



# Summit County, Ohio Homeless Management Information System



## STANDARD REPORTING

### Training Manual Contents

- Review of Policies & Procedures
- Introduction to the Reports
- Standard reports
- Creating and Saving customized reports

## Policies and Procedures Related to Reports

- **Data Access**

Since no ServicePoint data is stored on the local computer the physical vulnerability of agency computers does not constitute a significant threat to client confidentiality. However, any user access data, such as a password, that is stored on a computer or in a written file, does constitute a risk to client confidentiality.

- **Unattended Active Sessions**

Users who have logged on to HMIS and have an active session should never leave their computer terminal unattended. The system does have an automatic log off feature (after 5 minutes?). If you are leaving your terminal for any period of time the user should logoff the active HMIS session.

- **Downloaded Data**

Users who have been granted access to Report Writer/Query Function have the ability to download and save client level data onto their local computer. **All client records containing identifying information that are stored within the participating agency's local computers are the responsibility of the participating agency.** A participating agency should develop protocol regarding the handling and protection of data downloaded.

- **Data Disposal**

The Participating Agency agrees to dispose of documents that contain identifiable client level data by shredding paper records, deleting any information from diskette before disposal, and deleting any copies of client level data from the hard drive of any machine before transfer or disposal of property.

The Participating Agencies must establish internal access to data protocols. These policies should include who has access, for what purpose, and how they can transmit this information. Issues to be addressed include storage, transmission and disposal of data.

- Printed versions of confidential data should not be copied or left unattended and open to unauthorized access.
- Media containing client-identified data will not be shared with any agency other than the owner of the data for any reason. Authorized employees using methods deemed appropriate by the participating agency may transport HMIS data that meet the above standard. Reasonable care should be used, and media should be secured when left unattended.
- Magnetic media containing HMIS data that is released and/or disposed of from the Participating Agency and Central Server should first be

processed to destroy any data residing on that media.

- Formatting and overwriting are acceptable methods of destroying data.
- Responsible personnel must authorize the shipping and receiving of magnetic media, and appropriate records must be maintained.

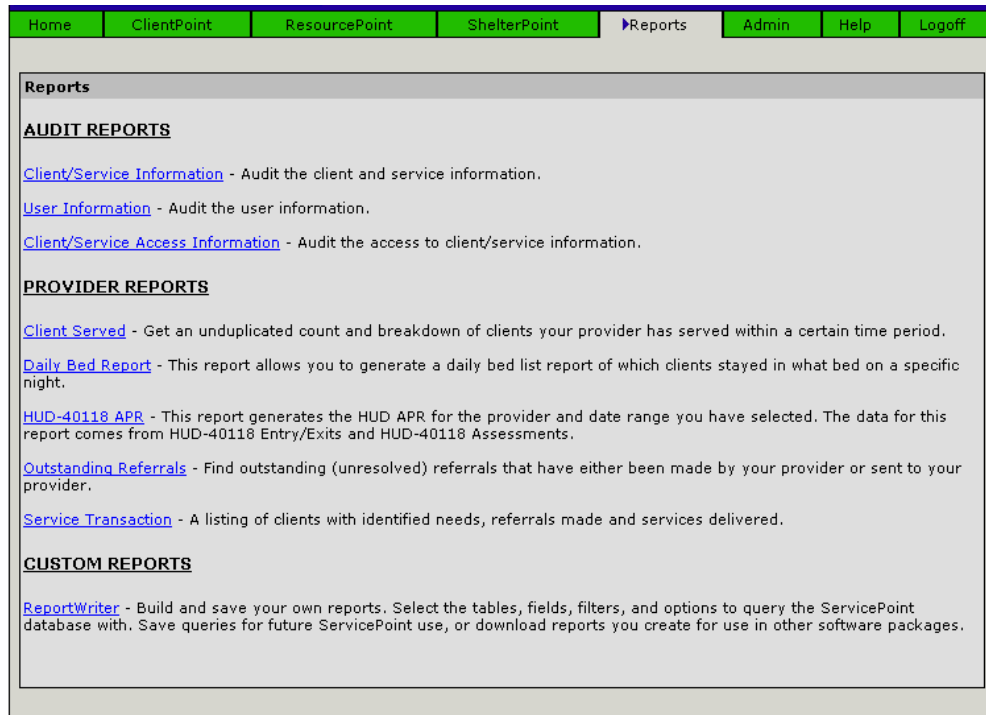
HMIS information in hardcopy format should be disposed of properly. This may include shredding finely enough to ensure that the information is unrecoverable.

