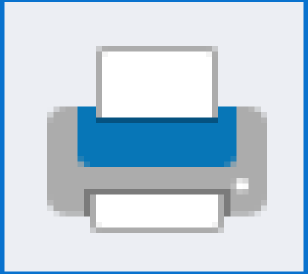
HMIS: Reporting

SACRAMENTO STEPS FORWARD

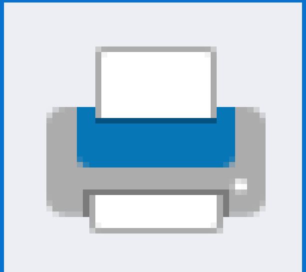
Client Level Reports

Found on the Client's HMIS Record on the Side Bar



SACRAMENTO STEPS FORWARD

Client Reports



Case Notes: All Notes written by your agency staff within selected report date range

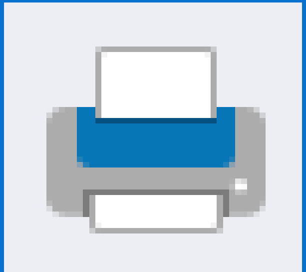
Client History: All program enrollments and services provided by your agency within the selected report date range

Profile Screen: Printable summary of the Client Profile demographics (Does not include information on Global Household members)

Client Service Notes: Printable summary of notes written within your agency provided services.

Client Summary: Summary of FULL HMIS record
General Information - Demographics, income, Chronic Homeless Status, reported disabilities, victim of DV, Global Household members
Location/Contact Information – List of known location address/contact information
Housing Information – Summary of Program Type Enrollments, # of enrollments, dates enrolled
Coordinated Entry Information – VI-SPDATs, referral information
Agencies that have Provided Services – List of Agencies and year(s) services were provided

Client Reports



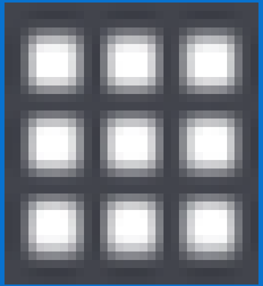
Homeless Status Timeline: Can be used to determine whether client has homeless history in HMIS to be used towards determining Chronicity

Client Enrollment Details: Downloads as an Excel file. List of Program Enrollments. Includes program name, program type, start and end dates, homelessness history prior to program enrollment, any Move-In Date during enrollment, and exit destination information

Agency and Project Level Reports

Go to the Lauch Pad (located on the Global Task bar),

then click on Reports



SACRAMENTO STEPS FORWARD

Agency and Project Level Reports

Report Library for "canned reports"

***Explore** for creating your own Looker reports

***Data Analysis** for custom reports requested from our vendor or SSF staff

*Further review of these tabs and available reports to be covered in a future training.
Date TBD

SACRAMENTO STEPS FORWARD

Report Library

https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library

Administrator Reports

- VI-SPDAT Centralized Intake Dashboard Report
- Client Assessment Score
- HUD Veteran By-Name List
- ***Housing Inventory (HIC)***
- **Annual Performance Report**

Agency Management

- **User Activity Report**
- **User Active Caseload**
- **Staff Client Data Activity Report**

Assessment Based Reports

- Assessment Details Report

Community and Referrals

- **VI-SPDAT Details**
- Referral Statistics
- Referral Outcomes Statistics
- **Coordinated Entry Compliance Report**

Report Library

https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library

Data Quality Reports

- Duplicate Clients

Email Reports

- Monthly Staff Reports
- Monthly Agency Utilization Report
- Weekly Housing Census [Program Based]

Housing

- Housing Census [Program Based]
- Current Housing Availability

HUD Reports

- HUD Veteran By-Name List
- HUD CSV / XML Program Data Export
- PATH Annual Report
- **HMIS Data Quality Report**
- **Annual Performance Report**
- ESG CAPER
- LSA Export – Project-Focused LSA

