Developed By:
Haven for Hope

HMIS User Training Guide
Basic Functions V 5.2

San Antonio/Bexar County

1 Haven for Hope
San Antonio, TX. 78207

Help Desk:
https://portal.havenforhope.org/Servicerequest/Submitsr.aspx

Introduction

The Homeless Management Information System (HMIS) is used to collect client-level information, which can be shared across agencies that serve the homeless population. This guide will take a step-by-step approach by going through each basic function in HMIS. The data elements in HMIS are dictated by the HUD HMIS Data Standards. More detailed instructions on data input and requirements can be found on the HUD Data Exchange or the HMIS Resources page.

You may notice some differences in the functions you see in your HMIS role, and the role used to complete this guide. You can check what role you are listed under by looking in the top right corner of the screen. In this example, Steve's role is "H4H Staff". He will see some functionality that is specific to Haven for Hope that is not covered in this training guide.

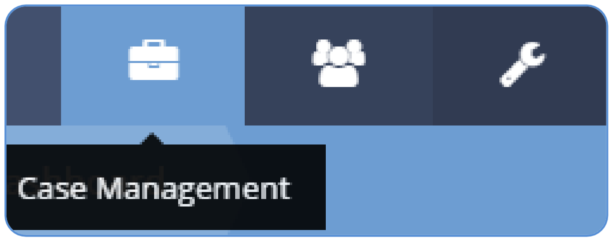
You can check what role you are listed under by looking here:

This guide will use screenshots from the "HMIS" role. The training manual will be separated into three separate "Tabs," which can accessed at the top of the screen:

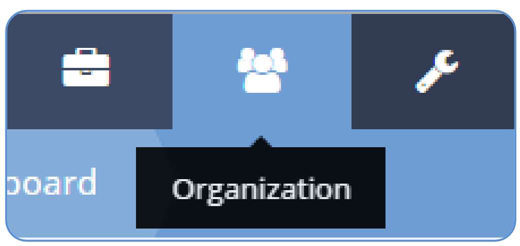
This icon expands the screen, and brings back the navigation pane:

The three separate "Tabs" that will be covered in this training manual are:

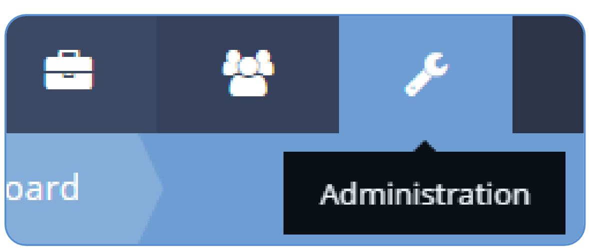
The Case Management tab includes all tasks a user would need to record data about an individual client. For example, creating a new client, enrolling a client in a project or adding services, and completing assessments.



The Organization tab includes all functions a user would need to complete for a group of clients. For example, checking clients into beds, adding services to multiple users at once, or accepting a list of referrals.



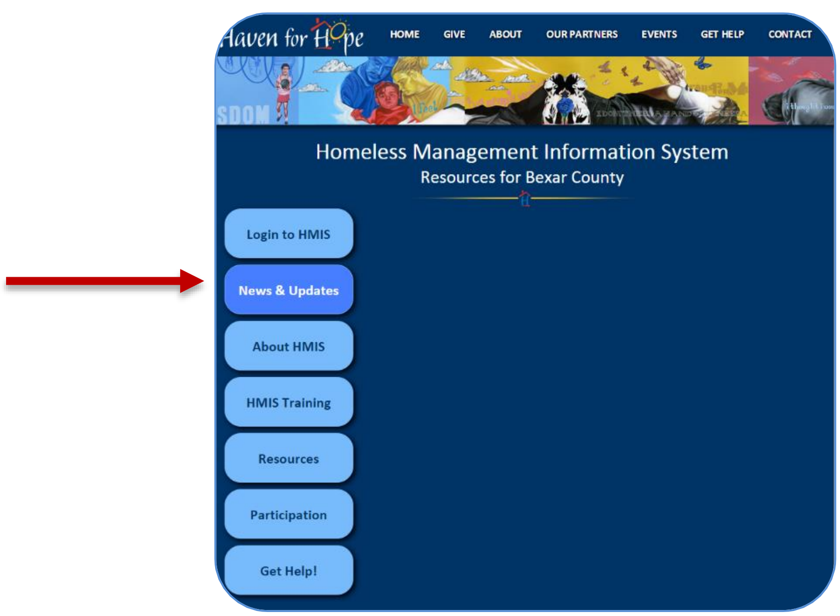
The Administration tab includes all HMIS reports, as well as CSV and XML export functions.



