HMIS ACTIVE CLIENT LIST:

BY NAME LIST REPORT

GUIDE

Institute for Community Alliances

HMIS ACTIVE CLIENT LIST: BY NAME LIST REPORT GUIDE

CONTENT

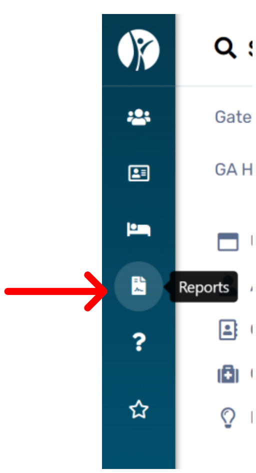
PURPOSE

This guide serves a purpose of how to generate a By Name List Report for Active Clients during certain periods of their enrollment into a program. This report can be used to view your clients that are actively enrolled in a program, when they began their enrollment and when they exited at any time during the program. With the exported BNL report, you will also be able to discover if a client is missing any data elements that may affect other reports.

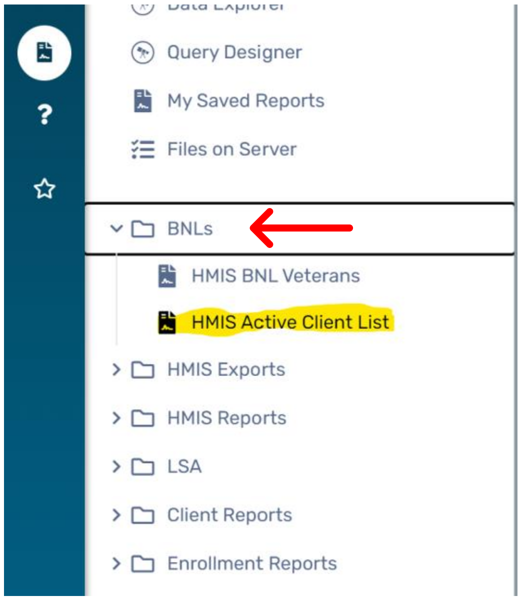
HMIS BNL REPORTS

To login, use the Workgroup “GA HMIS: HMIS Programs” and Organization user’s “HOME Organization”.

Go to the “Reports” workspace by clicking the icon as shown below.



