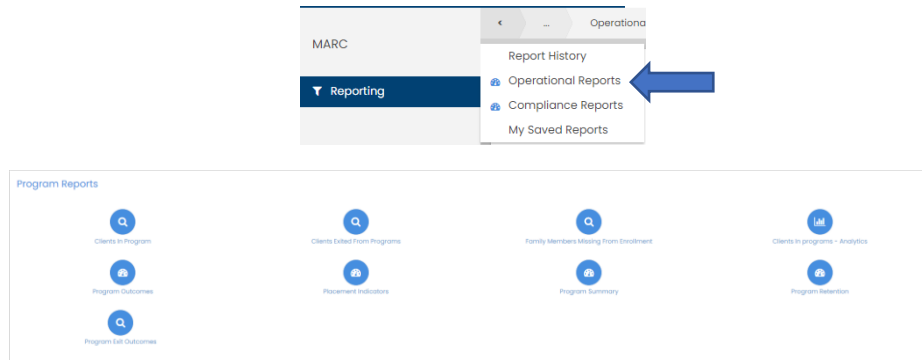


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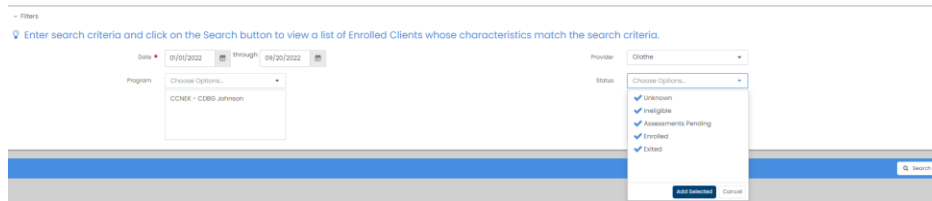
Review of Operational Reports:



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

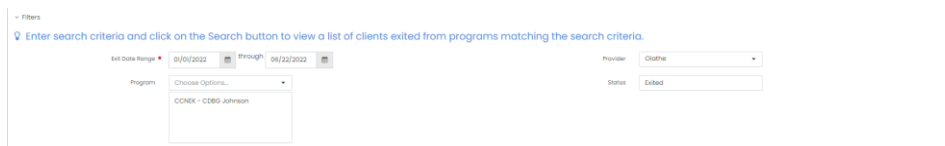
The screenshot shows the data table for the 'Clients in Program' report. The table has the following columns: Client ID, Client Name, Begin Date, Program Name, End Date, Days Enrolled, Ethnicity, and Enrollment Status. The first row of data is as follows:

Client ID	Client Name	Begin Date	Program Name	End Date	Days Enrolled	Ethnicity	Enrollment Status
64370	[REDACTED]	1/1/2017	CCNEX - CDBO Johnson	Open	1782	Non-Hispanic/Non-Latin(a)(o)(s)	Enrolled

Client Exited from 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 Provider blank which will avoid excluding certain records.
3. The only status option is 'Exit'



- 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
--------------	-----------------------	---------------	-------------	-----------	-----------

Family Member Missing from Enrollment



Family Members Missing From Enrollment

- This report will show the list of family members who are part of a family but are not enrolled in the selected program.
- 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.

Filters

Select a Program. The form will display family members missing from an existing family enrollment for that program.

Program: CCNEK - CDBG Johnson

Total Rows: 258

ClientID	Last Name	First Name	Family Name	Program Name	Family Enrollment Begin Date	EnrollmentID
307085			Allyn,Melissa-1985-09-29	CCNEK - CDBG Johnson	3/8/2020	2875736

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



Project Enrollment

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

Status	Project Assigned Case Mgr	Project Start - End Dates	Provider	Organization	Family	One Time Fields	Enrollment ID
--------	---------------------------	---------------------------	----------	--------------	--------	-----------------	---------------

Program Outcomes



Program Outcomes

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

Program Outcomes Summary Report

Save Report Parameters

Enter the end date of the year:

End Date: [Date Picker]

Report to Client/Track: Count

Organization: All (None) Some

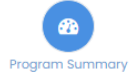
Demographics: All (None) Some

ProgramID: All (None) Some

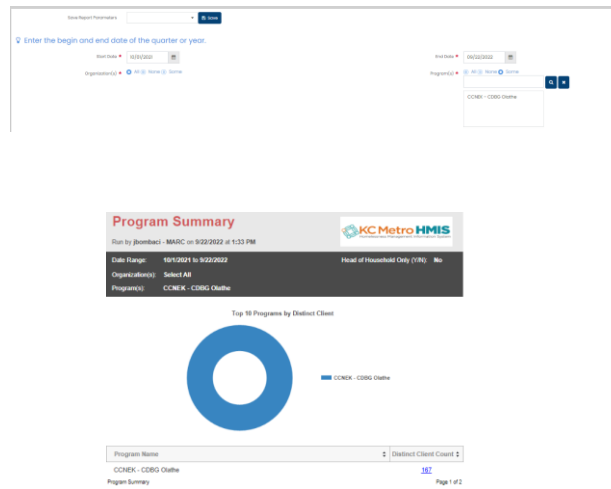
- End date refers to 12 month period of time ending on the end date provide

