

Overview of Methodology for Producing Mutual Client Tracking Lists

The data for the Mutual Client Tracking Report are pulled from our databases via queries using Oracle Discoverer.

Step One: CWS/CMS data

QUERY 1 Open Child Welfare Cases

Query selects: 19 Digit CWS/CMS Case ID, the Child's Name, the CFS Program or Office, Primary Worker, and Phone Number, SSN, Date of Birth, and Gender

(The report users do not require SSN, DOB, and Gender but these are needed for matching purposes.)

The only condition on the CFS side is that the case is currently open (Case End date IS NULL).

QUERY 2 Open Child Welfare Referrals

Query selects: 19 Digit CWS/CMS Referral ID, Name of Child associated with the Referral, the CFS Program or Office, Primary Worker, and Phone Number, SSN, Date of Birth, and Gender

The only condition is that the referral is still open. I also limit the Referral Receive Date to the last 6 months – but there should not be any referrals open back that far.

This becomes my pool of open CFS cases and referrals that will be matched to children being aided in a CalWORKs case.

Step Two: CalWIN Data

Three queries pull data on aided children including 3 MR extracts and several tables in our CIS (county Information System) database:

MR0007E CalWORKs Adults and Children

MR0017E Caseload Movement & Worker Information (These two files are matched on CaseId)

and the Indiv1 table (this is matched to the two files above on IndividualId)

Another query pulls information on parents' participation in Welfare to Work from an MR extract:

MRA035E Employment Services. This is matched back to the cases with aided children.

A third set of queries pull worker names and phone numbers using tables in the CIS database:

Se Csld Prm Usr, Se Usr, Se Csld, and Se Usr Cntct

This information is matched to the file that includes aided children and WTW participation status of their parents.

Step Three: Matching process

The queries produce flat files that are exported as text files, imported into SPSS and matched to find mutual clients between the CWS/CMS (Child Welfare system) and the CalWIN (aided CalWORKs system). I use a two-step matching procedure. First the CFS case and referral files are matched to the CalWorks file using SSN. This will not produce a match of all relevant children because of missing SSNs and data entry errors. The second match is based on a combination of the first 5 letters of first name + first five letters of last name + DOB + Gender. This picks up more mutual clients that might have been missed on the first match. The total list is then de-duplicated. By using this two-stage process, we are getting a relatively complete match. However, more sophisticated matching procedures should probably be explored when this process is automated.

Step Four: Formatting

The report is exported to EXCEL and formatted for distribution.