Contents

Review of Operational Reports:
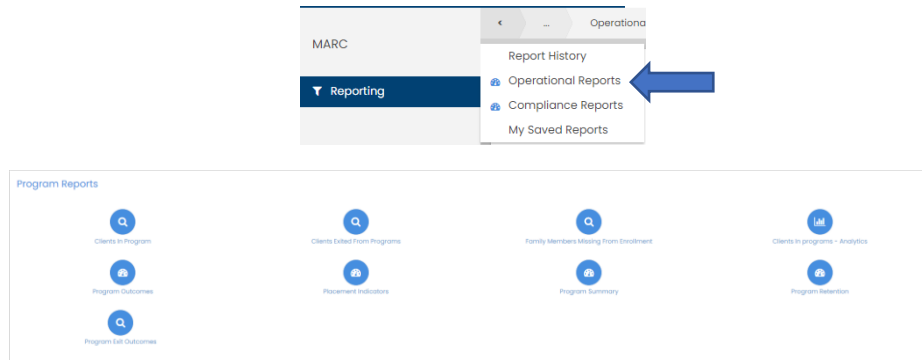
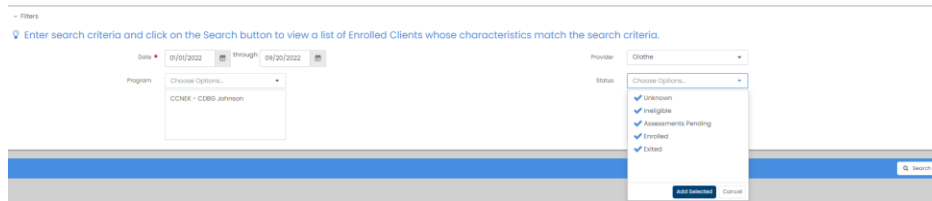# Clients in Program

Clients In Program

1. Data is provider specific - if an enrollment has a different provider than what was selected in the report set up, then those enrollments won't show on the report view
2. The user can choose to leave both Provider and Status blank which will avoid excluding certain records.
3. You can select as many status options as you prefer

4. This report view will show everyone who was in the program within the report date range
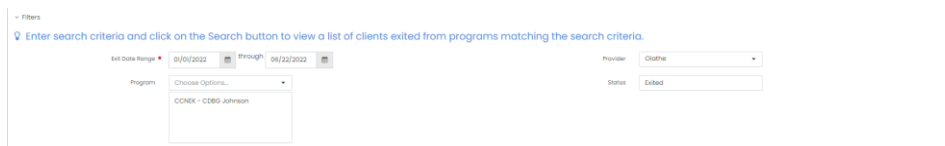

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Client Exited from Program

Clients Exited From Programs

1. Data is provider specific - if an enrollment has a different provider than what was selected in the report set up, then those enrollments won't show on the report view
2. The user can choose to leave Provider blank which will avoid excluding certain records.
3. The only status option is 'Exit'

4. This report view will show everyone who exited within the report date range if any

Program Name	Begin Date - End Date		Days Enrolled	Client Name	Ethnicity	Exit Type

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Family Member Missing from Enrollment

Family Members Missing From Enrollment

1. This report will show the list of family members who are part of a family but are not enrolled in the selected program.
2. This is not necessarily an error. There are instances where the Head of Household and other members are enrolled in a program while some members of that family are not.