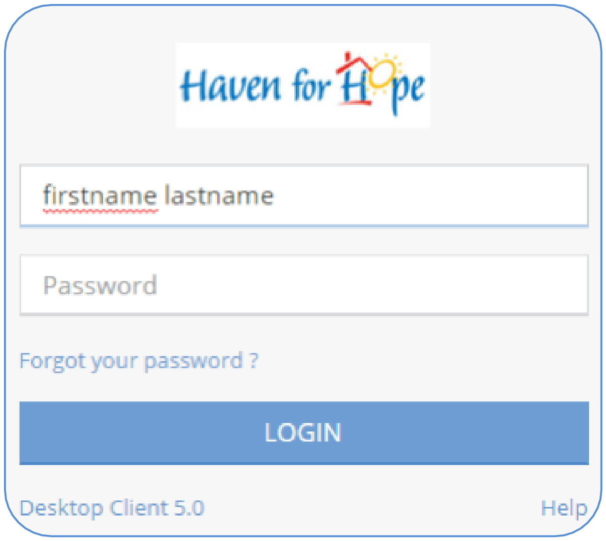
Logging into HMIS

To log in, open **Google Chrome**, go to the Haven for Hope website (http://www.havenforhope.org), scroll to the bottom of the screen, and click on the envelope called **"HMIS"**:

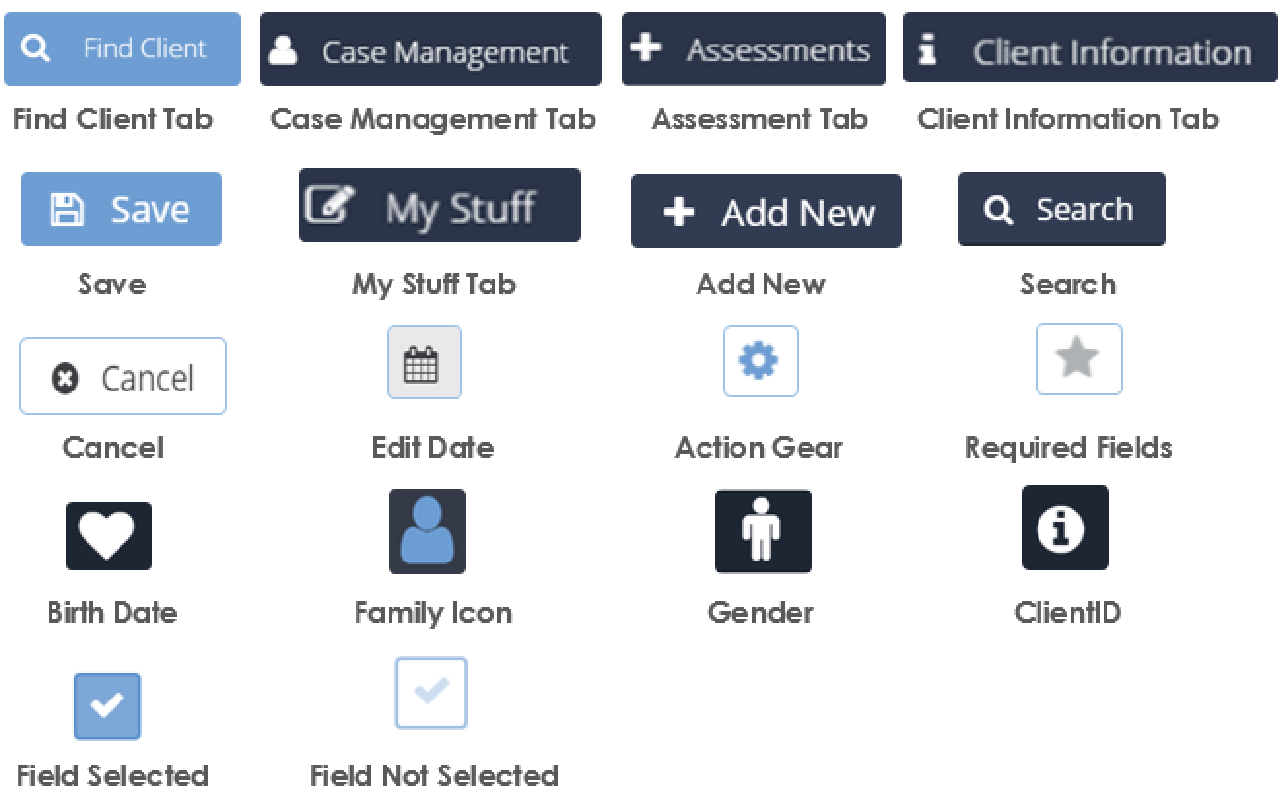
Then, click the link located on the left hand side called "**Login to HMIS**".



