

Guide to Recommended HMIS Reports

NCCEH Data Center
January 2018



North Carolina Coalition to End Homelessness

securing resources

encouraging public dialogue

advocating for public policy change

Table of Contents

How to access ART and Dashboard Reports	3
<hr/>	
Recommended Reports	
<hr/>	
Data Quality	5
<hr/>	
Case Management	7
<hr/>	
Project Management	8
<hr/>	
Agency Administrator	10
<hr/>	
Reports for Funders	11
<hr/>	
Scheduling reports in ART	12
<hr/>	
Understanding ART prompts	15
<hr/>	

How to Access ART

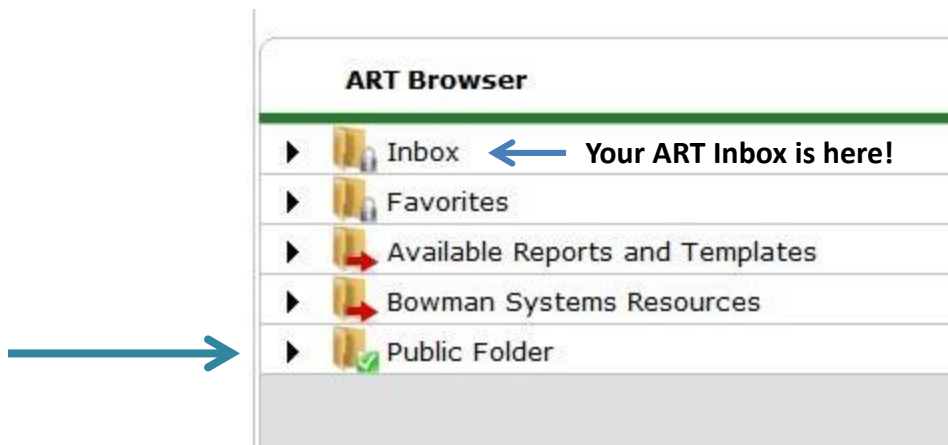
1

Select Connect to ART from top right hand corner of the Home Dashboard.



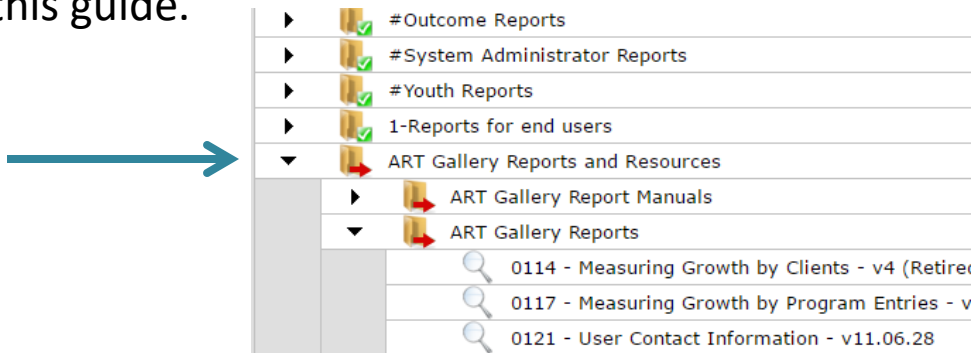
2

Click the triangle beside the Public Folder to expand it.



3

Click the triangles next to the “ART Gallery Reports and Resources” folder to access the reports recommended in this guide.



How to Access Dashboard Reports

- 1 Select Reports from the menu on the left hand side of the Home page for ServicePoint.

SERVICEpoint
Connecting Your Community.

NC HMIS
NC-503 Balance of State
May 04, 2017

Home > Home Page Dashboard

Last Viewed Favorites

- Home
- ClientPoint
- ResourcePoint
- FundManager
- ShelterPoint
- ActivityPoint
- SkandPoint
- Reports
- Admin
- Logout

System News (26) Agency News (0)

Date	Headline
04/25/2017	Open Door Session for Local System Admins Cancelled for 4/27/2017
04/24/2017	Alert - Problem with Multiple Providers in the CoC APR
04/04/2017	Upgrade Successful - NEW HUD CoC APR and HUD Data Quality Framework Available
04/03/2017	Upgrade to ServicePoint 5.12.38 tonight at 10 pm
03/20/2017	Open Office Hours for Local System Admins via GoToMeeting
02/13/2017	ART issues resolved

