SANTA BARBARA COUNTY CONTINUUM OF CARE

Homeless Management Information System

COUNTY of SANTA BARBARA
HOUSING & COMMUNITY DEVELOPMENT
one COUNTY one FUTURE

February 2025

Non-Administrators Reports Manual

Community Technology Alliance
333 West San Carlos • Suite 600
San Jose, CA 95110
www.ctagroup.org

Table of Contents

Overview

The Non-Administrators Reports Manual details the reporting features available to all HMIS users. Reports can be generated for:

- Individual clients from the client's profile page, or;
- A specified program or project type by.

HMIS users with administrative level access also have access to Administrative Reports. The Administrative Reports feature allows those with access to this feature to run reports for all programs for their agency.

There is also a Data Analysis tool which allows select users to interact with the data in order to understand trends and patterns.

Both the Administrative Reports and Data Analysis Tool are covered in a separate Reports Manual.

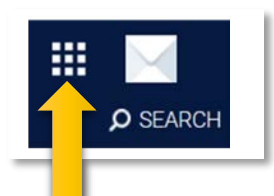
<u>How do I access:</u>

Individual Client Reports

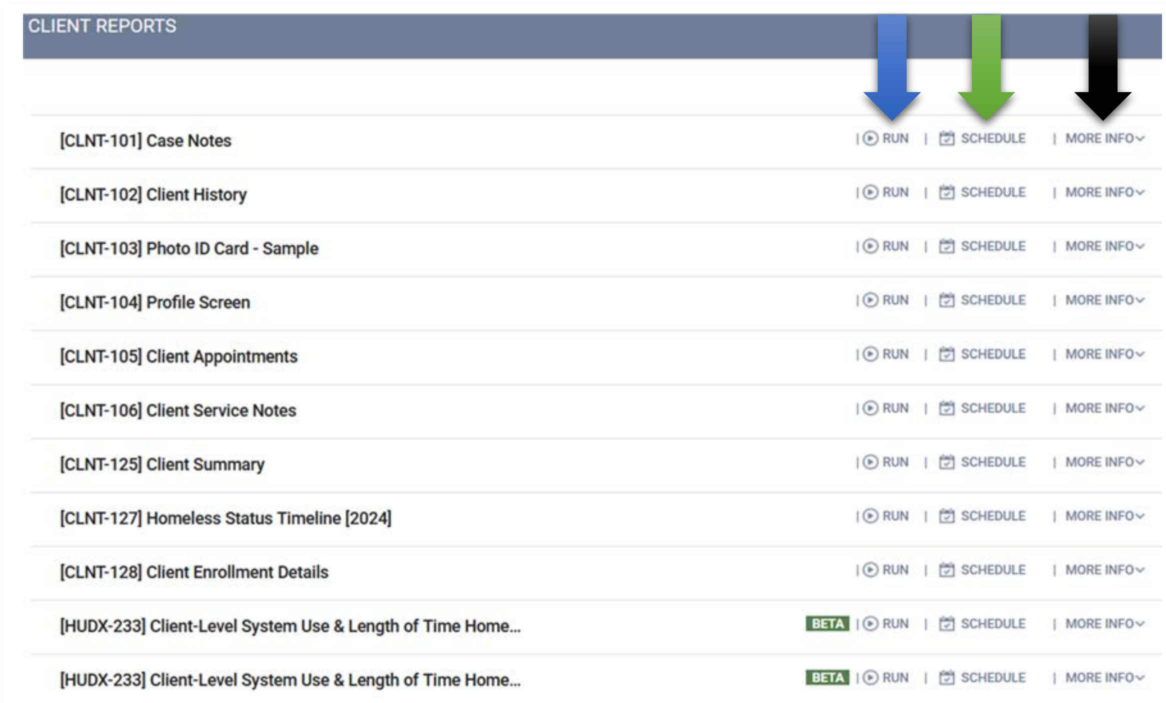
- Search for the client, then click on the client's name to access their profile page
- Look for the 3 icons on the right side of the screen
- Click on the printer icon (green arrow)
- Client **Reports** will display (see page 3 for details)

