days
3/15/2014	23	9	G			NA	NA	NA
3/20/2014	50	4	G			NA	NA	NA
	NA	NA	NA	NA	NA	NA	NA	NA



Using the Pipeline Worksheet

Post Place. Foll.-Up Section: – What it does:

- With only a placement date, shows the # of days in follow-up and provides a score for the no contact time frame.
- When there is both a placement date and a “**Date of Last Contact...**” date, shows the days in follow-up, days since last contact, and provides a score for the timeliness of the follow-up.

			XIX	XX	XXI	XXII	XXIII	XXIV
2			1	1	0	0	0	1
POST-PLACEMENT FOLLOW-UP PROGRESS								
Date of Last Contact Since Placement	# of Days in Follow Up	# of Days Since Last Post-Placement Contact	0 - 30 Days	31 - 60 Days	> 60 Days	No Contact, 0 - 30 Days	No Contact, 31 - 60 Days	No Contact, > 60 Days
3/15/2014	23	9	G			NA	NA	NA
2/20/2014	81	32		Y		NA	NA	NA
	124	NA	NA	NA	NA			R



Using the Pipeline Worksheet

Overall Progress Score Section:

- **Overall Progress Score**, shows the overall score assigned each participant. The tool reviews each section and compares the assigned scores, defaulting to red if any section receives a red score. The tool defaults to yellow if no red score has been received but one or more yellow score is present. If all sections receive a green score, then the overall score will be green.

9	GENERAL PAF			
10	#	Last Name	First Name or ID	OVERALL PROGRESS SCORE
11	2	Arron	Miles	R
12	1	Callahan	Jim	Y
13	4	Lester	Tom	G



Using the Pipeline Worksheet

Ending a Participant, why?

- Each time the worksheet is opened all the “scores” are updated based on the new “Today’s” date.
- If a participant has successfully ended the program, and had all green scores, many of their scores will change as the worksheet is re opened to enter data on the remaining case load.
- But you do not want to delete a participant’s data because then the total case load is not shown on the reports or the graphs.
- You need to lock the data of individual participants who have concluded participation.

How do you “lock” a participant?

- Step 1: Unprotect the worksheet, to do this obtain the password. Click on the “Review” tab and select the “Unprotect” option. Then enter the password in the pop up dialogue box.

The screenshot shows the Microsoft Excel interface with the 'Review' tab selected. The ribbon includes options for 'Show/Hide Comment', 'Show All Comments', 'Show Ink', 'Unprotect Sheet', 'Protect Workbook', 'Share Workbook', and 'Track Changes'. A red arrow points from the 'Unprotect Sheet' button to a text box that reads: 'Click Review and select Unprotect Sheet. Then enter the Password and click "OK"'. Below this, another red arrow points from the text box to the 'Unprotect Sheet' dialog box, which is open and shows a 'Password:' field and 'OK' and 'Cancel' buttons.

How do you “lock” a participant?

-
- Case Manager Tool V2 [Compatibility Mode] - Microsoft Excel
- File Home Insert Page Layout Formulas Data Review View
- Paste Copy Copy as Picture
- Clipboard
- Alignment
- Number
- A11 1
- 2 Today's Date: 3/22/2014
- 3 Case Manager Initials:
- 4
- 5 Color Key On Track (G)
- 6 Needs Attention (Y)
- 7 Needs Intervention (R)
- 8 CODES: I II III IV
- 9 TOTALS: 1 0 0
- 10 GENERAL PARTICIPANT INFORMATION INDIVIDUALIZED PLAN REVIEW
- 11 Participant Name or ID Age Enrollment Date Length in Pipeline (Days) In-School (I) or Out-of-School (O) Date Individual Plan Last Reviewed 0 - 45 Days 46 - 90 Days > 90 Days
- 12 1 Jim Callahan 3/1/2013 387 o 3/3/2014 G
- 13 2
- Click on the line number to highlight the participant to be frozen, then select the "Home" Tab and choose the Copy option

How do you “lock” a participant?

- Step 3: Next select the Paste icon and the Paste Special option.