## Introduction to Reports

Our HMIS software comes with standard reports and a report writer tool for creating customized reports.

To view Standard Reports:

1. Logon to Service Point.
2. Click on the **Reports** tab from the main screen.



### Audit Reports

Audit reports are used by the Agency Administrator to track and audit data that is being entered into HMIS, and user activity of each person with access to HMIS in their agency.

### Provider Reports

Provider reports are standard reports based on the client information that has been entered by each Agency.

### Custom Reports

ReportWriter is a tool built into the HMIS that will allow an authorized user to build customized reports for their agency. All customized reports should have a documented need and be approved by the Agency Administrator to ensure client confidentiality standards are upheld.

## Standard Reports

### Clients Served Report

The client's Served Report gives an unduplicated count of clients your agency has documented as having needs and/or having provided services or made referrals to another provider within a certain time period. The report checks service related information for data that was either created or provided by your agency (this includes service items or shelter stays). This is an unduplicated report with distinct clients only being counted once. This report uses the 'unique id' system mentioned to eliminate counting clients who have been entered into the system more than once. The unique id system works off of the client's first name, last name, sex and date of birth (Note: The unique id for Anonymous clients is handled a little differently, making each one always unique.)

Here are report definitions:

<b>Child</b>	A client less than the legal adult age defined by client's date of birth using the 'Legal Adult Age' as identified for this report.
<b>Adult</b>	A client that is not a child, including ones with null birth dates. If a client becomes an adult during the main reporting period, he/she will be treated as an adult. If a client has two dates of birth, one as a child and one as an adult, he/she will be treated as an adult.
<b>Single Client Served</b>	A client that received services having no service family id (services with no other household member selected for that service – the 'service.family_id' as null).
<b>Family Members Served</b>	A service received by more than one household member (service with 'service.family_id' as not null).
<b>Total Clients Served</b>	All clients that received services during the 'Served Date Range'.
<b>Old Clients Served</b>	Clients in the total Clients Served Report that have also been served during the 'Served Before Date Range' (have received services both during the period defined by the 'Served Before Date Range' and the 'Served Date Range').
<b>New Clients Served</b>	Clients in the total Clients Served Report that are not identified as 'Old Clients Served'.
<b>Average Family Size</b>	Average number of persons that were connected to the Households that were provided services during the 'Served Date Range.'

To run the Client Served Report:

1. From the main Reports module screen, click on **Client Served Report**.

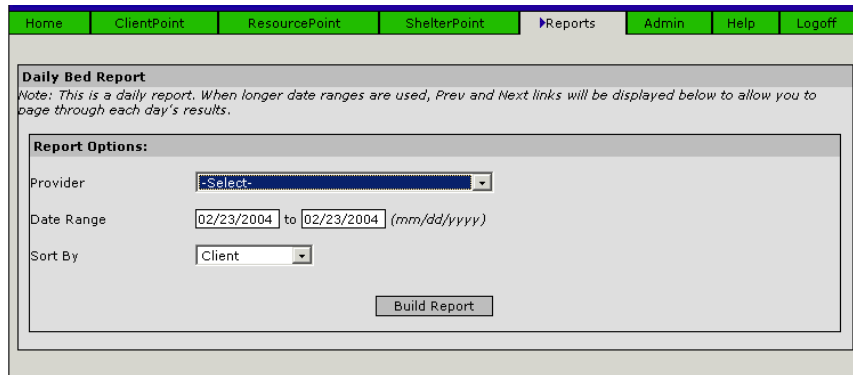
2. Select the Provider.  
Note: Depending on your Agency setup, your reporting options may include more than one branch of your agency. No individual agency will have access to a full System Wide report.
3. Select which Services to include in the report.
  - a. Check **Services Provided** to include service items that were **not** a referral or a shelter stay.
  - b. Check **Shelter Stays** to include Clients with a Shelter Check In Date ('shelter\_item=1').
  - c. Check **Referrals Made** to include a service item with a least one 'Refer to Provider' field having a provider selected ('Refer to Provider' is not null).
4. Select the type of service by using lookup.
5. Enter the Served Date Range.  
(Enter *'the date from'* and *'the date to'* which identifies the report date range during which services were provided.)
6. Enter the Before Date Range ('OLD' client count).  
(Enter *'the date from'* and *'the date to'* which identifies the 'Old' clients that received services prior to the report date range.)
7. Enter the Legal Adult Age.  
(Define the age that identifies when a person becomes an adult for this report (i.e., if 18 years is the age, then on and after the first day a person reaches 18 years, he/she is counted as an adult).)
8. Click Build Report.
9. Review your report on the screen.
10. To print the report, click **File/Print** from the menu at the top of the report window.
11. Click on the **Reports** tab again to begin a new report.

