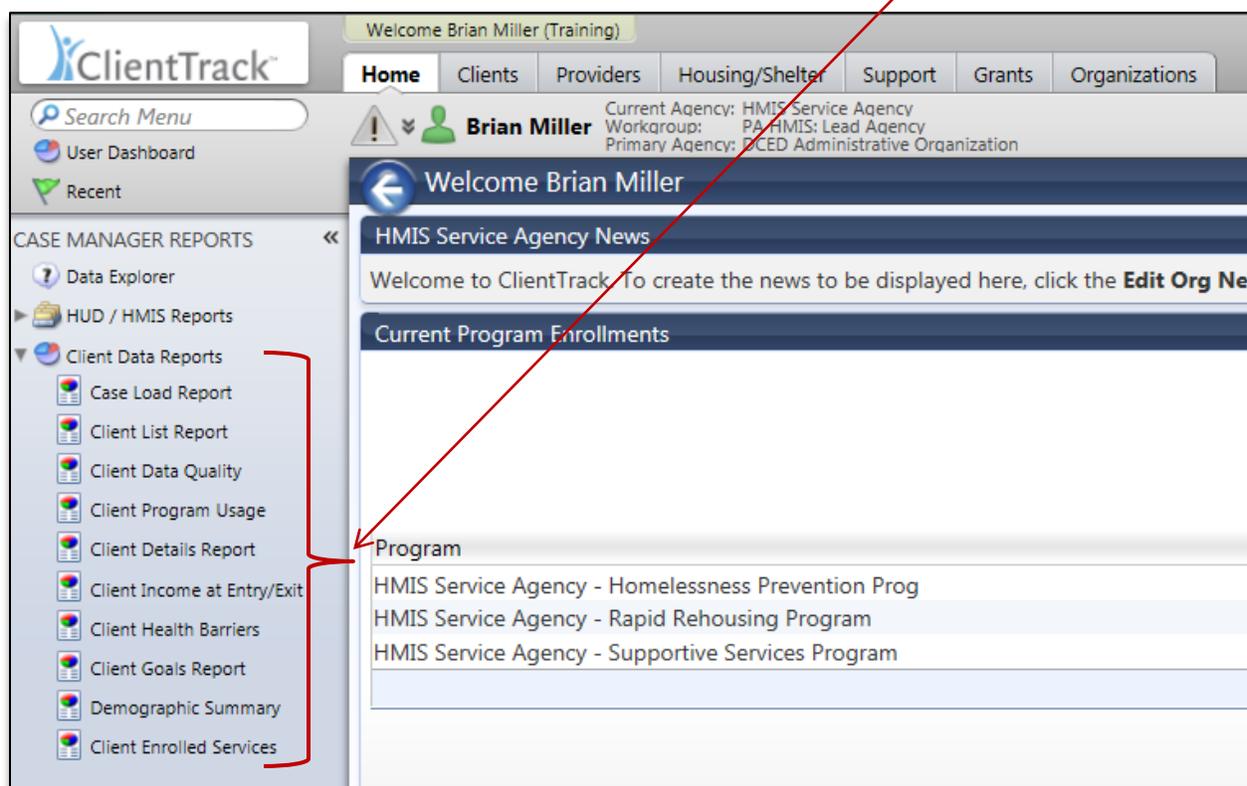# Client Data Reporting Guide

The following guide provides information on locating and running different types of reports specific to reviewing your client and program data in the new HMIS system.   All of these reports are located under your Home -> Case Manager Reports area and are located within the "Client Data Reports" folder.



The new PA HMIS system has a number of reports that can be used to review and report on a number of different client and program related data within your organization.  Almost all of these reports provide data in regards to program enrollments and generate data in a per program/project basis, although multiple projects can be combined on the same report.

*The Case Load Report and Client List Report generate data based on organizational not project enrollment based relationships and both can be used to provide general client lists.*

**Standard Report Filters:** all reports have three main filters that need to be selected and configured to generate the proper client data, although many of the reports have additional filters that can be used to include or exclude different elements.

*Date Range*:  these reports allow you to enter in a date range which will determine which clients served to include.  You can use the new predefined time ranges or can manually enter in your dates.

*Please note that many reports have options on the type of clients to include, such as "Enrolled at Any Time", "Begin Enrollment" and "Exited" to further filter the data.*

*Organization(s)*: the reports will require you to select the organization in which you want to report on and most of the time will automatically select your organization for you (defaults if you have access to only a single organization).



*Project(s):*  the reports provide an option to select a specific program for which you want to include on the report.   Based on the organization selected the system will display all programs available under the organization from which to select.   You will need to select the "Filter by Project(s)" option to allow the system to display your projects.