3. To evaluate, look up the client ID showing on the report. Click on project enrollment

Project Enrollment

4. If the project does not show on the list for this client, then they are not attached to the enrollment.

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Program Outcomes

Program Outcomes

1. This report will only work if the outcomes feature is used in program set up.
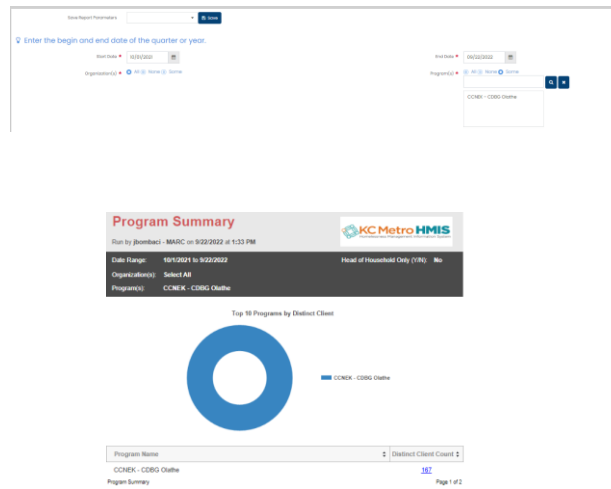

2. End date refers to 12 month period of time ending on the end date provide

End Date ★ __/__/____ 🗓

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Program Summary Report
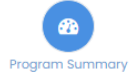
Program Summary

1. Program Summary Report provides the client count of 1 or more programs
2. The Detail export provides basic info of the client enrolled in the program during the report period
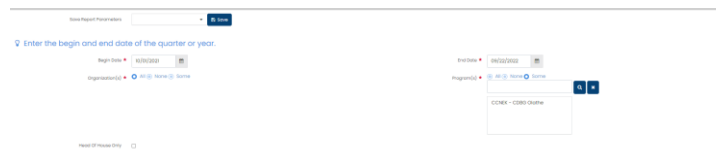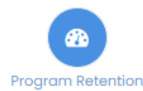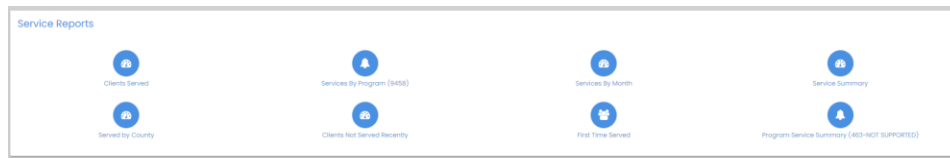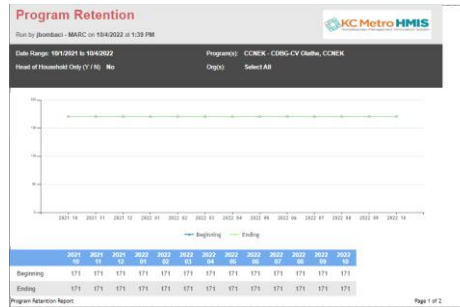3. No real value to this report – APR would be more useful


Program Retention

Don't see how this report can be useful unless a program has a specific target for keeping a client engaged – where enrollment length was a measure of success.


Program Retention

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Services Reports: *Keep in mind, if you run the report on more than one program, you will need to use the page arrows to see the results for each program.*

Clients Served

Clients Served
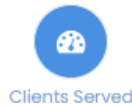
1. This report provides information on everyone enrolled in a program. And if there are services, the report will provide a summary of services.
2. The user has various options to select from to refine the report. They can be left as 'all'
3. The user must select a 'group by' option. Each option will breakdown the report results based on the option selected. For example, if age group is selected you will see the report summary split out by age group, showing the counts by age group and services totals by age group.

4. The report summary provides an overview of the totals by category.
5. The user can click on the hyperlinks to access detailed information
6. If you have selected more than one program you will need to click on the page arrow to move from one program to another.
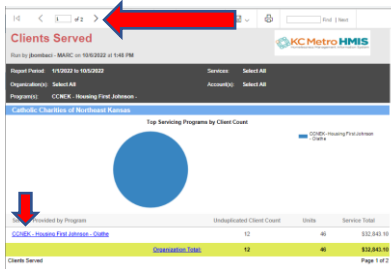
7. The hyperlink associated with the program name brings you to very basic information on the client records.