Program Reports

- Click the square icon (yellow arrow) at top right of screen
- Click **Reports**
- The **Report Library** will display (see page 4 for details)



Overview



Individual Client Reports
Clicking the printer icon displays the following reports:

- Click **Run** (blue arrow) to enter prompts and generate a report
- Click **Schedule** (green arrow) to enter prompts and run the report at a later date
- Click **More Info** (black arrow) to see if there is an explanation about the report

Locate the report, then click Run or Schedule:

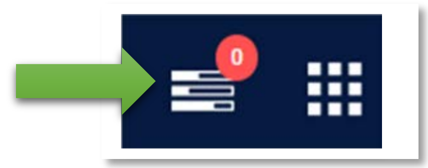
- The prompts for the report will display
- Enter prompts (example: report date range)
- Select **Report Output Format**
- Click **Submit**

What is **Report Output Format**?

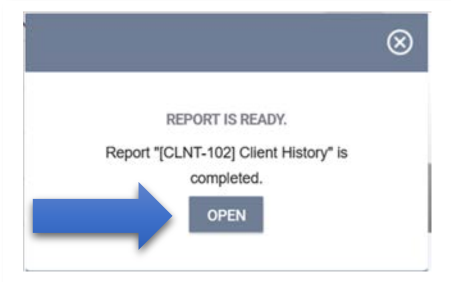
- **Web Page**: Select to display report as a web page. A new tab opens up on your browser to display the report
- **PDF**: Select to download as a PDF document
- **Excel**: Select to export to an Excel spreadsheet

Overview

A new icon will display (top right of screen) after clicking **Submit.** If this is the first report submitted, the number 0 will display (green arrow).



- The zero will turn to the number 1 when the report is ready. Click on the number, then click **Open** to display the report
- A pop-up window will also display, stating the report is ready. You can also access the report by clicking Open (blue arrow)