End Date * [Date Picker]

Program Summary Report



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

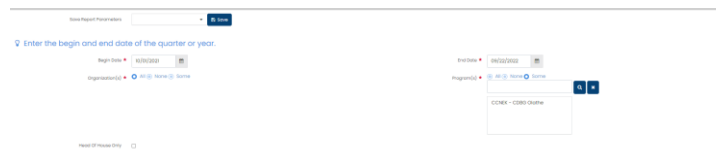
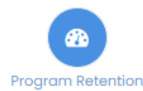


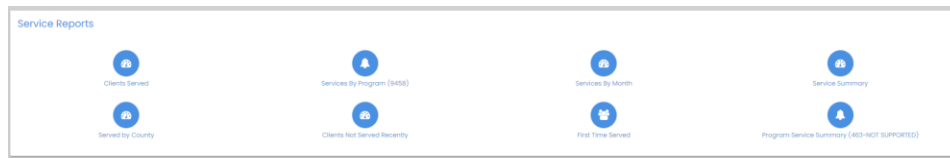
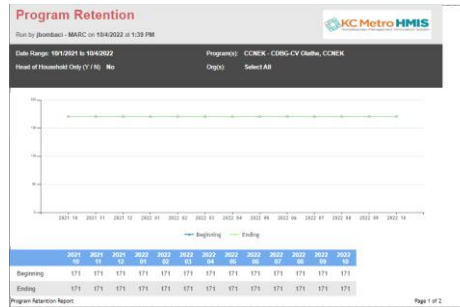
The screenshot shows the 'Program Summary Detail' report interface. At the top, there are filters for 'Start Date' (10/1/2021) and 'End Date' (9/22/2022). Below the filters, the report title 'Program Summary Detail' is displayed, along with the user 'jbombaci - MARC' and the date '9/22/2022 at 1:34 PM'. The 'Date Range' is '10/1/2021 to 9/22/2022' and 'Head of Household Only (Y/N)' is 'No'. The 'Program' is 'CCNEK - CDBG Olathe...'. Below this, a table is shown with the following columns: Client ID, Last Name, First Name, Family Name, SSN, Age, Begin Date, and End Date. The 'Distinct Client Count' is 167.

Client ID	Last Name	First Name	Family Name	SSN	Age	Begin Date	End Date
[Table content is obscured]							

Program Retention

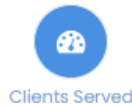
Don't see how this report can be useful unless a program has a specific target for keeping a client engaged – where enrollment length was a measure of success.





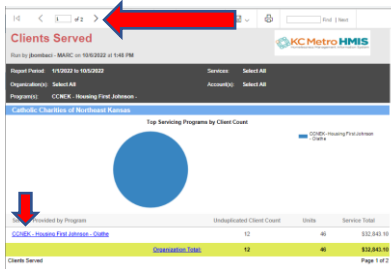
Services Reports: *Keep in mind, if you run the report on more than one program, you will need to use the page arrows to see the results for each program.*

Clients Served



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.



- The hyperlink associated with the program name brings you to very basic information on the client records.
- Note the '+' icon next to the client ID. This will expand the row to show the itemized service history for this record.

Clients Served Detail

Run by jbombaci - MARC on 10/5/2022 at 10:44 AM

Report Period: 1/1/2022 to 10/5/2022 Services: Select All
 Organization(s): Catholic Charities of Northeast Account(s): Select All
 Program(s): CCNEK - Housing First Johnson -

Catholic Charities of Northeast Kansas

Client ID	Last Name	First Name	Birth Date	Ethnicity	Race	Gender	Age Group	Units	Service Total
544443			09/08/1995	Hispanic or Latin(a)(o)(x)	Asian or Asian American/Black African American or African American	Female	24-44	2	\$2,048.00

Service	Location	Case Manager	Begin Date	Address At Time of Service	Units	Service Total
Housing - Rent	Olathe	Tinsley, Sheila	01/19/2022	8008 Perry Street Overland Park, KS	1	\$1,024.00
Housing - Rent	Olathe	Tinsley, Sheila	02/23/2022	8008 Perry Street Overland Park, KS	1	\$1,024.00