Add System News View All

- 2 Find and select the box for the report you need

Reports > Report Dashboard

Last Viewed Favorites

- Home
- ClientPoint
- ResourcePoint
- FundManager
- ShelterPoint
- ActivityPoint
- SkandPoint
- Reports
- Admin
- Logout

Report Dashboard

Audit Reports

- Audit Report
- User Information
- User Login

Provider Reports

- Annual Homeless Assessment Report (AHAR)
- Call Record Report
- Client Served Report

Data Quality

0212 Duplicate Clients in ServicePoint

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This ART report is designed to assist administrators in finding duplicate clients for one or more selected provider(s). The report identifies duplicates by comparing unique client ID numbers and by comparing Social Security numbers.
Prompt Tips	To find the most duplicates, select Yes to Anonymous/Unnamed Clients, Duplicates based on Service Provider, and Refer To Provider prompts.
Interval	Monthly

0631 HUD CoC APR Detail (retired)

Project Types	TH, RRH, PSH
Description	This ART Gallery report was a companion to report precursor to the now retired 0625 HUD CoC APR. It displays the record level detail behind the HUD CoC APR summary tables. The report consist of several tabs that focus on different areas of HUD CoC APR data. The report flags null data, identifies non-HUD assessment question values, and duplicate clients included in the dataset.
Interval	Monthly
Note	This report was retired and has not been updated for October 2017 Data Standards

0640 HUD Data Quality Framework Report

Project Types	all projects
Description	This report is a HUD CoC APR Data Quality and Completeness monitoring tool for the upcoming 2015 version of the HUD CoC APR. It provides information about both missing data (Data Completeness) and accuracy (Data Quality). Prompts allow the user to specify a date range and to select the provider(s) on which to base the report. The report includes a detail section to assist users in finding and fixing data entry omissions.
Prompt Tip	Choose either of the Optional prompts of Reporting Group, or Provider(s).
Interval	Monthly

Data Quality (2)

Annual Review Audit Report	
Project Types	Street Outreach (SO), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report identifies clients who have an Annual Assessment (entered through the Update function) past due, currently due, or due soon. Remember that Annual Assessments are required for all clients entered in projects for 365 days or longer within a 30 day window (+/-) around their anniversary date.
Interval	Monthly
Where to find?	ART Public Folder > #Data Quality Reports > Incongruity and Audit Reports

ROI Client Detail Audit Report	
Project Types	Street Outreach (SO), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report identifies whether clients enrolled within a date range have a project level (Level 5) electronic ROI that covers the corresponding entry. Clients with incorrect ROIs are remain blank.
Interval	Monthly
Where to find?	ART Public Folder > #Data Quality Reports > Incongruity and Audit Reports

Dashboard Report: CoC-APR	
Project Types	Street Outreach (SO), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report was created for the CoC Competition grantees to submit with their Annual Performance Report in Sage. A detailed Guide for running and uploading this report is available here: http://www.ncceh.org/files/8292/
Interval	Monthly

Dashboard Report: ESG-CAPER	
Project Types	SO, ES, TH, RRH, PSH
Description	This report was created for the CoC Competition grantees to submit with their Annual Performance Report in Sage. A detailed Guide for running this report is available here: http://www.ncceh.org/files/8549/
Interval	Monthly

Case Management

0401 Client Project History	
Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report is designed to allow the case worker to examine or print a client's project history as recorded in ServicePoint. The report contains a chronological summary of a client's project enrollment and service history as well as a more detailed display of each event. Users can specify a single client or a list of clients to include in the results.
Interval	As Needed

0404 Client Case Plans	
Project Types	SO, ES, TH, RRH, PSH
Description	This report allows users to view multiple clients and their respective case plans at once. The Case Plan document displays goals, action steps, and case notes with full details as well as a history of the client's project enrollment, caseworkers, and infractions. Additional Tabs include a case note – only display, a goal analysis tab and case plan statistics.
Interval	As Needed