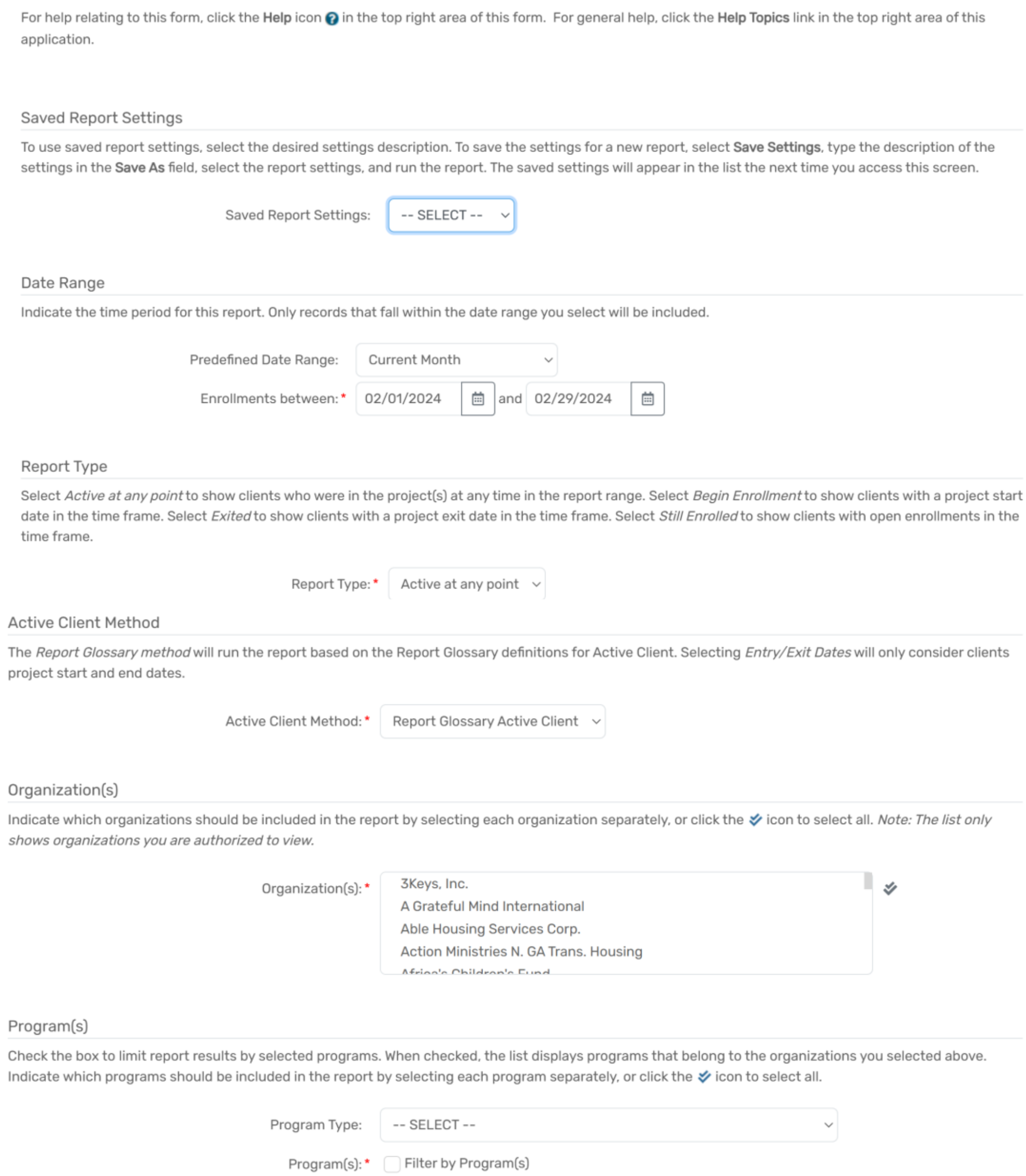
BY NAME LIST REPORT



HMIS ACTIVE CLIENT LIST REPORT

1) An active client list report can be generated to get an accurate count of clients that are enrolled into your program
2) You can save your report settings to run later. Select "Save Settings" and input a name for your report. The saved name of the report will appear after the report is.
3) Enter the Enrollments Between Date. This will only display clients who have a record that falls within that date range.
    - Selecting a predefined date range will automatically populate the between dates.
4) You will need to select a "Report Type".
    - Select Active at any point to show clients who were in the project(s) at any time in the report range.
    - Select Begin Enrollment to show clients with a project start date in the time frame.
    - Select Exited to show clients with a project exit date in the time frame.
    - Select Still Enrolled to show clients with open enrollments in the time frame.
5) Select an Active Client Method filter you prefer your report to generate as.
    - The Report Glossary method will run the report based on the Report Glossary definitions for Active Client.
    - Selecting Entry/Exit Dates will only consider clients project start and end dates.
6) The organization will auto-fill based on the organization the user is logged in as.
7) You can filter the report by grants, program, and CoC. It is rare that you will need to filter with a CoC.
8) You have the option to filter the report by Sub-Population and Head of Household only.
9) Filtering the report by "Users" allows you only review those clients that are apart of the selected organization for the report.
10) If you wish to hide the PII, you can check the box to hide the client's name and social numbers.

11) Proceed with the "Run Report" Steps to obtain the data.



For help relating to this form, click the **Help** icon in the top right area of this form. For general help, click the **Help Topics** link in the top right area of this application.

Saved Report Settings

To use saved report settings, select the desired settings description. To save the settings for a new report, select **Save Settings**, type the description of the settings in the **Save As** field, select the report settings, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: -- SELECT --

Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month

Enrollments between: * 02/01/2024 and 02/29/2024

Report Type

Select *Active at any point* to show clients who were in the project(s) at any time in the report range. Select *Begin Enrollment* to show clients with a project start date in the time frame. Select *Exited* to show clients with a project exit date in the time frame. Select *Still Enrolled* to show clients with open enrollments in the time frame.