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

Catholic Charities of Northeast Kansas

Top Servicing Programs by Client Count

Service Provided by Program	Unduplicated Client Count	Units	Service Total
CCNEK - Housing First Johnson - Olathe	12	46	\$32,843.10
Organization Total	12	46	\$32,843.10

Clients Served Total Detail

Run by jbombaci - MARC on 10/5/2022 at 10:48 AM

Report Period: 1/1/2022 to 10/5/2022 Services: Select All
 Organization(s): Catholic Charities of Northeast Account(s): Select All
 Program(s): CCNEK - Housing First Johnson -

Client ID	Last Name	First Name	Birth Date	Ethnicity	Race	Gender	Age Group	Case Manager	Location	Program	Begin Date	Units	Service Total
580232	Baskin	Isandra	03/27/1979	Non-Hispanic/Latin(a)(o)(x)	Black African American or African American	Female	24-44	Campos, Christina	Olathe	CCNEK - Housing First Johnson - Olathe	03/16/2022	4.00	\$1,915.00

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

Clients Served Service Detail

Run by jbombaci - MARC on 10/5/2022 at 10:54 AM

Report Period: 1/1/2022 to 10/5/2022 Services: Select All
 Organization(s): Catholic Charities of Northeast Account(s): Select All
 Program(s): CCNEK - Housing First Johnson -

600101 - Baskin, Isandra

Service	Begin Date	Units	Service Total	Address at Time of Service
Housing - Rent	03/16/2022	1.00	\$450.00	8243 Forest Ave Kansas City, MO
Housing - Rent	04/19/2022	1.00	\$450.00	8243 Forest Ave Kansas City, MO
Housing - Rent	01/19/2022	1.00	\$0.00	8243 Forest Ave Kansas City, MO
Housing - Rent	02/23/2022	1.00	\$955.00	8243 Forest Ave Kansas City, MO

Clients Served Detail Page 1 of 1

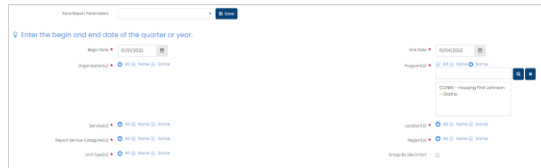
- The two hyperlink options essentially provide similar information with some slight variation.

Services by Program

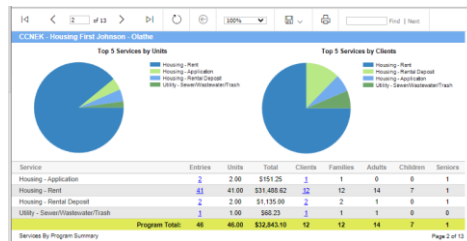


Services By Program (9458)

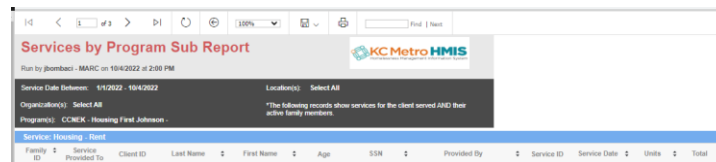
1. The services by program report provides a breakdown of all services provided in a summary format



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 than one service then they will show multiple times on the report to represent each transaction.



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

Enter the Start Date and End Date for the reporting period.

Month: 10/2022

Organization: Catholic Charities of Northeast Kansas

Location: Catholic

Report Service Category: CCNEX - Housing First Johnson

Run Report

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

Monthly Service Summary
Run by jboombaci on 10/6/2022 at 1:37 PM

Report Period: 7/1/2022 to 10/6/2022 Services: Select All
 Organization(s): Select All Location(s): Select All
 Program(s): CCNEX - Housing First Johnson

Service	Totals	Jul 2022	Aug 2022	Sep 2022	Oct 2022
Housing - Rent	3,250.81	\$1,700.00	\$475.00	\$1,115.81	
Housing - Rental Deposit	600.00			2,800.00	
Total for CCNEX - Housing First Johnson - Catholic Program	3,750.84	1,700.00	475.00	1,885.84	
Total for Catholic Charities of Northeast Kansas Organization:	3,750.84	1,700.00	475.00	1,885.84	

Service By Month Report Page 1 of 2

Service Summary



- 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.
- 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
- 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.

Enter the begin and end date of the reporting period.