0552 Goal Outcomes	
Project Types	SO, ES, TH, RRH, PSH
Description	Are the clients in your project achieving their goals? The purpose of this report is to first look at goal outcomes by goal types. Goal outcomes are also grouped by demographic and service-related variables to determine if other factors might be affecting goal outcomes.
Interval	As Needed

Project Management

0315 Project Daily Census	
Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report provides a daily project census for a selected project for a 31 day period of time. The daily census is based on client entries and exits, and includes individual counts, household counts, percent of capacity and breakdowns by gender, age, race, ethnicity and prior living situation. In addition to this summary data, the report includes the client detail related to each breakdown, and combined counts for the entire reporting period.
Interval	As needed

0347 Billing Summary	
Project Types	SO, ES, TH, RRH, PSH
Description	This report allows users to examine billable services by project, service type, client, and case worker .
Interval	As needed
Note	Projects must enter unit cost information for each service transaction to use this report.

0550 Exit Destination Outcomes	
Project Types	SO, ES, TH, RRH, PSH
Description	This report uses exit information to show where clients went after they left your project and whether they were positive or negative destinations. In addition to basic exit and outcome information, the report groups positive and negative exits by different variables such as household status and the number of services received during the project. As a result, projects can learn more about how those variables are associated with positive and negative exit destinations .
Interval	Monthly

Project Management (2)

0551 Exit Reason Leaving Outcomes	
Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report displays the reasons for which your clients left your project and whether they were positive or negative reasons. In addition to basic exit and outcome information, the report groups positive and negative exits by different variables such as household status and the number of services received during the project. As a result, you can see how those variables are associated with the positive and negative reasons for leaving the projects.
Interval	Monthly

Housing Move In Data Quality Report	
Project Types	Rapid Re-housing (RRH), Permanent Supportive Housing (PSH), Other Permanent Housing (OPH)
Description	This report lists all clients with the Entry Date, Housing Move-In Date, and Exit Date (if available).
Interval	Monthly
Where to find?	ART Public Folder > #Data Quality Folder > Incongruity and Audit Reports

Dashboard Report: Annual Homelessness Assessment Report (AHAR)	
Project Types	Emergency Shelter (ES), Transitional Housing (TH), Permanent Supportive Housing (PSH)
Description	This report is designed for the CoC to use and submit AHAR data to HUD. However, it can also give you insight into the Household composition, Bed Utilization rates, and Length of Stay for your projects. If you want to run this report for more than one project at a time, please contact the Data Center for support in creating a Reporting Group.
Prompt Tips	Use the Operating Year Date Range of 10/01 through 09/30, and the last Wednesday of October, January, April and July as the four other dates. For Fiscal Year 2017 that is 10/26/2017, 01/25/2017, 04/26/2017, and 07/26/2017.
Interval	Monthly

Agency Administrators

0123 ServicePoint User Last Login Report	
Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This reports allows administrators to identify inactive users and to analyze system usage patterns.
Interval	Monthly

0227 Project Descriptor Elements Data Quality	
Project Types	SO, ES, TH, RRH, PSH
Description	This report is designed to monitor data quality by locating HUD required project descriptor data which is missing. This data is crucial to CoC Program Applications, APRs – CoC and HMIS, and for HUD System Performance Measures.
Interval	Quarterly

Reports for Funders

0323 Project Demographics	
Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Rehousing (RRH), Permanent Supportive Housing (PSH)
Description	This ART report provides demographics on clients served during a user specified reporting period. Data is compiled using the last transaction per client for Entry/Exits, Services and/or Shelter Stays. The report also contains various tabs with tables and graphs for Project Type, Age/Gender, Race/Ethnicity, Homeless Condition, Veteran Status, Disability, Domestic Violence/Extent, Income/Non-Cash Benefits, and Employment/Education.
Interval	As Needed

All Clients Demographics Report -Additional County Tabs – Provider	
Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Rehousing (RRH), Permanent Supportive Housing (PSH)
Description	This ART Gallery report has been to allow for the completion of the HUD CoC APR. The layout of the report is aligned with e-snaps forms. A companion ART Gallery Report, the 0631 HUD CoC APR Detail provides several data detail and data quality tabs to assist the user in reviewing data for completeness and accuracy.
Interval	Quarterly
Where to find?	ART Public Folder > #Demographics Folder > All Client Demographic Reports