The screenshot shows the Microsoft Excel interface with the 'Case Manager Tool V2 [Compatibility Mode] - Microsoft E...' title bar. The 'File' tab is active, and the 'Home' ribbon is selected. The 'Paste' button in the 'Clipboard' group is highlighted, and the 'Paste' dropdown menu is open. A red arrow points from the 'Paste' button to the 'Paste Special...' option at the bottom of the menu. A red-bordered text box with the text 'Click on the "Paste" icon and select the Paste Special option' points to the 'Paste Special...' option. The background shows a spreadsheet with columns labeled C through J and rows 10 through 12. The spreadsheet contains data for 'Participant Name or ID', 'Age', 'Enrollment Date', 'Length in Pipeline (Days)', 'In-School (I) or Out-of-School (O)', 'Date Individual Plan Last Reviewed', '0 - 45 Days', '46 - 90 Days', and '> 90 Days'. The data for row 11 is: 1, Jim Callahan, 3/1/2013, 387, o, 3/3/2014, G, and empty cells for the last three columns. The data for row 12 is: 2, and empty cells for the last seven columns.



Using the Pipeline Worksheet

How do you “lock” a participant?

- Step 4: When the dialogue box pops up select the “Values and number format” option and click “OK.”

Case Manager Tool V2 [Compatibility Mode] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

Paste

Clipboard Font Align

Wrap Text General

Cell Styles

A11 1

Click on the “Values and number formats” and hit “Ok”

Paste Special

Paste

☒ All

☐ All using Source theme

☐ All except borders

☐ Column widths

☐ Formulas and number formats

☐ Values and number formats

☐ All merging conditional formats

Operation

☒ None

☐ Add

☐ Subtract

☐ Multiply

☐ Divide

☐ Skip blanks

☐ Transpose

Paste Link OK Cancel

Color Key			
On Track (G)			
Needs Attention (Y)			
Needs Intervention (R)			

GENERAL PARTICIPANT INFORMATION				
Participant Name or ID	Age	Enrollment Date	Length in Pipeline (Days)	
1 Jim Callahan		3/1/2013	387	
2				
3				

How do you “lock” a participant?

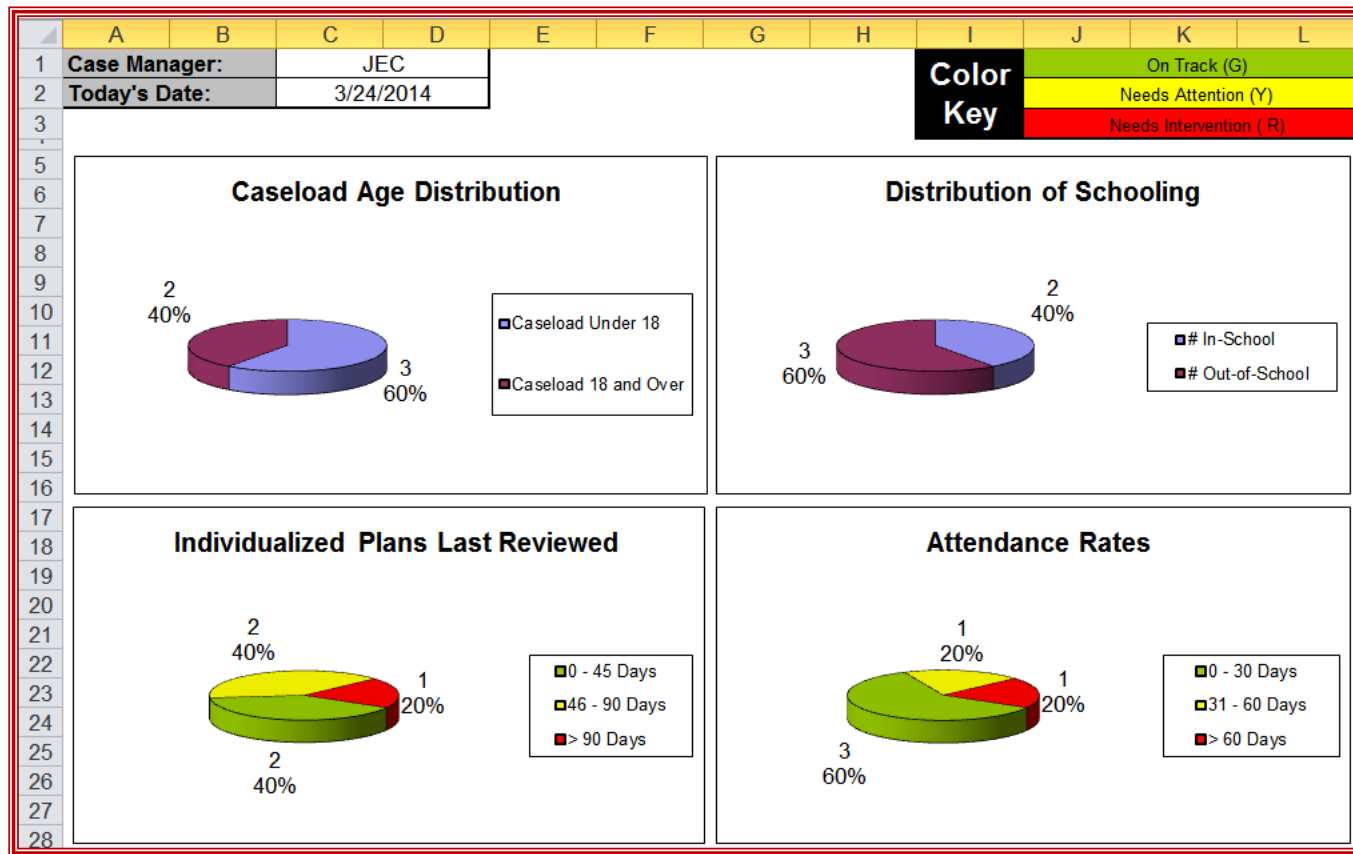
-
- Click on the "Review" tab, select the "Protect Sheet" option and enter the password in the dialogue box
- Protect Sheet**
- ☒ Protect worksheet and contents of locked cells
- Password to unprotect sheet:
- Allow all users of this worksheet to:
- ☒ Select locked cells
 - ☒ Select unlocked cells
 - ☐ Format cells
 - ☐ Format columns
 - ☐ Format rows
 - ☐ Insert columns
 - ☐ Insert rows
 - ☐ Insert hyperlinks
 - ☐ Delete columns
 - ☐ Delete rows
- OK Cancel