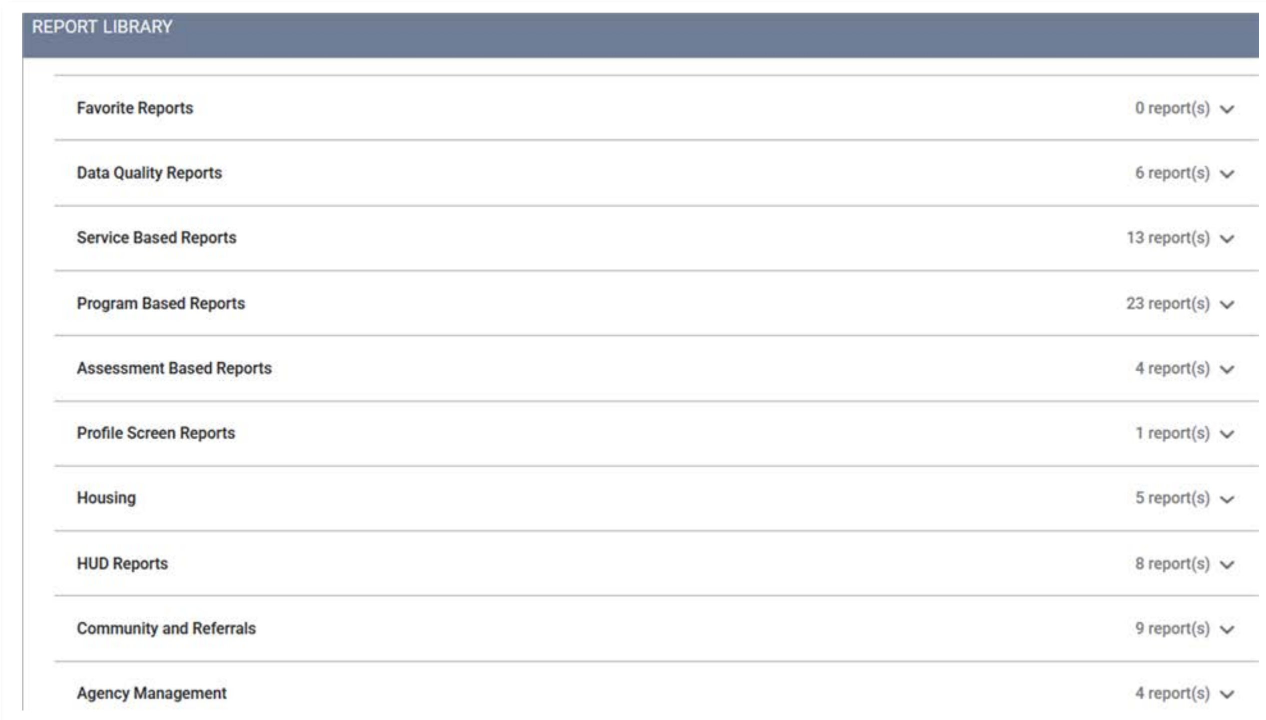
Overview

Program Reports
Clicking on the square icon (top right of page), then clicking **Reports** will display the Reports Library page.

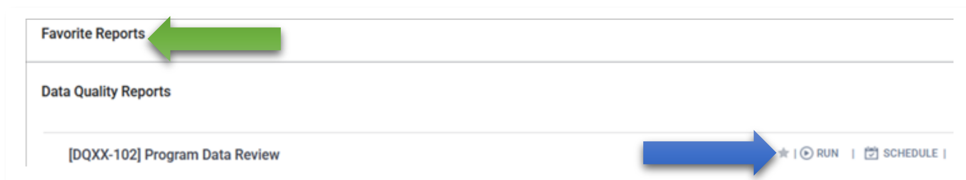
Select the folder to open. Example: clicking on **Data Quality Reports** will display up to 13 different reports.

The workflow for **Program Reports** is similar to Individual **Client Reports:**

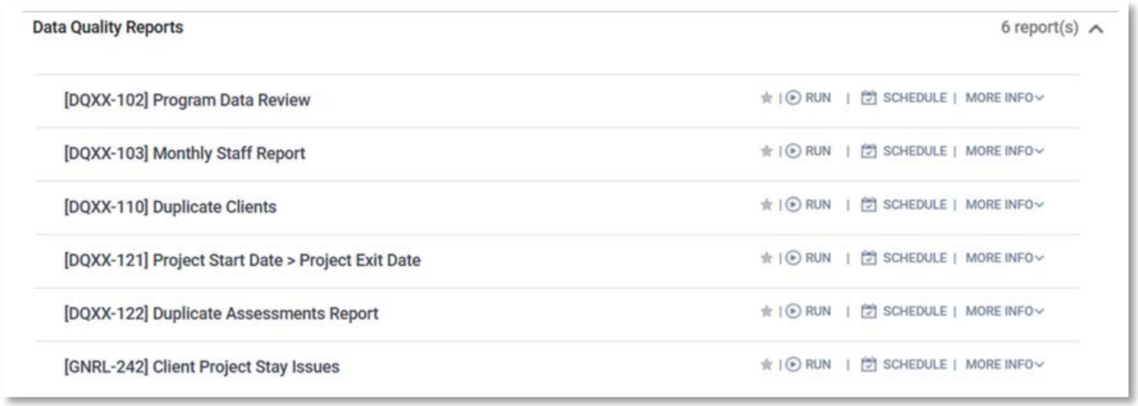
- Click **Run** to generate a report
- Click **Schedule** to run the report at a later date
- Click **More Info** for additional details



Program Reports has an additional feature. Beside each report is a star (blue arrow). Click on the star to add this report to your Favorite Reports folder (green arrow).



Data Quality Reports



[DQXX-102] Program Data Review

This report provides a list of client enrollments, their time in the program, and highlights data quality issues. Data is pulled from the enrollment and the exit. If there is a data quality error, the client will display in red.

[DQXX-103] Monthly Staff Report

This report provides 4 categories of data:

1. General data quality;
2. User activity (including the number of clients each staff member worked with);
3. Data quality by data element;
4. A list of staff from other agencies with “additional access” to the reporting agency.

