

[7.6] AIM Management Reports

This document was last reviewed May 2017

1. Use of the Management Report:

The regular use of this query by local managers is recommended as an aid to both managers and caseworkers as it provides a very useful summary of work-in-progress for all concerned and helps in decisions re: prioritising cases etc. At the very least it should be run once a quarter.

2. Location of the Report:

The reports are available by clicking 'Management Reports' under the management node. The report screen has 2 tabs:

The basic report, which has 7 buttons on it:

- activities by team
- installments by team
- closures by team
- activity by caseworker
- installments by caseworker
- closures by caseworker
- report parameters

And IV reports which has 6 buttons on it

- iv's open / closed by team
- iv's open at / from date
- iv's within from / to date

- iv's open by (team not monitored b/f)
- iv's open at / to date
- iv' s closed within / from / to date

3. **Information on the Report:**

The report gives details of all interventions opened from/to specified dates (to be input by the manager at the outset when seeking the report) that are still open and are not in monitored B/F by team and caseworker within the team. The data includes:

- the cases and their serial numbers,
- the numbers of days open,
- the consolidated balance outstanding when the intervention was opened and
- the current consolidated balance outstanding in the case.

A more recent version of this manual is available.