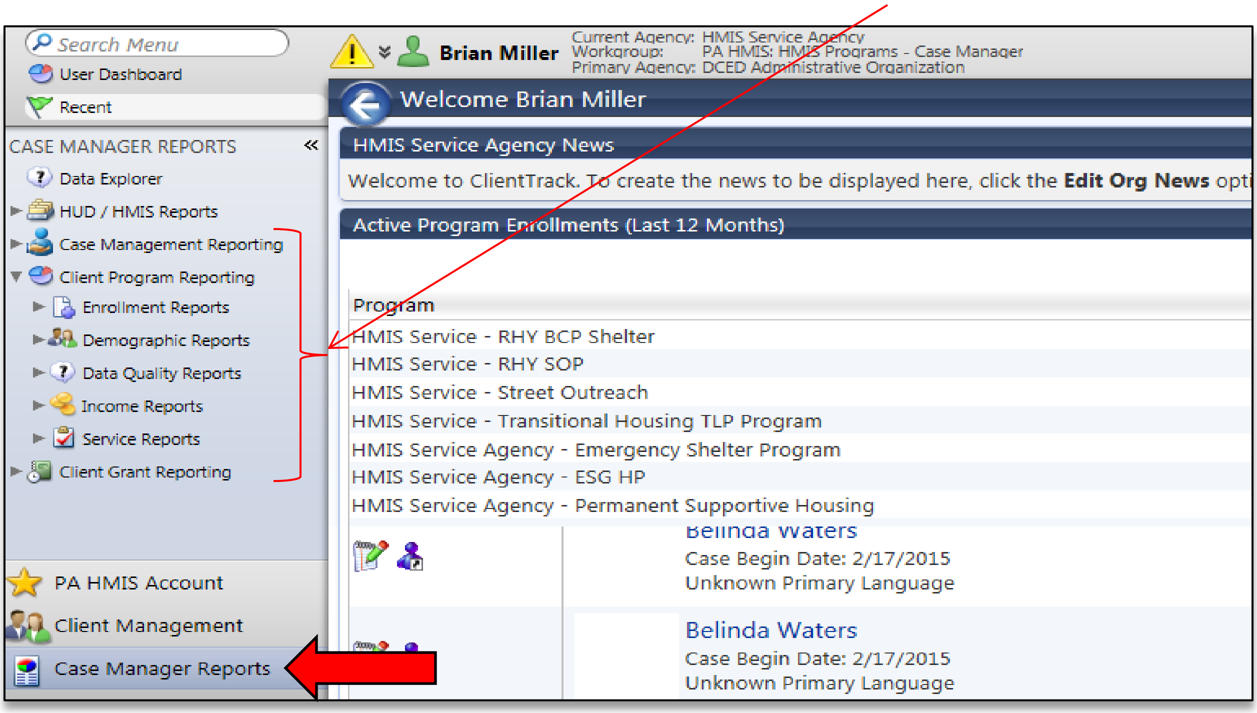
# Case Manager Report Directory Guide

We have made some updates to the **Case Manager Reports** section of the system which contains most of the reports available to organizations and their users. Over the past couple of months a multitude of new reports have been created and released into the system and with the number of the report made available continuing to grow we have decided to perform a small update to better organization them into easy to access and understand categories (folders in the system).

Under the Home -> Case Manager Reports area of the system there are now four main report folders, the HUD/HMIS Reporting which remained untouched and contains official HUD and Federal Partner reports, and three new folders that contain a large array of different client, program and grant reports.




*Please note that by selecting or clicking a category or folder, it will expand to show the contents contained within. Any category or folder with a triangle next to it can be expanded/collapsed to view/hide additional content.*

**Case Manager Reports Summary:**

The following section provides a summary listing of all reports available in the system along with short synopsis on the type of data each report is capable of providing. Please note that this summary does not include any reports within the HUD/HMIS Reporting folder.

**Client Data Report Descriptions**: the following section provides a brief description of each of the reports that can be found within the Case Manager Reports section of the system. These reports include a large part of the client data based reports in the system that fall outside the realm of HUD or HMIS required, such as APRs, CAPERs or Annual reports and can be used by all organizations and programs.

We plan to actively continue to add and update reports as needs and requested occur with the goal of being able to provide all users with any relevant information …

**Case Management Reporting**: this section contains reports based only on clients within your organization(s) and are not tied to any enrollment or enrollment information.

<u>Case Load</u>: provides a listing of all of your case assignments and can be filtered by active or non-active clients. This report is for case managers wanting a list of their current case load. There is also a "By Household" version of the report that groups all household members together.

<u>Client List</u>: provides a listing of the clients within your organization based on the date they were entered into the system and can be used for a comprehensive client list for your organization. There is also a "By Household" version of the report that groups all household members together.

<u>Client Alerts</u>: provides a listing of clients that are not enrolled into any program and/or clients that are enrolled into specific programs for longer than expected times. This report can be used to determine if clients have not been enrolled or have not exited and includes a number of filters to set the time range to best fit your organization and/or program(s).

<u>Client Goals</u>: provides a listing of a client's goals entered into the system for those that use this Case Management function

**Client Program Reporting:** this section contains reports that provide client data based on their program enrollments, since almost all reported HMIS data relies on enrollment information this section is the largest and their a number of subgroups to further separate the report types available.