[DQXX-110] Duplicate Clients

Identifies client records that have matching personal IDs.

[DQXX-121] Program Start Date>Project Exit Date

Lists any client whose Project Exit date is before the Project Start date.

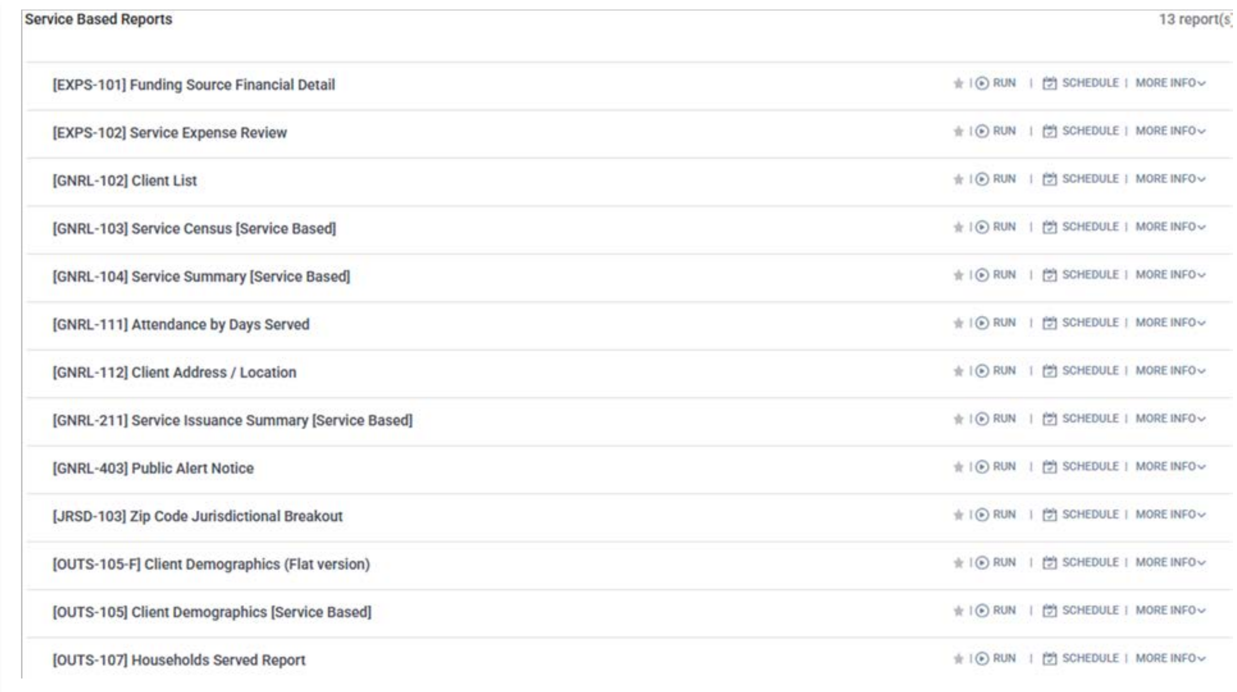
[DQXX-122] Duplicate Assessment Report

Lists any client with more than one of the same assessments.

[GNRL-242] Client Project Stay Issues

This report is used primarily to identify problems created during data integration.

Service Based Reports



[EXPS-101] Funding Source Financial Detail

Provides details of client service expenses based on an agency's funding sources, including a history of the service transactions per the specified date range.

[EXPS-102] Service Expense Review

Provides details on service transaction connected to selected funding sources.

[GNRL-102] Client List

Lists all clients, according to veteran status, who have received selected service item(s) per the specified date range.

[GNRL-103] Service Census (Service Based)

Lists clients who received specific services on specified dates during a chosen reporting timeframe. The drilldown functionality generates the names of client who received each service. A data quality score is also included, along with the staff member who entered the information.