## Daily Bed Report

The Daily Bed Report will only be useful to your Agency if you have set up a Bedlist in Service Point and are actively assigning clients to that list. This report allows you to generate a daily bed list report of which clients stayed in what bed on a specific night.

To run the Daily Bed Report:

1. Click on **Daily Bed Report**.



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, Reports, Admin, Help, and Logoff. The 'Reports' tab is active. Below the navigation bar, the page title is 'Daily Bed Report'. A note reads: 'Note: This is a daily report. When longer date ranges are used, Prev and Next links will be displayed below to allow you to page through each day's results.' The main form area is titled 'Report Options:' and contains three input fields: 'Provider' with a dropdown menu showing '-Select-', 'Date Range' with two text boxes containing '02/23/2004' and '02/23/2004' and a format '(mm/dd/yyyy)', and 'Sort By' with a dropdown menu showing 'Client'. A 'Build Report' button is located at the bottom right of the form.

2. Select a Provider.
3. Fill in the Date Range.
4. Select a field to Sort By.
5. Click Build Report.
6. Review your report on the screen.
7. To print the report, click **File/Print** from the menu at the top of the report window.
8. Click on the **Reports** tab again to begin a new report.

## HUD-40118 APR

This report generates the HUD APR for the provider and date range you have selected. The data for this report comes from HUD-40118 Entry/Exits and HUD-40118 Assessments.

To run the HUD-40118 Report:

1. Click on **HUD-40118 Report**.

2. Select a Provider.
3. Fill in the Operating Year Date Range.
4. Fill in the Legal Adult Age.
5. Click Build Report.
6. Review your report on the screen.
7. To print the report, click **File/Print** from the menu at the top of the report window.
8. Click on the **Reports** tab again to begin a new report.

NOTE: You can use the **Show Null Data** to check to see if field information has been left empty for a specific data element before you run your report.