*Please note that other than the Date Range and Organization, most of the other filters are optional. When a filter is not selected, the report will assume you want all data from that filter included (always defaults to 'Include All').*
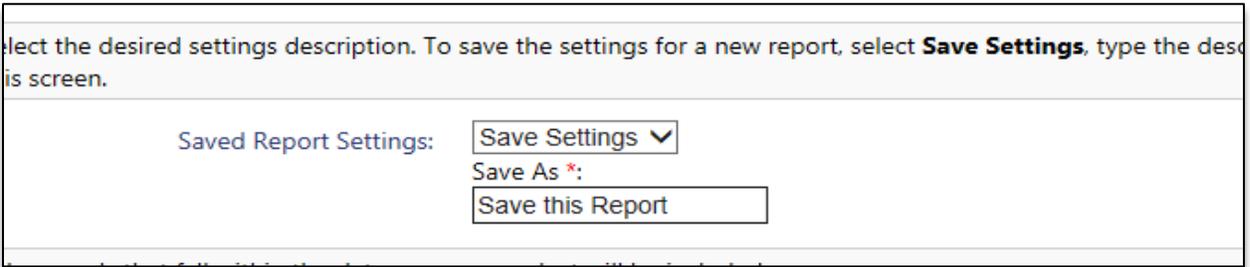
**Run the Report**:  once the report filters have been properly set, simply select the "Report" button on the bottom right-hand side of the screen, this will generate the appropriate report.

The report will appear in a new window on your screen and will contain, on the top menu bar, a number of options in which to export the report into different formats, such as PDF, Excel, Word, etc.

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**Additional Report Options**: there two additional options available on all reports that many users should find very useful.

*Saved Report Settings:* this option will allow users to the ability to create and save a specific version of the report, in terms of the report filters. This will allow the user to re-use this same report without having to go through the entire setup more than once.

To save a report version, select the "Save Settings" option and enter in a name. When running the report, the system will save all the report filters entered for reuse.

lect the desired settings description. To save the settings for a new report, select **Save Settings**, type the des
is screen.

| | |
|---|---|
| Saved Report Settings: | Save Settings ∨ |
| | Save As *: |
| | Save this Report |

When entering the report, you can select any of the previously saved reports from the same drop-down and the filters will load on the screen.

*Schedule Report*: this option allows users to schedule a report to be run and sent to them on a periodic interval (i.e. daily, weekly or monthly). This option is located next to the Report option on the bottom right hand corner of the screen and is also available for all reports.

Enter in the basic setup options, which include frequency, start date and export format and save the information to save and start the auto-generation process. This is a great feature to check on weekly or monthly client data figures, especially for data quality or enrollment/exit style reports.
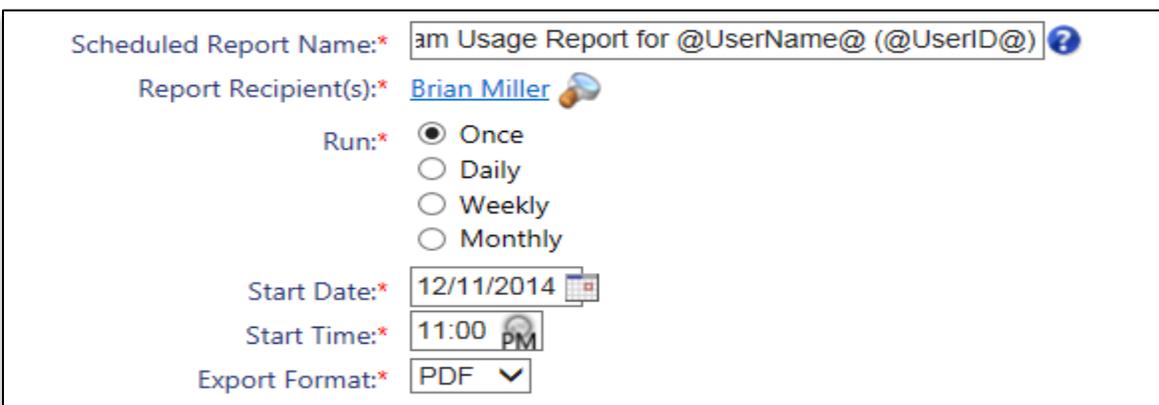
| | |
|---|---|
| Scheduled Report Name:* | am Usage Report for @UserName@ (@UserID@) ❓ |
| Report Recipient(s):* | Brian Miller 🔍 |
| Run:* | ◉ Once |
| | ○ Daily |
| | ○ Weekly |
| | ○ Monthly |
| Start Date:* | 12/11/2014 📅 |
| Start Time:* | 11:00 PM |
| Export Format:* | PDF ∨ |

Please note that do to security concerns the system will not email the report to you directly, but you will receive and email that contains a link to the report. When selecting the link if you are not logged into the system you will be prompted with your logon information, after which the system will provide the scheduled report.

**Client Data Report Descriptions**:  the following section provides a brief description of each of the client data reports and the type of data included within each.   Please note that these reports are only a starting point and we do have plans to add more reports to the system for a number of different data areas as we receive feedback on the system.

Case Load Report: 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.

Client List Report: provides a listing of the clients within your organization and this report provides a number of additional demographic and grouping options to better include or exclude client data from the report.  This report does not provide data based on program enrollments and can be used for a comprehensive client list for your organization.

Client 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 Usage: 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).

Client Details Report: 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 Data Quality report.  This report provides dashboard or datasheet style information for each of your enrolled clients.

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 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.).

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 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.