Once in the login page, type in your user name and case sensitive password, and click ***Login***.



Navigation Icons for HMIS



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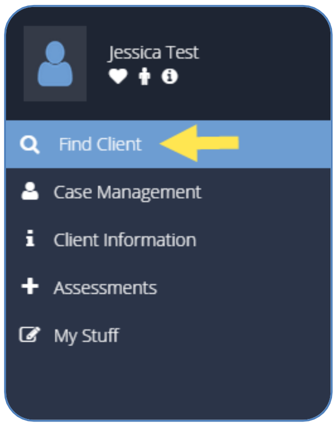
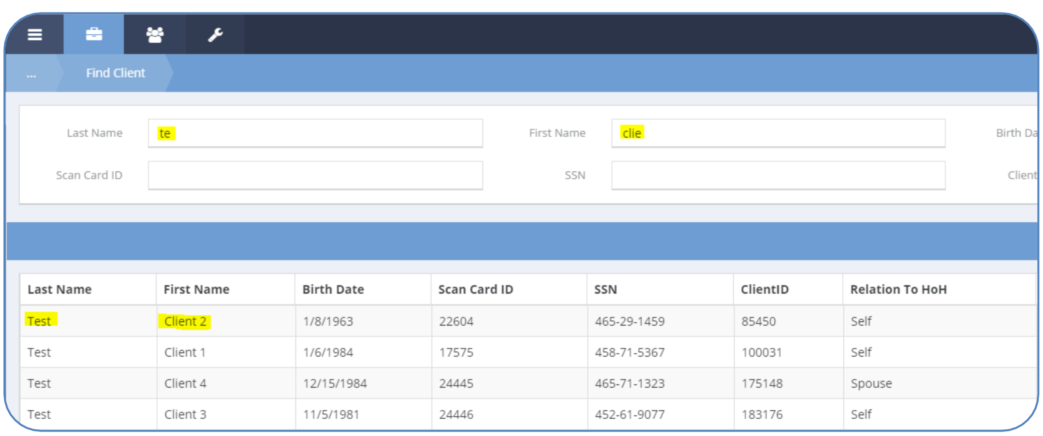
Case Management Workspace

Finding a Client

To find a new client with HMIS, click the "Find Client" button on the top of the screen.



On the search screen, you will be able to find a client based on name, date of birth, and/or social security number. You can also search by scan card ID (if applicable) and their unique HMIS client ID if known. The name fields are sensitive enough that you may type in their name partially and still search based on the information you enter. Here is an example of a client search based on the name "Client 1 Test." As you can see, the name is only entered partially.



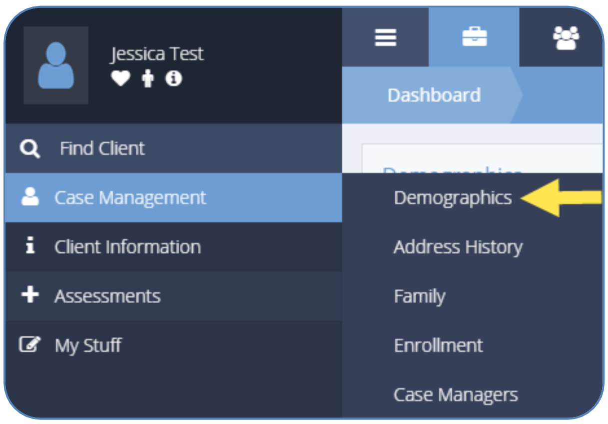
Once you have found the client you are searching for, simply click on that client's name and HMIS will pull up that file.