8. Note the '+' icon next to the client ID. This will expand the row to show the itemized service history for this record.

9. Click on the organization hyperlink to get a slightly different view of the client data

10. The client ID hyperlink brings you to an itemized view of the client service information

11. The two hyperlink options essentially provide similar information with some slight variation.

Services by Program

Services By Program (9458)

1. The services by program report provides a breakdown of all services provided in a summary format
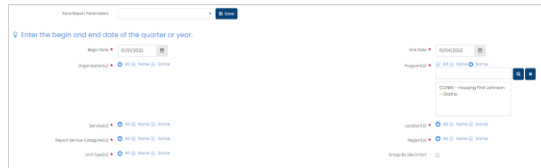
2. The user can see the breakdown of service types, the total number of services for each type along with any costs associated with that service. Since services are generally tracked against the head of household record, the view also provides the total number of other family members benefiting from the service
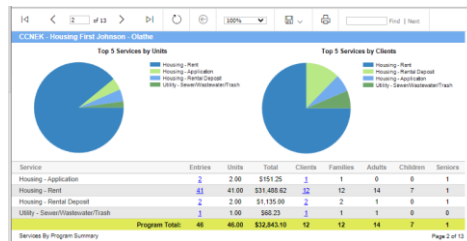
3. The user can click on any of the 'blue' hyperlinks to get detail information about each service tallied in the report. If a client received more that one service then they will show multiple times on the report to represent each transaction.

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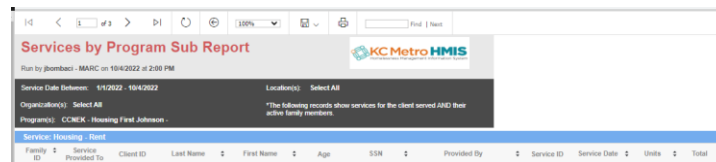
Services By Month

Services By Month

1. The Services by Month report will provide a breakdown of the services by each month within the report range. It will only show full month data. It will not show partial month data. So if you run the report from 7/1/2022-10/6/2022, the report will stop at 9/30/2022

2. The user can click on the hyperlink to see detailed information showing each transaction.

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Service Summary

Service Summary

1. The Service Summary report allows the user to run the report by organization and by location (provider). This will provide all the services associated with programs assigned to that provider and client enrollments that are set to that provider.
2. If you aren't seeing all the services you expect to see in this report, make sure to check the detail report to review the client ID's and each service associated with that ID
3. If a service or client record is missing, you will need to check that enrollment to make sure that the enrollment and service are linked to the correct provider.

4. The report will show a breakdown of each service showing the total instances along with the amounts.
5. Also, similar to the other services reports, services are generally tracked against the head of household record, the view also provides the total number of other family members benefiting from the service
6. The user can click on the hyperlink to see the detail information for each service category

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Served by County

Served by County

1. The Served by County report is not a services report but a report of people enrolled in the program or programs with in a particular county. This is a report of those Served not those with services.

2. The report gives a total count of persons and households and breaks that down by county. If you run the report on more than one program then you will need to click the page arrow to see the other programs.

3. The user can click on the hyperlink to see the detailed information for each client record served in the program.

Clients Not Served Recently

Clients Not Served Recently

1. The Clients Not Served Recently report will show a detailed view of clients without a service from the effective date provided in the report set up to the number of days entered in the 'Days Past' field
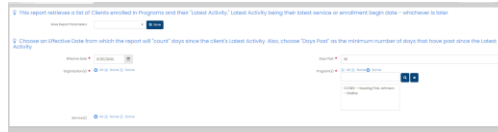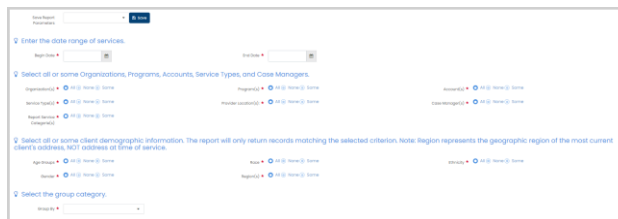

2. The detail report will provide basic information including the enrollment start and end date, days since last service and the relation to Head of Household. This column is important b/c in most cases only the person marked as 'self' receives the service. But if other members should also be receiving services, this report will help identify those missing a service.