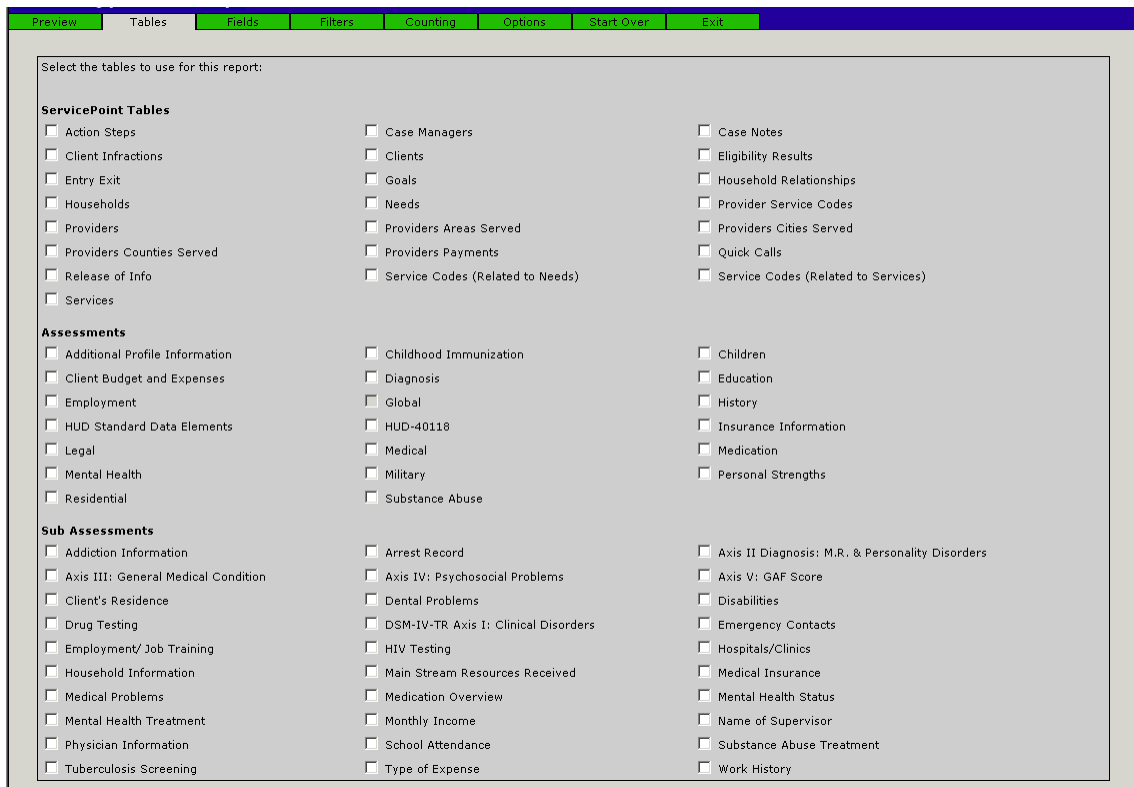
## Creating customized reports

ReportWriter is the ServicePoint tool which gives you the ability to access all the data elements in ServicePoint to customize and create and save your own reports. Select the tables, fields, filters, and options to query the ServicePoint database with.

Any customized reports created are public to all users with ReportWriter access. The Client data queried may be different, but the report parameters will be available to all report users.

### To Build a Customized Report

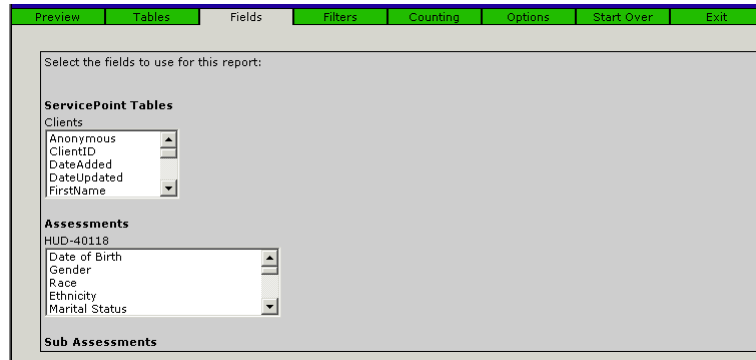
1. Click on the Reports tab.
2. Click on ReportWriter.



There are 8 tabs in the ReportWriter window. To customize your report, you will select items from each tab, then when finished click on the Preview tab to see the report.

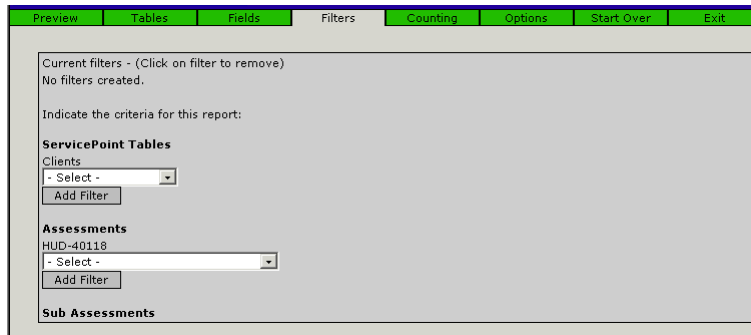
3. To include one of the tables in the report, place a check mark in the box to the left of the table name. You must select at least one table. (For this example, check the Clients table and the HUD-40118 Assessment table.)

4. Click on the **Fields** tab. Fields are displayed for each table you selected on the Tables tab. Click on the name of the field to include that information in your report. To select multiple fields, hold down the **[Ctrl]** key.

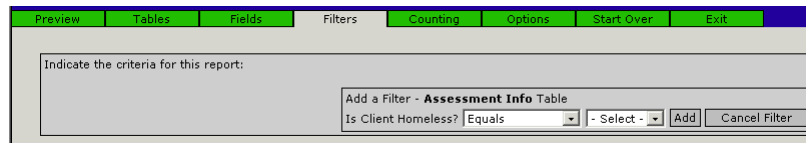


**NOTE:** As you select fields, you can click on the Preview tab and see what the report as you build. Add and remove items as you go until you get it to look the way you want.

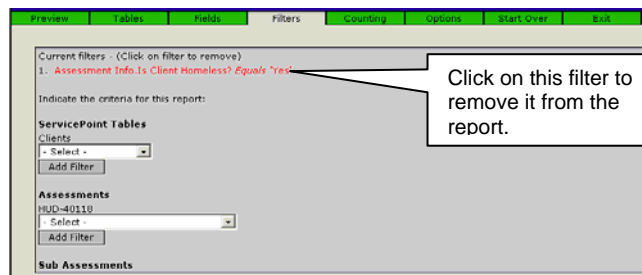
5. Click on the **Filters** tab. Filters restrict certain data within a specific field. (i.e. In a date field you can filter a specific date range.)