Case Management Tab

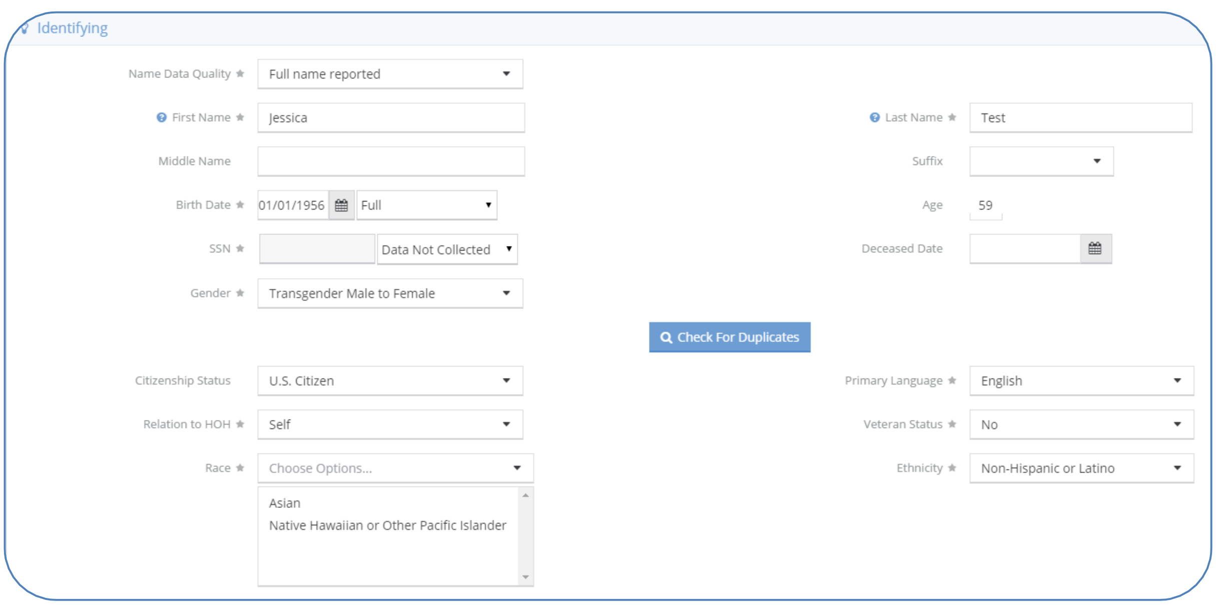
Demographics

This section includes all demographic information on the client. The required fields for this section (and all others) are shown with a grey star next to the field.

The Demographics section can be accessed by clicking on the Case Management Tab.

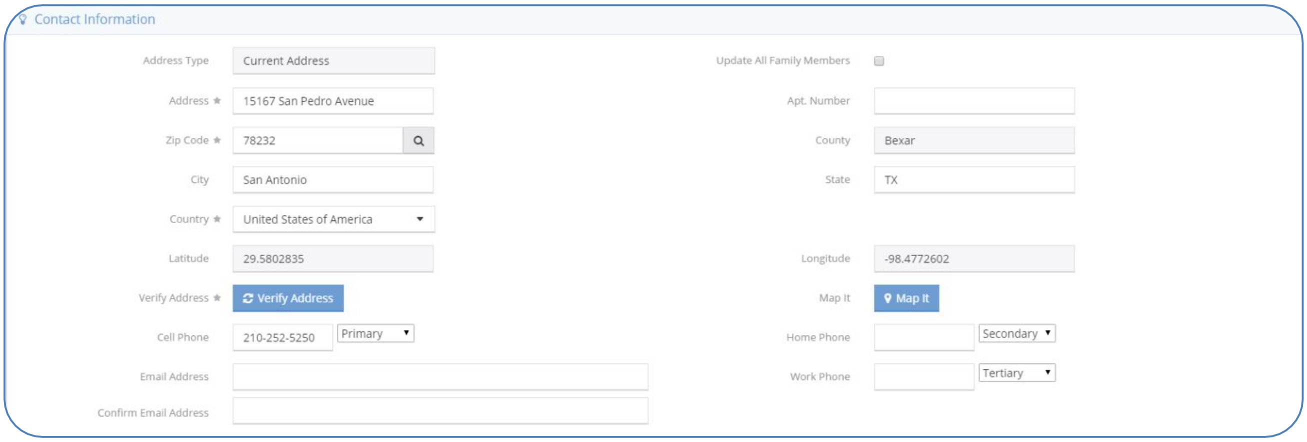


Once the Demographic section has been clicked, you will see a screen which looks like this:



The first section of the Demographics page is Identifying information. You can edit or update certain demographics within this screen.