Month: 10/2022

Organization: Catholic Charities of Northeast Kansas

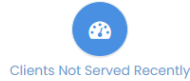
Location: Catholic

Report Service Category: CCNEX - Housing First Johnson

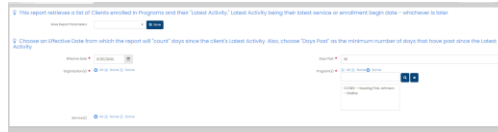
Run Report

- The report will show a breakdown of each service showing the total instances along with the amounts.
- 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
- The user can click on the hyperlink to see the detail information for each service category

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



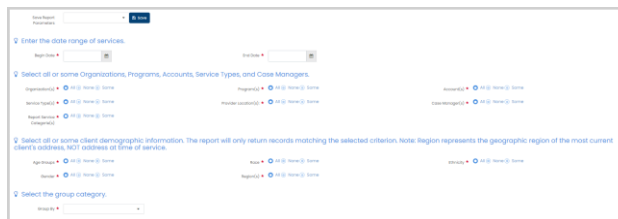
2. The detail report will provide basic information including the enrollment start and end date, days since last service and the relation to Head of Household. This column is important b/c in most cases only the person marked as 'self' receives the service. But if other members should also be receiving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

Client ID	Last Name	First Name	Birth Date	Program Name	Enroll Date - End Date (Enrollment Member)	Last Activity (Last Service Date)	Days Since Last Activity	Relation To Head
[Table content is mostly obscured by a watermark]								

First Time Served



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



Client ID	Last Name	First Name	Birth Date	Program Name	Enroll Date - End Date (Enrollment Member)	Last Activity (Last Service Date)	Days Since Last Activity	Relation To Head
[Table content is mostly obscured by a watermark]								

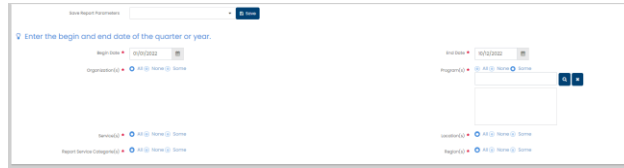
Client ID	Last Name	First Name	Birth Date	Program Name	Enroll Date - End Date (Enrollment Member)	Last Activity (Last Service Date)	Days Since Last Activity	Relation To Head
[Table content is mostly obscured by a watermark]								

Program Service Summary



Program Service Summary (483-NOT SUPPORTED)

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



Program Service Subreport table showing client details for 'Service: Utility - Electric Arrears'. The table has columns: Client ID, Full Name, SSN, Provided By, Service Date, Units, and Total.

Client ID	Full Name	SSN	Provided By	Service Date	Units	Total

User Login

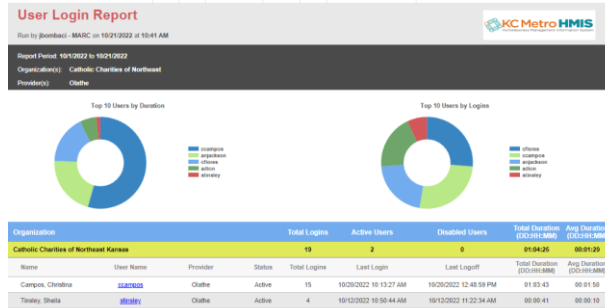


User Login

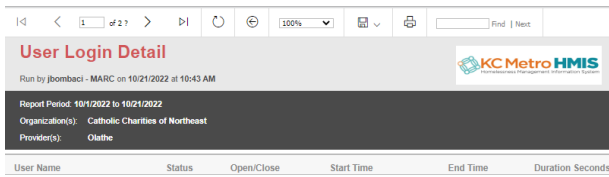
1. User Login report will provide a breakdown of who from a particular agency has logged in, date of login and duration of login.
2. The report could be useful for a program manager to make sure staff are logging regularly.



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.



Case Load Report



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.

Case Report Parameters

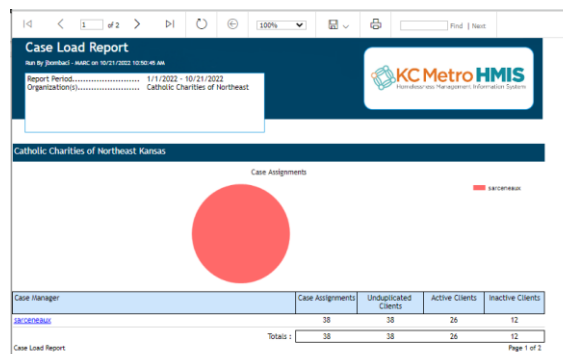
Enter the begin and end date of the reporting period.

Begin Date: 10/17/2022
End Date: 10/21/2022

Organization(s): Catholic Charities of Northeast
Provider(s): KANSAS

Case Manager(s): Alan, Nick; Alexandra, Sylvia; Bailey, Bruce; Bailey, Christine

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 jborndt - HMC on 10/21/2022 10:49:37 AM

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



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
-----------	-----------	-----------	------------	-------------	-----	-----	--------------	-----------------------	---------------------	--------