Report Library

https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library

Program Based Reports

- Program Data Review
- Project Start Date > Project Exit Date
- Employment / Education Report
- Program Service Expense Review
- Program Funding Source Financial Detail
- Program Participation Summary
- **Program Roster**
- **Program Details Report**
- Program Group Income
- Program Household Served Report
- New vs. Re-Entry Client Program Classification
- Client Project Stay Issues
- NOFA CoC Project Data Query
- Program Linked Service Review
- **Program Outcome Measures**
- Performance Monitoring
- **Client Demographics**
- Program Recidivism
- Client Program Service

Report Library

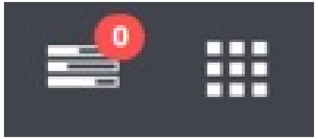
https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library

Service Based Reports

- Funding Source Financial Detail
- Client List
- Service Census
- Service Summary
- Attendance by Days Served
- Client Address / Location
- Service Issuance Summary
- Profile Details Report
- Public Alert Notice

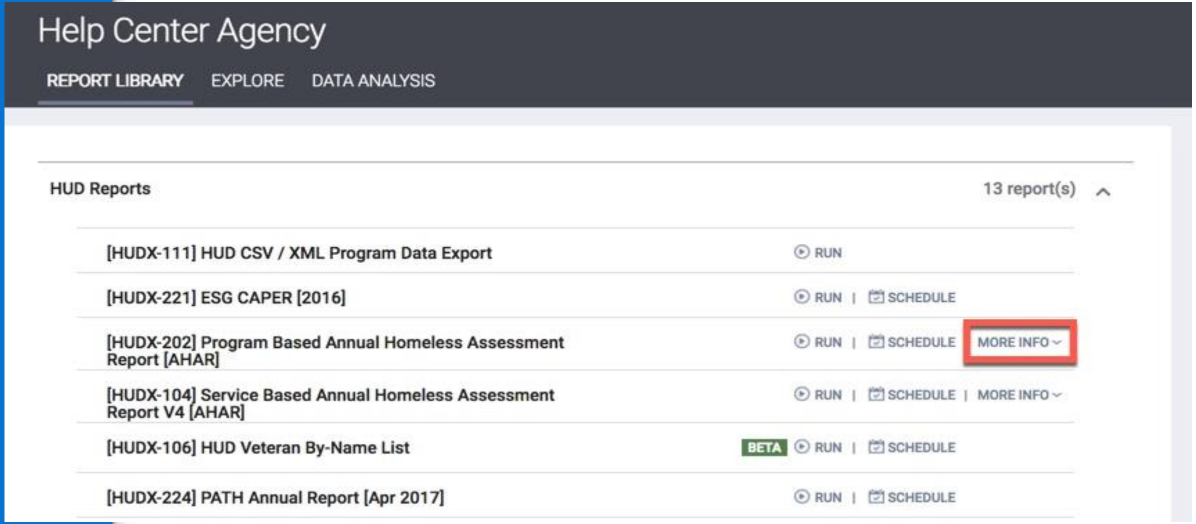
Report Library

Run: Choose your parameters and run the report. Look in the report queue for the status of your report.



Schedule: Choose date to have the report ran, then choose your report parameters

More Info: Select to see a summary of the purpose of the report



Report Library: Side Bar

Processed Reports: Lists the scheduled reports that have been processed within the last 24 hours

Scheduled Reports: Lists reports that have been scheduled

Report Library: Formats for your Reports

Web Page Format: A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.

PDF Format: The PDF is a good option for official reports, grants, etc.

Excel Format: If you download the Excel file you can use Excel to manipulate the data (e.g. Sort/Check for duplicates, etc.)

CSV: This will allow you to open in excel as a plain data table. (It will remove an “fancy” formatting the report has imbedded in it.) Easier to manipulate the data.