D554 - Income Change Pie Chart	
Project Types	SO, ES, TH, RRH, PSH
Description	This dashlet shows those clients in a project whose income has exhibited a positive change versus those who have not. You can select all clients or only those 18 and over.
Interval	As needed

Scheduling Reports in ART

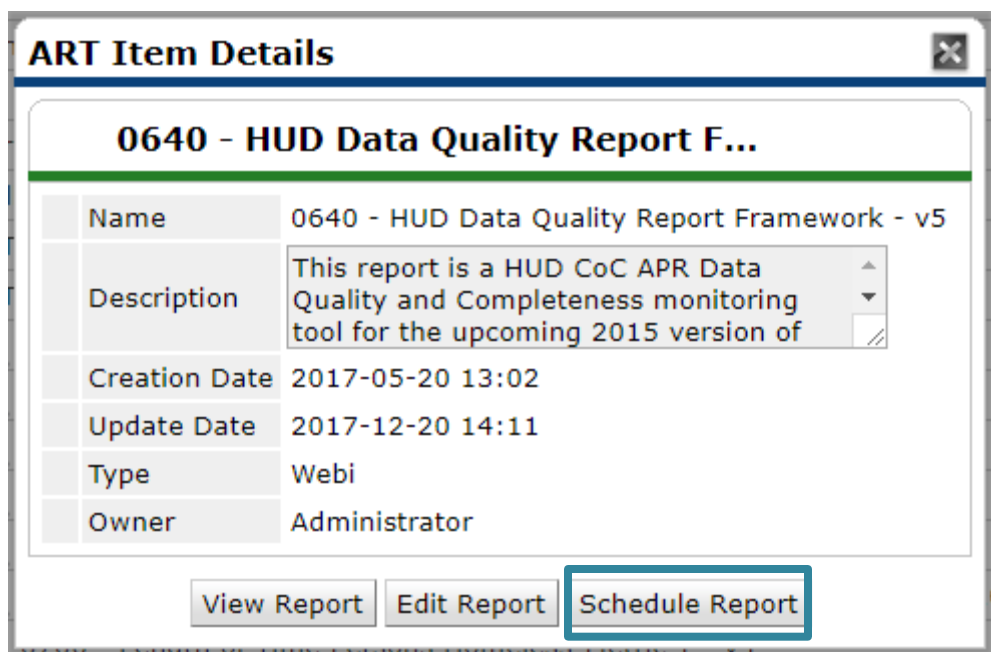
- 4 Click the triangle next to the “ART Gallery Reports and Resources” and “Art Gallery Reports” folders to access the recommended reports.



- 5 To schedule an ART report, click the magnifying glass next to report. We recommend scheduling all ART reports.



- 6 In the ART Item Details window, select the Schedule Report button. In this example, we’re scheduling the 0640 HUD Data Quality Framework.



7

Complete the prompts below by clicking on each prompt, clicking “Select” and entering or choosing the suggested text. Do not click “Next” until you have entered all prompts. You may skip prompts that say “optional”. The text below is just an example. Each report has different prompts. Please contact us if you need assistance completing them in ART.

NOTE: Agencies *never* use the CoC Code prompt. Always leave this prompt **blank**.

The screenshot shows a window titled "ART Report" with a close button. Below the title bar is a section titled "Prompts" with a green underline. Underneath, it says "Fill out each of the prompts below *". There is a list of prompts in a scrollable area:

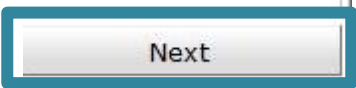
- Select Provider(s):
- EDA Provider
- Enter effective date
- Enter Start Date:
- Enter End Date PLUS 1 Day:

Below this list is another prompt: "Select Provider CoC Code(s):" with the word "Optional" in light blue text below it. To the right of this prompt is a "Select" button.

Enter the name of project(s)
Leave Default w/ several projects
Enter end date + 1
Enter start date
Enter end date + 1

8

Click the Next button to schedule the report.



9

Select the desired Report Format and Interval from the drop down menus. We recommend Excel for report format. See Interval section of each report for frequency recommendations. Only schedule up to three months in advance.

