Reports run weekly:

1. 60-day and 120-day Open Client list
2. Weekly Hourly Report
3. 15+ Hours Report
4. Economic Impact Report

1. ***60-day and 120-day Open Client List***

   To run this report go to Custom Lists under your Customer Tab in CIC and uncheck all categories except Lead Counselor and Customer Status. In these areas use the set and/or drop down box to choose your parameters. Under List Type click on Excel then Display. This enables you to create a new tab for each counselor. Once completed email to counselor on the list. This provides the counselor(s) with a reminder that they need to contact the client and decide how to proceed with them.

2. Format for ***Weekly Hourly Report*** includes the following:
   - Title
   - Name/Notes - Explanation of what the report will provide
   - Subject set as – ***Customers/Sessions/Details***
   - Filter includes the following
     - Customers
       - Center: Is (your center name)
       - Customer Status: All
     - Sessions
       - Date: Between (set your weekly dates i.e. 10/31/11 >11/06/11)
       - Program: All
       - Session Type: Is (All Counseling)
       - Session Type: Is Info Transfer
       - Cumulative Sessions – Cumulative Hours: Greater Than 0
     - Grouping/Settings
       - Session User/Counselor
       - Customer
       - Show Details box is checked
     - Output Format
       - PDF – View with Adobe Acrobat

When reviewing each session insure that the copy and paste has been done for the narrative and that there is something entered for each category, even if it is N/A.

Example:

THE PURPOSE OF THIS SESSION: Follow on

THE FOLLOWING WAS DISCUSSED DURING THE SESSION: Reviewed business plan and provided comments. (if you have a copy of the BP attach it to session so reviewer can view BP and notes. If no copy include highlights in your narrative)

NEXT STEPS & FOLLOW-UP ACTIONS - Client: Work on BP and contact for appointment when ready

NEXT STEPS & FOLLOW-UP ACTIONS - Counselor: Follow up in 2 weeks if client has not contacted before then.

If session is an Info Transfer double check in CIC to confirm that is should be an IT and not a Follow-on session. As a rule, if someone is a client i.e. has had an Initial Session all sessions after that should be Follow-on sessions. If non-client and there are several IT's review them and if appropriate suggest counselor make them a client.

After reviewing all sessions if you find that there is a pattern developing that does not follow guidelines email counselor with the specific information that is required. Be sure to copy your Center Director on all emails so he/she is aware of what is happening. In the email request that you be contacted when your requests have been completed. Re-review the particular client files to insure everything has been completed.

3. Format for ***15+ Hour Report*** includes the following:
   - Title
   - Name/Notes - Explanation of what the report will provide
   - Subject set as – ***Customers/Sessions/Summary***
   - Filter includes the following:
     - Customers
       - Center: Is (your center name)
     - Sessions
       - Program: all
       - Session Type: Is (All Counseling)
       - Date: Between (set your date parameters for beginning of the year to current date)
       - Cumulative Sessions – Date Range: Between (set your date parameters for beginning of the year to current date)
       - Session Type: Is (All Counseling)
       - Session Type : Is Info Transfer
       - Cumulative Hours: >=15
     - Grouping/Settings
       - Customer
     - Output Format
       - PDF – View with Adobe Acrobat

This report provides clients that have had 15 or more hours of counseling completed within the date parameters. Running your report each week you will need to check the previous week report for clients that have already been reviewed as you only need to review new client on the list. Once you have determined which client(s) you need to review open their file in CIC and read each entry from the beginning of the current year to present. You will be looking for clear concise information, linearity within the sessions, attachments and a Matrix Score.

4. Format for ***Economic Impact Report*** includes the following:
   - Title
   - Name/Notes – Explanation of what the report will provide.
   - Subject set as – ***Customers/Impact/General***
   - Filter includes the following
     - Customers
       - Center is (your center name)
       - Customer Status: All
       - SBA Borrower: All
     - Sessions
       - Program: All
       - Session Type: All
       - Date: Between (set your weekly dates i.e. 10/31/11 > 11/06/11)
     - Grouping/Settings
       - Session User/Counselor
       - Show Details box should be checked.
     - Output Format
       - PDF – View with Adobe Acrobat

This report provides economic impact by counselor and client. When reviewing the Impact sessions:

- Assess the attribution as to whether the SBDC is justified in claiming the impact.
- Verify that there is confirmation, attached or copied into the narrative, from the client that the impact reported came from them. That could include the Client Growth Assessment form and email from the client, copy of the client financials, notice from bank etc.
- Confirm all information in session is in line with what is reported by client.
- Check to confirm that a Matrix score has been assigned to client.

If everything has been entered according to what the client has reported enter a Miscellaneous Session noting that you have reviewed and approved the impact. If there is a discrepancy email the counselor with what you have found while reviewing and request they inform you as to when the discrepancy has been corrected. Be sure to copy your Center Director on all emails so they are aware of what has happened and if they need to get involved, clarify or provide support they have the opportunity to do so. Attach a copy of that email to your Miscellaneous Session.

When reviewing reports it is good to notate, on the report, any information to assist Center Director with their review. All reports are then turned into Center Director for a final approval.