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Report Library:
Administrator Reports

Housing Inventory (HIC)	Designed to report on housing stock available in a community that is dedicated for homeless persons. The report also offers a point-in-time look at utilization.	Web Page PDF Excel	**Quarterly (prior to 1/31, 4/30, 7/31, 10/31)**
Annual Performance Report (APR) **and the** **ESG CAPER Report** (Emergency Solutions Grant – Consolidated Annual Performance and Evaluation Report)	A series of tables questions about service levels and outcome for the funded projects. Uploaded into Sage HMIS Reporting Repository as a CSV file. - Overview of Households served - Data Quality of Client Records (Profile) - Data Quality of Universal Data Elements (Profile, Households, enrollments) - Data Quality of Income and Destinations - Data Quality of Chronic Homelessness - Data Quality of Timeliness - Data Quality of Inactive Records - Number of Persons Served - Many other tables depending on Project Type	Web Page PDF Excel CSV-Details CSV-Upload	**Quarterly (prior to 1/31, 4/30, 7/31, 10/31)**

SACRAMENTO STEPS FORWARD

Report Library:
Administrator Reports

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SACRAMENTO STEPS FORWARD

Report Library:
Agency Management Reports

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SACRAMENTO STEPS FORWARD

Report Library:
Agency Management Reports

User Activity Report	Generate data reflecting the system activity of certain staff members	Web Page PDF Excel	As Needed
User Active Caseload	Sorted by Staff/User Fields include: Client (HoH) Name & Program Member names Unique ID DOB # of Program/Household Members Program Start Date LoS (Length of Stay) in Days # of Assessments # of Service Categories	Web Page PDF Excel	Monthly

SACRAMENTO STEPS FORWARD

Report Library:
Agency Management Reports

Staff Client Data Activity Report	Provide program management with a record of Staff/User client record activity in Clarity Human Services. The report returns the following: Sorted by Staff/User performing the activity in Clarity Type of activity Profile Created or Edited Program Enrollment Program Status Update/Annual Update Program Exit Program Follow-up Client Note Client File Client Location Assessment Referral Service Client ROI Client Name Unique Identifier Date/Time the activity occurred in Clarity, sorted by most recent to oldest	Web Page PDF Excel	As Needed

SACRAMENTO STEPS FORWARD

Report Library:
Community and Referrals

VI-SPDAT Details	Summary of VI-SPDATs conducted by selected Assessment Type within a selected date range. Sorted by Recommended Housing Intervention Included fields: - Date of Assessment - Client Name - UID - Age - Gender - Vet - Score - Scores in each VI-SPDAT Domain - Referral Made - Agency Conducting the VI-SPDAT	Web Page PDF Excel	As Needed

SACRAMENTO STEPS FORWARD

Report Library:
Community and Referrals

Coordinated Entry Compliance Report	Summary of clients actively enrolled in selected projected within selected date range and whether they have an active CQ referral. Included fields: - Individual or Group Enrollment - UID - Client Name - HoH (yes or no) - DOB - Name of Program Enrolled In - Program Start Date - Program End Date (if applicable) - Assigned Staff - Referral (yes or no) - Assessment Date - Score - Agency Conducting the VI-SPDAT	Web Page PDF Excel	Monthly

SACRAMENTO STEPS FORWARD

Report Library:
HUD Reports

HMIS Data Quality Report	HUD report that reviews data quality across a number of HMIS data elements. This report looks at similar fields as the APR report. We recommend running it to clean up Data Quality errors prior to submission of the CoC System Performance Measures (Sys PM) report or the CoC Longitunital System Analysis (LSA) report.	Web Page PDF Excel CSV	Monthly to Quarterly
Annual Performance Report (APR)	This was covered under Administrator Reports		Monthly to Quarterly
ESG CAPER Report (Emergency Solutions Grant – Consolidated Annual Performance and Evaluation Report)	This was covered under Administrator Reports		Monthly to Quarterly

SACRAMENTO STEPS FORWARD

Report Library:
Program Based Reports

Program Roster	Use for a list of Clients Active, Enrollment Start Date, or Enrollment Exit Date within a selected date range.	Web Page PDF Excel	Monthly
Program Details Report	Provides details of all Data Elements collected in each of the Program Screens: - Entry (Enrollment) Data - Status Assessment Data - Annual Assessment Data - Current Living Situation - Exit Data - Follow-Up Assessment Data	Zip with XLSX only	As Needed