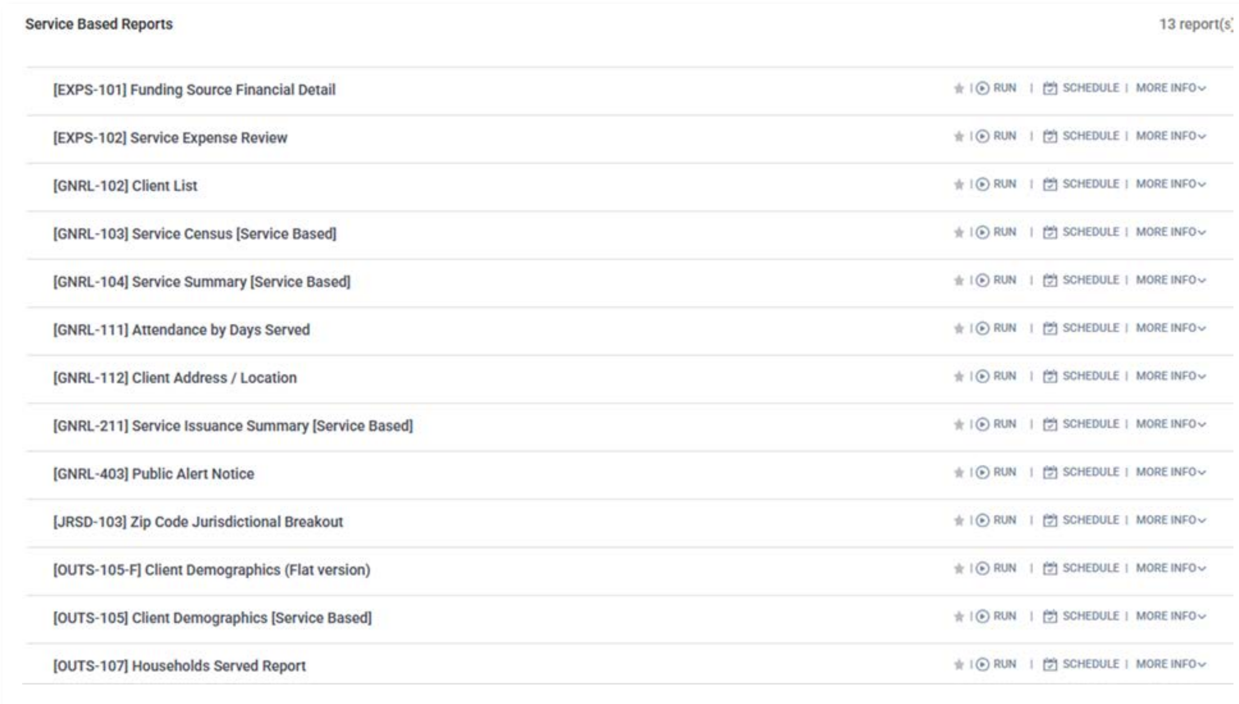
[GNRL-104] Service Summary (Service Based)

Provides service counts and the number of unique clients who received selected services per the specified date range.

[GNRL-111] Attendance by Days Served

Provides details on clients, according to housing status and veteran status, who have received selected service(s) per the specified date range.

Service Based Reports



[GNRL-112] Client Address/Location

Provides contact and location information for clients placed in specified service(s).

[GNRL-211] Service Issuance Summary (Service Based)

Provides a summary of service issuances for a chosen service during a specified period of time.

[GNRL-403) Public Alert Notice

Provides a list of alerts for clients that have an active service during the reporting period.

[JRSD-103] Zip Code Jurisdictional Breakout

Lists individuals and families attached to a service by zip code. This report may be useful for CDBG reporting. For the same report designed for programs, use **[JRSD-104] Zip Code** (located in the Program Based Reports folder).

[OUTS-105-F] Client Demographics (Flat version)

Provides client demographic details for selected services for a specified time period. This report provides the same information as **[OUTS-105] Client Demographics**, but charts, graphs, and figures are excluded from this report.

[OUTS-105] Client Demographics (Service Based)

Same as OUTS-105-F, but with charts, graphs, and figures. For the report that is designed to collect demographic for programs, use **[OUTS-106] Client Demographics** (located in the Program Reports folder).