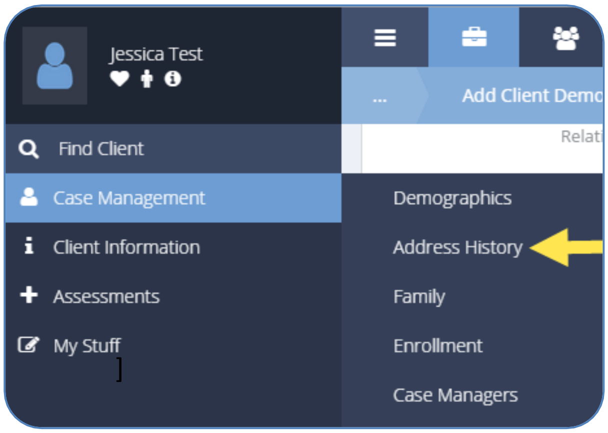
The bottom section of the Demographics page is Contact Information:



Keep in mind there is an Address History section within HMIS, so if the client's address changed, you should edit that field there. If editing is required, click the "Save" button located on the bottom right-hand side of the screen.

Address History

This section can be accessed here, under the Case Management section:



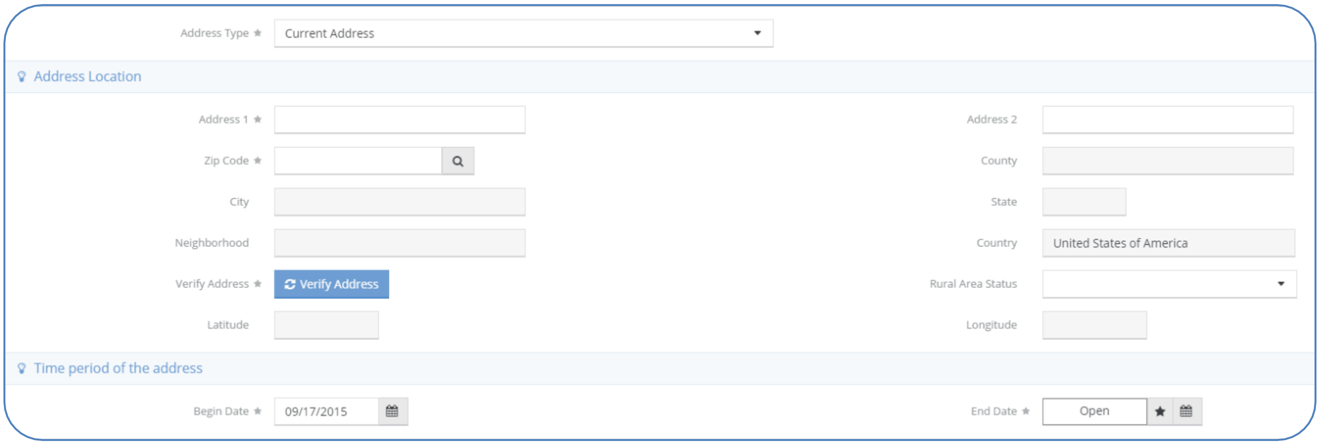
This section is where you can view/add all known addresses for the client. Use this section to add/edit all addresses. Changing information in the demographic section will overwrite information in the Address History section.

Once you have clicked on the Address History section, your screen will look similar to this:

