

Specification for: Quarterly Financial Review Report

Objective: to develop a user report that summarizes the data from the Quarterly Financial Review

Data Sources: Quarterly Financial Review

Frequency: the report should be available “on demand” and be accessible from the Court User My Dash Board/Alerts/Financial Alerts-Quarterly and, view only, from Judges My Dashboard/My Cases/View Alerts/Financial/Financial Alerts-Quarterly.

Report Structure: the report should display a list of all Open Alerts generated by the Quarterly Financial Review and their status

Materiality: the report should only record variances where income is LESS than the business rule tolerance or where an expense is ABOVE the business rule tolerance

A mockup of the report is attached. Of course, it will need to show the case Number and the Protected Persons name.

[illegible]

Status: the status should include the following options:

- Open
- Review in Progress
- Referred to State
- Referred to Judge
- Closed

October 31, 2024