*Enrollment Reports:*

<u>Client Program Usage</u>: provides a listing of clients enrolled in programs and is a very good report to review those persons that have been enrolled and/or exited from your program(s). There is also a "By Household" version of the report that groups all household members together.

<u>Client Details</u>: provides a data snapshot of each enrolled client in terms of universal data elements and can be used as a detailed version of the Client Universal Data Quality report. This report provides dashboard or datasheet style information for each of your enrolled clients.

<u>Clients Served by Location</u>: provides information based on the service location and previous Zip Code entered for each enrolled client, the data includes and is grouped on where the client was served and where the client was last reported as homeless or at-risk of homeless for geographical information. Please note that both elements are optionally collected and your organization and/or program will need to record this information in the system to allow for the data to be generated.

*Demographic Reports:*

<u>Client Demographic Query</u>: allows users to slice and dice demographic data for enrolled clients in their programs, filters included are for Age, Gender, Race, Ethnicity, Veteran Status, Disabling Condition, Domestic Violence Status, Chronic Homeless Status and Household Type. This report will allow you to only generate clients with specifically included data points, an example would be to show all clients that are Veteran Females, between 18 and 24 with a Disabling Condition that are Single (Adults Only Household).

Demographic Summary: provides a breakdown of your overall clients served in terms of their demographics and includes Race, Gender, Ethnicity and Age and aggregated counts within each of those categories.

Client Health Barriers: provides health barrier information and includes data for those enrolled clients that have been identified as having health conditions (i.e. Physical Disability, Mental Health Problems, etc.).

*Data Quality Reports:*

Client Universal Data Quality: provides a breakdown of your clients served and which clients are missing Universal Data Elements; this report has been updated to meet the new data standards of the system. This report also provides links to clients in the system to more easily update those clients with missing elements.

Client Program Data Quality: provides a complete breakdown of each enrolled clients data quality with all universal and program-specific data elements included. This is a comprehensive data quality report that can be used by all programs in the system and easily provides information on which clients and their data elements have data quality issues. There is also a “By Household” version of the report that groups all household members together.

Client Assessment Status: a basic assessment report that lists which clients have completed or not completed the main assessment categories during their enrollments. This is meant to be an overall of data quality to ensure entry and exit assessments have been completed during those enrollment processes.

*Income Reports:*

Client Income at Entry/Exit: provides income data for enrolled clients and displays income at entry and at exit (if the client has been discharged) and displays the overall change. The report is initially displayed in household form (shows income for the entire household) but can be expanded to show income from each household member.

Client Income Summary: provides an in-depth listing of every Income assessment records are a client during their enrollment and includes entry, exit and during income information. Also provides information about the total income and earned income recorded by each assessment and the enrollment as a whole.

Client Insurance/Financial Sources: provides information for which Health Insurance, Income and Non-Cash benefit Sources a client received during their enrollment, and includes information about entry, exit or during assessments. Also includes the ability to filter clients by these sources, an example would be to show only those clients with Earned Income, Medicare and Food Stamps in the same enrollment. There is also a “By Household” version of the report that groups all household members together.

*Services Reports:*

Client Enrolled Services: provides a listing of all direct services provided to clients during their program enrollments. This report shows total service counts on a per organization, program and client basis and can be expanded to display each service a client had received, the type and the amount. This report is highly recommended when looking to review your services provided data in the system.

**Client Grant Reporting:** this section contains reports that provide client data based on their program enrollment's funding through Grants in the system. These reports will be most beneficial to Grant Administrators to be able to oversee their service provider's client data for programs in which they fund.

Client Program Usage: provides a listing of clients enrolled in programs that are funded by your organization's Grant and is a very good report to review those persons that have been enrolled and/or exited from those program(s).

Client Program Data Quality: provides a complete data quality breakdown of each client enrolled into programs funded by their organization's Grant. This is a comprehensive data quality report that can be used by all programs in the system and easily provides information on which clients and their data elements have data quality issues.

**Case Manager Reports Directory:**

The following section provides a detailed listing of the reporting directory structure and the reports contained within each category.

**HUD/HMIS Reporting**

- APR for CoC Funded Projects
- AHAR By Program Type
- AHAR Summary
- Emergency Solutions Grant (ESG) CAPER
- Emergency Solutions Grant (ESG) CAPER CR-10
- PATH Annual Report
- Homeless Assistance Program (HAP) Report
- HUD Point in Time (PIT) Report
- SSVF Dashboard Report

**Case Management Reporting**

- Case Load
- Case Load by Household
- Client List
- Client List by Household
- Client Alerts
- Client Goals

**Client Program Reporting**

*Enrollment Reports:*

- Client Program Usage
- Client Program Usage by Household
- Client Details
- Clients Served By Location

*Demographic Reports:*

- Client Demographic Query
- Client Demographic Summary
- Client Health Barriers

*Data Quality Reports:*

- Client Universal Data Quality
- Client Program Data Quality
- Client Program Data Quality by Household
- Client Assessment Status

*Income Reports:*

- Client Income at Entry/Exit
- Client Income Summary
- Client Insurance/Financial Sources
- Client Insurance/Financial Sources by Household

*Services Reports:*

- Client Enrolled Services

**Client Grant Reporting**

- Client Program Usage
- Client Data Quality