SACRAMENTO STEPS FORWARD

Report Library:
Program Based Reports

Program Outcome Measures	Provides summary of Outcomes from Program Exits - Lists numbers & percentages per Discharge Destination - Lists numbers & percentages for Exits back to Homelessness - Lists numbers & percentages of Income type at Exit - Lists numbers & percentages of Unknown Destinations - Lists numbers & percentages of Length of Time to obtain Housing	Web Page PDF Excel	Quarterly
Client Demographics Report	Dashboard like report. Provides Demographic informaiton of all Clients served within the selected date range. - Age - Gender - Race - Disabled Demographic (Adults only) - Breakdown of the various forms of Disabilities (e.g., Physical, Developmental, etc.) - Chronic Homeless (Adults only) - Veterans (Adults only) - Hispanic Ethnicity - Prior Living Situation - Income	Web Page PDF Excel	As Needed

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Housing Inventory Count (HIC)

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Housing Inventory Count (HIC)

Housing Inventory Count collects information about beds and units in each Continuum of Care, by *Program Type, that are available on the designated night.

*Program Types:
Permanent Housing Projects (PSH, OPH, PH, RRH)
Transitional Housing Projects
Emergency Shelters

Typically done once per year, manually input into HMIS

Starting last year, we had to supply the HMIS project ID to HUD for this as well

The self-reported HIC was then compared to the actual inventory and clients in HMIS, and we were asked to account for any differences

ALIGNMENT IS KEY!

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HIC – LSA

The LSA also dives into each program and take a **quarterly HIC and PIT counts**

...on these dates:

Active October 31
Active January 31
Active April 30
Active July 31

SACRAMENTO STEPS FORWARD

HIC – DIY / Preview

See how you're looking on the Quarterly HIC

Active October 31, 2019
~~Active January 31~~ (future)
Active April 30, 2019
Active July 31, 2019

Run the following report:

Reports > Administrator Reports > Housing Inventory (HIC)

CoC: **CA-503**

Agency Status: **Active**

Agency Filter Category: **Agency CoC**

Agency: **Your agency**

[**All** Programs] & **Active Programs**

HIC Year: **2019**

Dates (see left)

SACRAMENTO STEPS FORWARD

Report Library:
Agency Management Reports

Housing Inventory (HIC)	Designed to report on housing stock available in a community that is dedicated for homeless persons. The report also offers a point-in-time look at utilization.	Web Page PDF Excel	**Quarterly (prior to 1/31, 4/30, 7/31, 10/31)**

SACRAMENTO STEPS FORWARD

HIC – DIY / Preview

If something looks off, please contact hmis@sacstepsforward.org

Here's what you'll see:

Households with at least 1 Adult & 1 Minor Child

units (households) and beds (people) may be different

Households with only people 18+

every adult is their own "unit"
units not collected for this type

Inventory records are manually added.

All Year-Round Beds/Units for Households...													
... with Children						... without Children					...with only Children < 18		
Beds	Units	HMIS Beds	Veteran Beds	Youth Beds	Chronic Beds	Beds	HMIS Beds	Veteran Beds	Youth Beds	Chronic Beds	Beds	HMIS Beds	Chronic Beds
2	1	2				10	10						

SACRAMENTO STEPS FORWARD

What do we, as Housing Projects, need to do?

- Check your projects inventory on a Quarterly basis at a minimum
- Provide corrections to your inventory to the SSF HMIS Team
- Respond to inventory inquiries from SSF HMIS Team

SACRAMENTO STEPS FORWARD

How will SSF HMIS Team help?

- Provide an easy to complete Google form to for you to provide corrections to your housing inventory
  - ➢ Link to Form on the HMIS Log Screen on the side bar
  - ➢ Link to the Form is on the website under Helpful Materials

  www.SacramentoStepsForward.org

- Conduct Zoom webinars on how to check your inventory and complete the Google form
  - ➢ Tuesday, January 14, 2020
  - ➢ Wednesday, January 15, 2020
  - ➢ Times to be announced

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