- a. To add a Filter for this report that filters only Homeless individuals, from the HUD-40118 Assessments list select **Is client homeless?**
- b. Then click Add Filter.
- c. Filter criteria options will appear. Select **Yes** from the second drop down list. Then click **Add**.



- d. The filter has been added to the report.



- Click on the **Counting** tab. This will give you a count of the matching records in each field you have selected.

Total rows in this report: 13  
 Unique clients in this report: 9  
 Duplicate clients in this report: 3

Gender	
Male	5
Female	4
NOT NULL	9
NULL	4
<b>TOTAL</b>	<b>13</b>

Race	
Asian (HUD 40118)	4
American Indian (HUD 40118)	1
American Indian/Alaskan Native & White	1
Asian & White	1
Black/African American & White	1
White (HUD 40118)	1
Black (HUD 40118)	1
NOT NULL	10
NULL	3
<b>TOTAL</b>	<b>13</b>

Ethnicity	
Hispanic/Latino	4
NOT NULL	4
NULL	9
<b>TOTAL</b>	<b>13</b>

MaritalStatus	
Widowed	1
NOT NULL	1
NULL	12
<b>TOTAL</b>	<b>13</b>

IsClientHomeless?	
NOT NULL	0
NULL	13
<b>TOTAL</b>	<b>13</b>

- Click on the **Options** tab. The tab gives you sorting features, data ordering, and the ability to save your report as a Quick Query. Any user who has access to ReportWriter will be able to run any Quick Query. However, he/she may not be able to see all information that a Quick Query reports without the appropriate access level. A Quick Query does not save the actual data contained within the report, so if the user reruns the Quick Query, completely different results may appear.

Indicate the column you would like to order by for this report: - Select - Ascending

Indicate the column order and column names for this report:

1	FirstName	2	LastName	3	DateOfBirth
4	Gender	5	Race	6	Ethnicity
7	MaritalStatus	8	IsClientHomeless?		

Update Order

Select a previously saved report:

Name	Date	Provider	Description
Client List	02/24/2004	Summit County Continuum of Care	Sample Test Report
Save Present Query As	02/24/2004	Summit County Continuum of Care	

Save Quick Query

- Select how you would like the primary sort field and a sort order.
- Numbers in front of each field tell you the column order. You can change any number, then click **Update Order**.
- Type a Name for the report and a detailed description so others will know the basis and need for the report. (This may save other valuable time if a report has already been built.) Then click **Save Quick Query**.

**NOTE:** Do not save every report, only those you will use over and over.

8. Click the **Preview** tab to look at the final report.

Preview	Tables	Fields	Filters	Counting	Options	Start Over	Exit
Previewing 1 - 13 of 13 rows. Show All   Download Report							
FirstName	LastName	DateofBirth	Gender	Race	Ethnicity	MaritalStatus	IsClientHomeless?
Test	Test						
Test	Test	05/16/2003	Male	Black/African American & White			
Test	Test	05/16/1981	Female	Asian & White			
Test	Test	05/16/1982	Female	American Indian/Alaskan Native & White			
test	test						
test	test						
test	test	05/16/1959	Male	Asian (HUD 40118)			
test	test	03/09/1960	Female	Asian (HUD 40118)			
test	test	10/10/1970	Male	American Indian (HUD 40118)			
test	test	01/01/1980	Male	Asian (HUD 40118)	Hispanic/Latino		
test	test	05/16/1959	Male	Asian (HUD 40118)	Hispanic/Latino	Widowed	
test	test	03/09/1960	Female	Black (HUD 40118)	Hispanic/Latino		
Assessment	Test			White (HUD 40118)	Hispanic/Latino		

- You can **Right-click** on any part of the ReportWriter screen and select Print from the shortcut menu to print your report.
- Click the **Start Over** tab to begin a new report.
- Click the **Exit tab** to leave the ReportWriter.
- Click **Download Report** to save the report as an Excel file to your computer. Please note that ServicePoint will Zip the report. A password you choose for security purposes will be needed to be able to re-open the file.
- Click **Show All** to show the complete report (all records). The initial screen will only display 50 records at a time.
- Use the Trash icon to delete a Quick Query.