[OUTS-107] Households Served Report

Provides an unduplicated count of persons served for specified services. It also provides total households served, including a list of all household members.

Program Based Reports

You may have access to up to 23 reports. A select number of Program Based Reports will be highlighted on this page.

[GNLR-106] Program Roster

Details clients who were active, enrolled, or exited during the specified date range. For the Status prompt:

- Select "Active Within Report Date Range" for clients who enrolled either prior or during the date range;
- Select "Enrolled Within Date Range" for a list of clients enrolled at any time during the date range;
- Select "Exited Within Date Range" for a list of clients exited during the date range.

[GNRL-241] New vs Re-Entry Client Program Classification

Provides an overview of program enrollments during the reporting period and evaluates whether a client or a household has been previously enrolled in the program.

[OUTS-101] Program Outcomes Measures

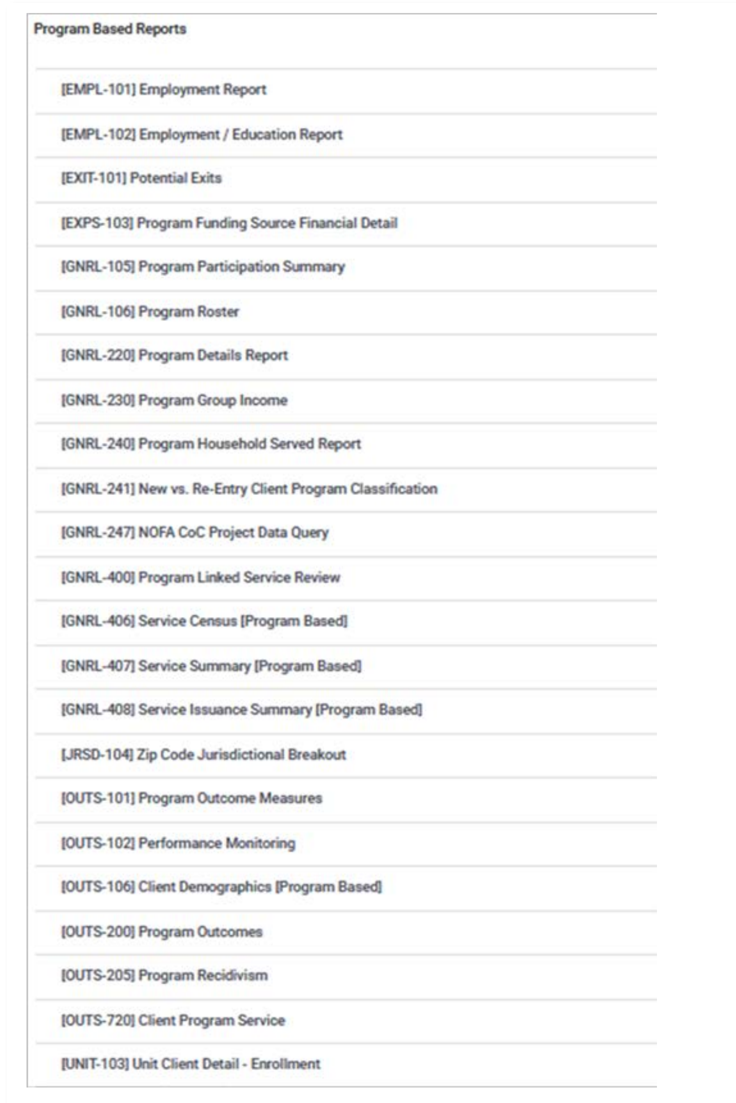
Provides basis exit destination and income outcomes in selected programs. Participation totals and unduplicated client counts, housing status of exited clients, along with efficiency/process measures are also included in the report.

[OUTS-106] Client Demographics (Program Based)

Provides client demographics details for selected programs per the specified date range.

[OUTS-200] Program Outcomes

Provides client cash and non-cash benefits at the time of exit. It also reports housing outcomes for Transitional Housing & Permanent Housing programs.