Report Type: * Active at any point

Active Client Method

The *Report Glossary method* will run the report based on the Report Glossary definitions for Active Client. Selecting *Entry/Exit Dates* will only consider clients project start and end dates.

Active Client Method: * Report Glossary Active Client

Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. *Note: The list only shows organizations you are authorized to view.*

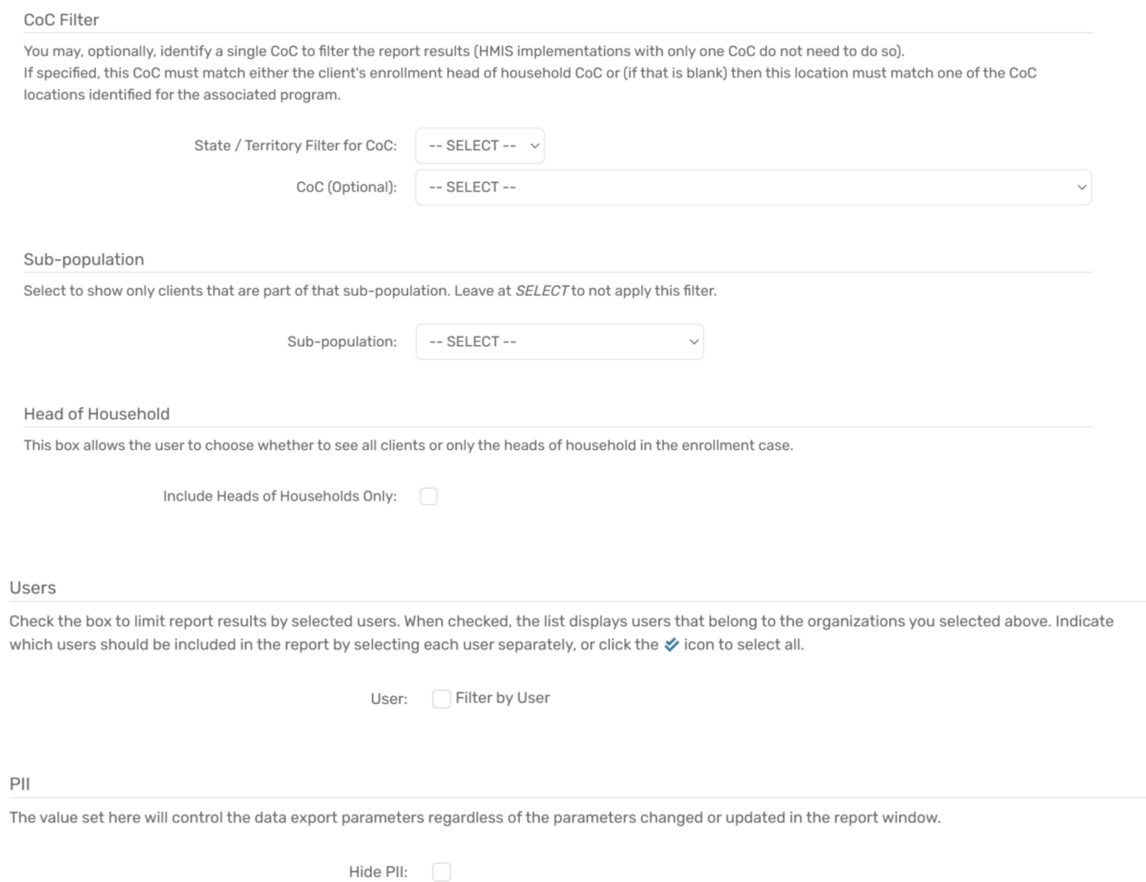
Organization(s): *
3Keys, Inc.
A Grateful Mind International
Able Housing Services Corp.
Action Ministries N. GA Trans. Housing

Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

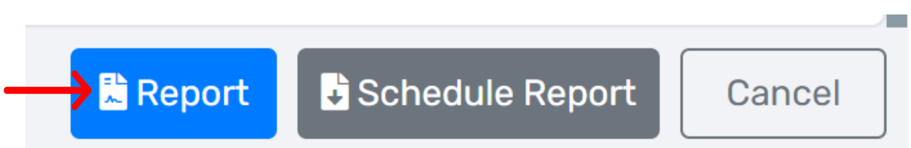
Program Type: -- SELECT --

Program(s): * Filter by Program(s)



RUN THE REPORT

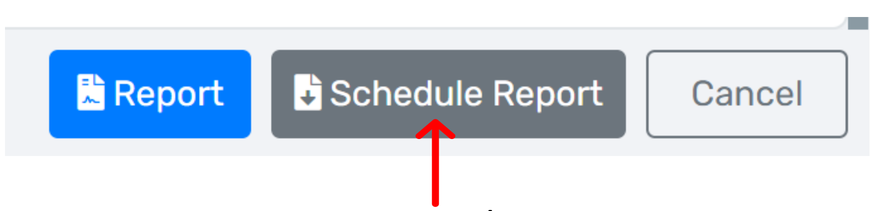
1) Click “Report” at the bottom of the window.



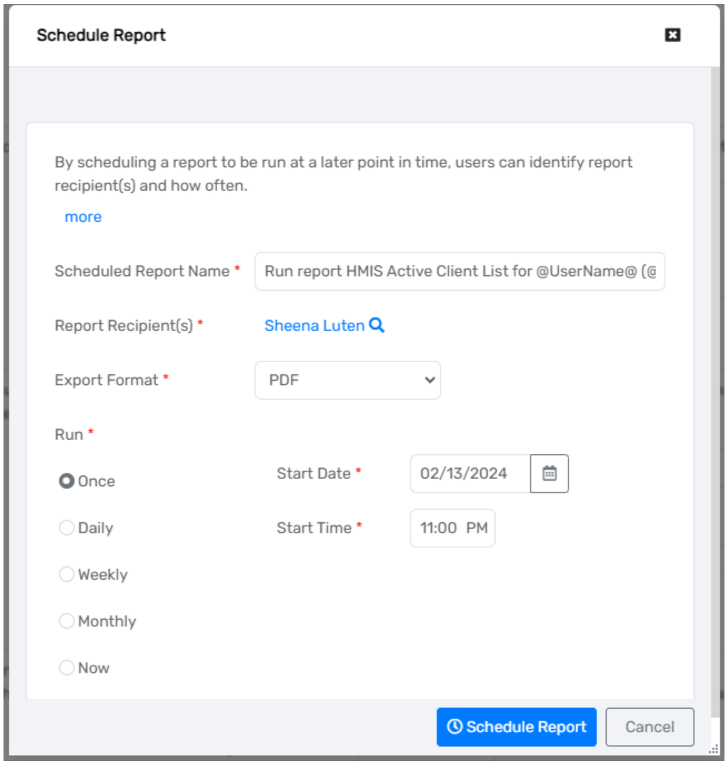
2) The report will generate in a new widow.
3) You do have the option to save the report as a PDF, Excel, Excel Data or Microsoft Word

RUN A SCHEDULED REPORT

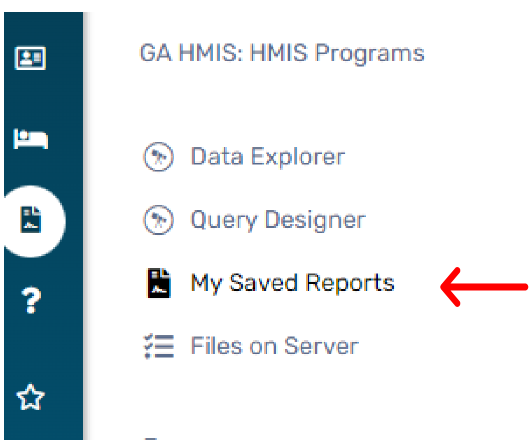
4) A scheduled report allows for you to set a time for this report to run automatically.
5) To run a scheduled report click the “Schedule Report” tab.