Schedule Report

Schedule

Name * 0640 - HUD Data Quality Report Fra

Report Format * Excel

Users * Andrea Carey (5510) Search My User Clear

Inbox

Interval * Once

Start Date * 01 / 04 / 2018 2 : 06 PM

End Date * 01 / 04 / 2018 3 : 00 PM

Send

10

Change the End Date time to allow the report at least 1 hour to run. In the example above, we've edited the End Date time to reflect 3:00 PM.

11

Click Send. Check your ART inbox in 1 hour to download the report.

Advanced Reporting Tool

ART Browser

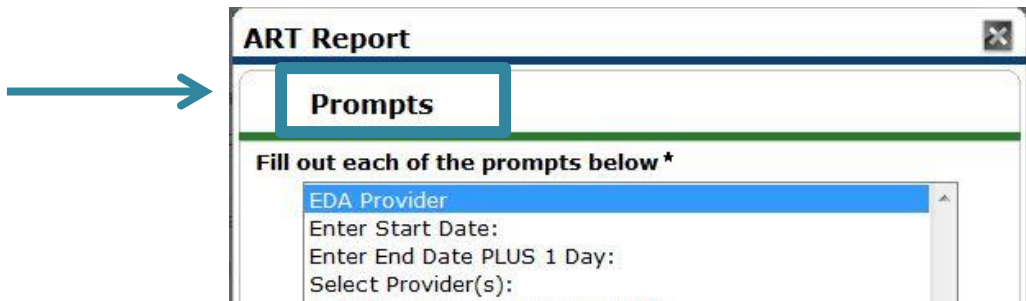
- Inbox
- Favorites
- Available Reports and Templates
- Bowman Systems Resources
- Public Folder



Protect client data.
Never save client identifying information to your computer.

Understanding ART Prompts

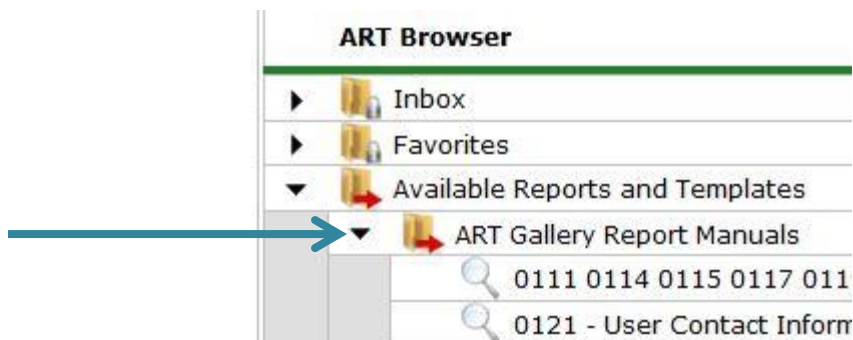
To run reports in ART, you will need to give ART information about which project(s) you want included in the report, the calendar dates you want the report to cover, etc. When scheduling an ART report, this information is captured in the “Prompts” window.



A large majority of ART reports require users to provide Start Date, End Date, Provider, EDA Provider and Effective Date. We’ve explained each of these items on the next page.

Some reports require you to enter additional information.

Good News: There is a manual for each report recommended in this guide. The manuals explain all of the prompts required for each report. Click the triangles next to the “Available Reports and Templates” and “ART Gallery Report Manuals” folder to access the reports recommended in this guide.



Understanding ART Prompts

Basic Prompts

Report Start Date: The date corresponding to the beginning of the desired date range for the report.

Report End Date: Enter the date one day after the end of the desired date range.

Effective date: Enter the date for which all data should be effective. This should be the same as the End Date PLUS 1 day.

Provider(s) for Report: Select the project(s) to include in the report.

EDA Provider: Select the project to include in the report. ONLY enter this prompt if running a report for a single project. If running a report for multiple projects, SKIP this prompt.

ncceh.org/hmis

access local support for Balance of State, Wake,
Durham, & Orange CoCs

919.410.6997 or **hmis@ncceh.org**

helpdesk for local support



North Carolina Coalition to End Homelessness

securing resources

encouraging public dialogue

advocating for public policy change