Program Based Reports

- [EMPL-101] Employment Report
- [EMPL-102] Employment / Education Report
- [EXIT-101] Potential Exits
- [EXPS-103] Program Funding Source Financial Detail
- [GNRL-105] Program Participation Summary
- [GNRL-106] Program Roster
- [GNRL-220] Program Details Report
- [GNRL-230] Program Group Income
- [GNRL-240] Program Household Served Report
- [GNRL-241] New vs. Re-Entry Client Program Classification
- [GNRL-247] NOFA CoC Project Data Query
- [GNRL-400] Program Linked Service Review
- [GNRL-406] Service Census [Program Based]
- [GNRL-407] Service Summary [Program Based]
- [GNRL-408] Service Issuance Summary [Program Based]
- [JRSD-104] Zip Code Jurisdictional Breakout
- [OUTS-101] Program Outcome Measures
- [OUTS-102] Performance Monitoring
- [OUTS-106] Client Demographics [Program Based]
- [OUTS-200] Program Outcomes
- [OUTS-205] Program Recidivism
- [OUTS-720] Client Program Service
- [UNIT-103] Unit Client Detail - Enrollment

Assessment Based Reports

[GNRL-210] Assessment Details Report
Lists all the responses for each client to the questions on the selected assessment.

[GNRL-404] CE Assessment Details Report
The Assessment Details report is similar to the **[GNRL-401] VI-SPDAT Details** report (located in the Community & Referrals folder). The main difference is it widens out the assessment choices to all assessments designated for coordinated entry, not just the VI-SPDAT. This version reports subtotals of the assessment processors, not the details about each assessment field.

[GNRL-405] CE Assessing Staff Report
The CE Assessing Staff Report details assessments* created during the reporting period, separated by the assessing staff person. It is intended for use by assessing staff and program management.

[OUTS-108] CE Demographics Report
Provides a way for communities to understand the demographics of the people served by the coordinated entry system.

Profile Screen Report

[GNRL-212] Profile Details Report
The Profile Details report lists all the responses to the questions on the selected profile screen. The responses for each client are included. This report requires either an enrollment, assessment, or service during the specified date range.

Housing

[HSNG-102] CoC Housing Assessment Report

This report uses Bed Inventories and Program Enrollments to report on bed availability and utilization, providing a monthly housing attendance average for each month of the reporting period for all CoC participating agencies. The four PIT (Point-in-time) dates (last Wednesday of the designated month) are also provided to assist in the assessment of individual housing programs included in the HIC (Housing Inventory Count) and the LSA (Longitudinal System Analysis).

[HSNG-104] Monthly Housing Report

This enrollment-based report is intended to serve as a complete single-month review of housing programs.

[HSNG-105] Weekly Housing Census

This is an enrollment-based report intended to serve as a 7-day review of housing programs.

[HSNG-108] Housing Census

This is an entry/exit-based report for housing programs.

- For Emergency Shelter – Night-by-Night projects, bed nights are also used in generating the report.
- For Permanent Housing programs, Housing Move-in Date is also considered.
- The report gives users a day-by-day account of the bed occupancy during the reporting period. This is broken out into separate tables by programs selected.

[HSNG-200] Current Housing Availability

This report summarizes (by housing project type, then program name) the amount of available bed and unit inventory on the night before the report is run.

HUD Reports

[HUDX-111] HUD/CSV XML Program Data Report (FY 2024)
This report is used for exporting data from the Clarity system according to HMIS CSV/XML Format Specifications.

[HUDX-224] PATH Annual Report (FY 2024)
Annual PATH report for HHS. This report is a program and service-based report that provides details of all clients according to PATH Reporting specifications.

[HUDX-225] HMIS Data Quality Report (FY 2024)
Details on quality issues. Note: SSNs with only the last 4 digits, or client does not know or prefers not to answer … all these responses will be cited as a data quality issue. If the data entered in HMIS is correct, then this is not a data quality issue.