6) A new window will pop up



7) Make sure you name your report by inputting your name or login where it states *@UserName@ @UserID@*
8) You have the option to schedule the report to run daily, weekly, monthly or just one time. You can set a reoccurring date and time for the reports you want ran daily, weekly or monthly. If you do not want the report executed in the moment you are on the screen, you can set a time to generate it later.
9) To get your scheduled report, go to the "My Saved Reports" in the reports menu.



10) You will then see all of your completed reports that you've scheduled to run.
11) Click the magnifying glass next to your report to download.

REPORT SETTINGS FOR HMIS BNL VETERANS

1) The BNL Veteran report is to get an accurate list of the Veterans in your program
2) You can apply the same settings as demonstrated for the Active Client List.

UNDERSTANDING THE EXPORT MATERIAL

1. Below is a display of the fields that are in an exported report
2. Understanding the filed information along with how to review for accuracy, allows you to correct and review the data shown
3. This will help to reduce or identify errors that may populate on the Data Quality Report

Available fields	Field Information	Data Review Guidance
OrganizationName	The organization the client receives services from	N/A
ProgramName	The Program the client is enrolled in	N/A
ProgramType	The type of project that the client is enrolled in	ES,TH,PH, SO, SSO, Other
CaseID	is used to show which household members are attached to one another	N/A
ClientID	The special identification of a client	N/A
ClientName	Required Field	Required Field
Age	This is a calculated field.	N/A
DOB	Required Field	Required Field
DOBQuality	Ensuring that the data inputted for the DOB is complete and rational	This will appear as a DQ error if the user selects "Client Doesn't Know", "Client Refused", "Data Not Collected"
SSN	Required Field	Required Field
SSNQuality	Ensuring that the data inputted for the SSN is complete and rational	This will appear as a DQ error if the user selects "Partial", "Client Doesn't Know", "Client Refused", "Data Not Collected"
Race	Required Field	"Multi-Racial" may appear in reports where there are selections of more than one
Ethnicity	Required Field	Required Field
Gender	Required Field	Required Field
VeteranStatus	Required Field	Required Field
Enroll ID	Automatically Created once enrolled into a project	N/A
EnrollDate	The date that the client started receiving services from your org	N/A
Relationship	The relationship to the Head of Household	Self, Spouse, Son, Daughter, Other Family Member, Other Non-Family, Dependent Child
HouseholdType	This is a calculated field.	Adult Only, Adult w/Children,
YouthHouseholdType	RHY field only	N/A
DisablingCondition	Required Field. Identifying Y/N if the client has a Disabling Condition	N/A
ChronicallyHomeless	This is a calculated field.	The Head of Household in PSH household enrollments should have CH = Yes. Other members may also be chronic, however the head of household = Self must be chronic at a minimum
MoveInDate	The date that the HH moved into a PH unit	RRH and PSH Projects should confirm all enrollments have move -in dates as soon as clients are housed.
EngagementDate	Outreach and PATH only	N/A
DateOfDetermination	Outreach and PATH only	N/A
FederallyEnrolled	This is a calculated field.	N/A
RunawayYouth	RHY field only	N/A
ExitDate	The date that the HH discharged from the program	N/A
ExitDestination	The location of the HH once discharged from the program	N/A
CashIncome	The dollar amount received monthly in Cash Income	N/A
VAMedical	Health Insurance?	N/A
DaysEnrolledInReportingPeriod	Calculated based on report dates	N/A
TotalDaysEnrolledInProject	Calculated based on project start and end	N/A
EnrollmentNumber	The Enrollment number of the project with the organization	Should appear as "1". If "2" is shown, that is an indication that the client has a duplicated enrollment in the same project.
BedNightsInReportPeriod	x	N/A
BedNightsInProject	x	N/A

HUD RESOURCES

- HMIS STANDARD REPORTING TERMINOLOGY GLOSSARY
  https://files.hudexchange.info/resources/documents/HMIS-Standard-Reporting-Terminology-Glossary.pdf