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First Time Served

First Time Served

1. Was not able to get this report to populate with data so not exactly sure what its purpose is

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Program Service Summary

Program Service Summary (463-NOT SUPPORTED)

1. The Program Service Summary behaves similar to the Services by Program and Service Summary reports.
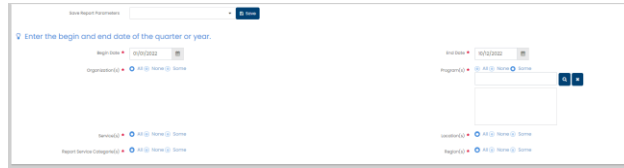
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User Login

User Login

1. User Login report will provide a breakdown of who from a particular agency has logged in, date of login and duration of login.
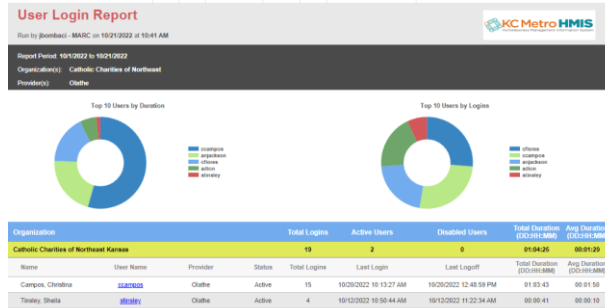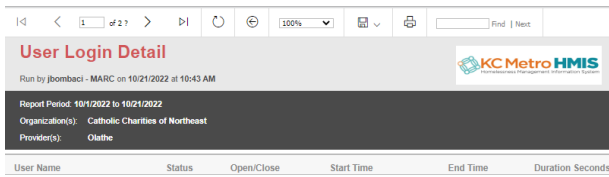2. The report could be useful for a program manager to make sure staff are logging regularly.

3. The report will show a breakdown of the user, provider and login in history.

4. The detail will provide similar info as the primary report.

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Case Load Report

Case Load

1. The case load report will provide a breakdown of the enrollments assigned to a case manager.
2. This report can be useful for a program manager to maintain case loads but the key is that the user be assigned to an enrollment in order to show on this report
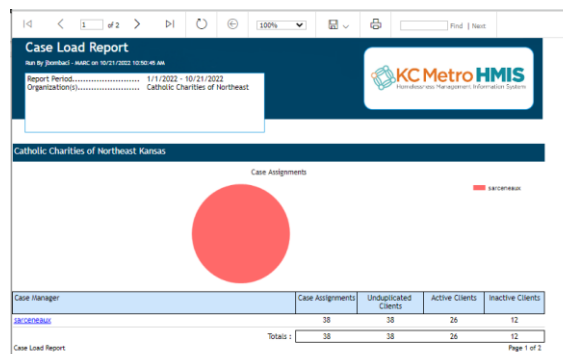3. The report can also be used to determine which staff have not been assigned.

4. The report will show the number of client records assigned to the case manager as well as both open and closed enrollments

5. The detail export will provide a specifics on the clients records assigned to the case manager.

Case Load Detail Report
Run By jbombaci - MARC on 10/21/2022 10:49:57 AM

Report Period........................ 1/1/2022 – 10/21/2022
Organization(s)...................... Catholic Charities of Northeast Kansas

KC Metro HMIS
Homelessness Management Information System

Catholic Charities of Northeast Kansas

Client ID	Family ID	Last Name	First Name	Middle Name	SSN	Age	Program Name	Enrollment Begin Date	Enrollment End Date	Status