[HUDX-227] Annual Performance Report (FY 2024)
Recipients of HUD Continuum of Care (CoC) funding (e.g., Supportive Housing Program, Shelter Plus Care, Section 8 Moderate Rehabilitation Single Room Occupancy Program, CoC Program) are required to submit an Annual Performance Report (APR) electronically to HUD every operating year.

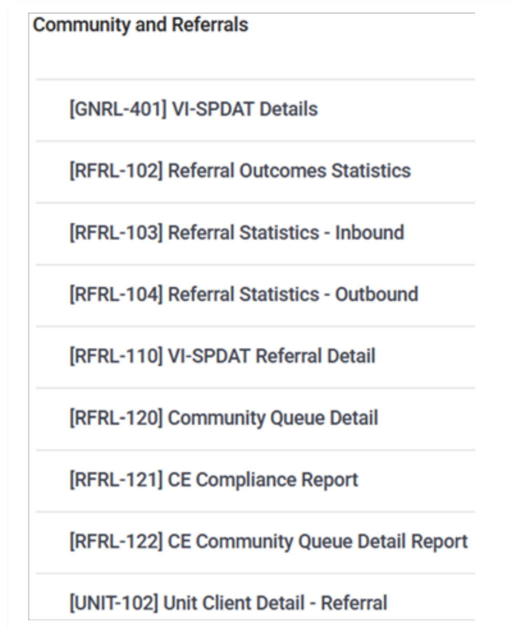
[HUDX-228] ESG CAPER (FY 2024)
Similar to the APR, but without the tables not required for the ESG-CAPER.

[HUDX-231] LSA Export-Project Focused LSA (FY 2024)
This is a project-based version that can be used by agencies to check their data.

[HUDX-235] CE APR (FY 2024)
The CE APR is a series of tables with questions about service levels and outcomes for the funded projects. However, this report will include all projects where elements 4.19 Coordinated Entry Assessment and 4.20 Coordinated Entry Event are completed.

[HUDX-236] Project Descriptor HDX Upload Test (FY 2024)
This report can be used to prepare for HDX upload without running client data. The purpose is to identify project descriptor issues.

Community and Referral



[GNRL-401] VI-SPDAT Details
The VI-SPDAT Details report returns a list of clients assessed during the reporting period and VI-SPDAT score details.

[RFRL-102] Referral Outcomes Statistics
The Referral Outcome Statistics report returns a detailed breakdown of referral outcomes by agency and program during the reporting period.

[RFRL-103] Referral Statistics-Inbound
Details Inbound referrals that are Pending, Pending-In Process, Denied, Expired, Completed, or the status was changed to Pending or Pending - In Process before the report start date and did not change status during the reporting period.

[RFRL-104] Referral Statistics-Outbound
Same as previous report, except looking at Outbound referrals.

[RFRL-110] VI-SPDAT Referral Details
The VI-SPDAT Referral Detail report is based on referrals that were created during the Report Date Range. The report is broken down by referral types (Community Queue, Agency Referrals).

[RFRL-120] Community Queue Detail
Clients from the Community Queues are divided into groups:
- Clients who are between the ages of 18-24
- Clients who are veterans
- Clients with income
- Clients who have been in jail or prison
- Clients who reported having no insurance

[RFRL-121] CE Compliance Report
Details demographic details of clients on the community queue.

[RFRL-122] CE Community Queue Detail Report
Provide details about clients on coordinated entry queues.

[UNIT-102] Unit Client Detail-Referral
Provides details on referred clients who were assigned to a Unit.

Agency Management

[STFF-101] User Activity Report
Provides information regarding login dates, times, and durations.

[STFF-103] User Active Caseload
Details of the current caseload for a user and the activities. A staff is considered assigned to an enrollment if they created the enrollment or were assigned to the enrollment.

[STFF-104] Staff Client Data Activity Report
This report assists in providing program management/review with a record of Staff/User client record activity.

[STFF-106] User Client Note Hours Tracked
Provides an overview of the client note hours that were tracked by users. The hours also include a drilldown to details about the clients and notes tracked.