	A	B	C	D	E	F	G	H	I
1		Color Key:	On Track (G)				Today's Date:	3/17/2014	
2			Needs Attention (Y)						
3			Needs Intervention (R)						
5		Case Manager (Initials)							JEC
7	1	Caseload							5
8	2	Caseload Under 18							3
9	3	Caseload 18 and Over							2
11	4	# In-School							2
12	5	# Out-of-School							3
14	6	Average Length (in Days) Participants Stay In Pipeline (of those Placed)							160.667
15	7	Average Length of Time (Days) Participants Have Been Waiting to Be Placed							20
16	8	Average Length of Time (Days) Placed Participants Waited to Be Placed							14
17	9	Average Length of Time (Days) Participants Are Currently In Post-Placement Follow Up							20
19	10	# of Individualized Plans Reviewed within Last 45 Days							2
20	11	# of Individualized Plans Reviewed within Last 46 - 90 Days							2
21	12	# of Individualized Plans Reviewed Over 90 Days Ago							1
23	13	# of Participants Who Have Attended Activities within Last 30 Days							2
24	14	# of Participants Who Have Attended Activities within Last 31 - 60 Days							2
25	15	# of Participants Who Have Attended Activities Over 60 Days Ago							1
27	16	# of Participants with 1 PPA Remaining to Complete:							0
28	17	# with 2 PPAs Remaining to Complete:							1
29	18	# with 3 or more PPAs Remaining to Complete:							0



Using the Pipeline Worksheet

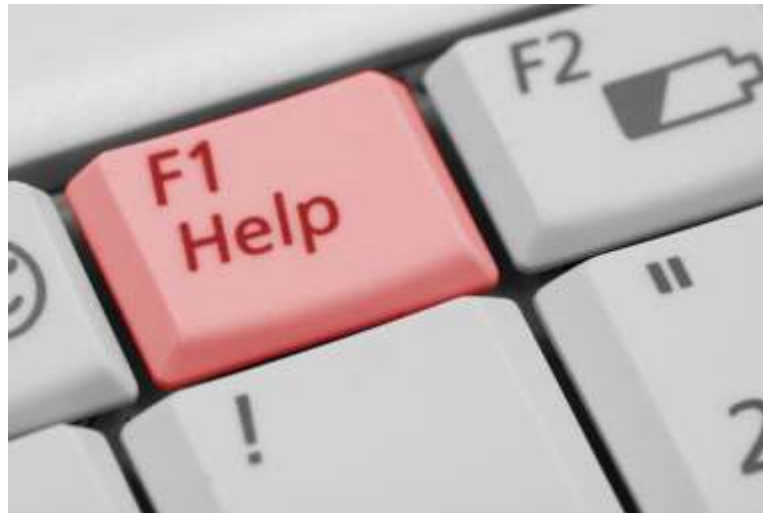
Pie Charts – 11 displays



QUESTIONS?

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Available to Help...