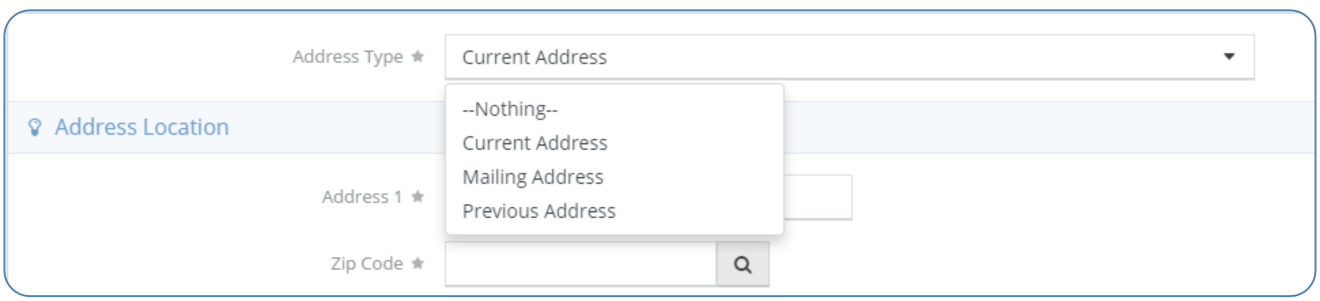
Type	Address	Begin - End Date
Current Address	15167 San Pedro Avenue, , San Antonio, TX, 78232	8/25/2015 - Present
Previous Address	1 Haven for Hope Way, , SAN ANTONIO, Te, 78205	8/18/2015 - 8/18/2015

To add a new address, click the "Add New" button on the top right corner of the page.

After you have clicked the button, the screen should look like this:



Under the "Address Type" field, you will be able to choose between Current Address, Mailing Address, and Previous Address. If you choose "Current Address," this will be the address that shows on the "Demographics" section.



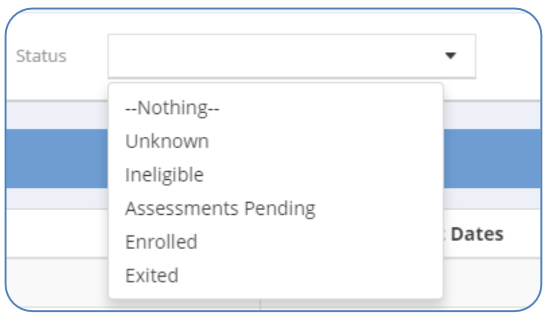
When you have finished entering the client's information, click the "Save" button located on the bottom right-hand side of the screen.

Enrollment

This section is where you can view/edit all enrollments in projects that the client is tied to. **Your screen should look similar to this once you've entered the section:**

	Status	Project	Project Entry - Exit Dates	Enrolled (Current)	Enrolled (Ever)
	Enrolled	H4H Employment Readiness Computer Lab	9/1/2015 - Present	1	1
	Enrolled	AGIF NVOP RC TH	5/1/2015 - Present	1	1

On the left-hand side of the screen (picture above), you can see the status of the enrollment. This will let you know if the client is currently enrolled in the project or if they have been exited. You can filter the list of enrollments to only those where they are currently enrolled, only exited enrollments, or only enrollments with assessments pending by clicking on "Status" in the top, center of the screen.



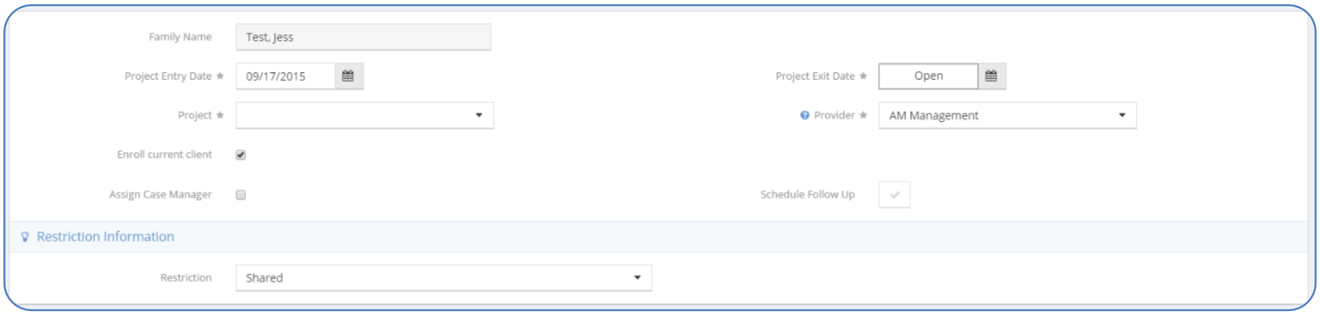
The next column on the enrollment screen is the name of the project, followed by the begin/end dates for that project.

All the way on the right-hand side of the enrollment page shows the number of members enrolled into the project from that client's family. There is a column for Enrolled (Current): which displays every member currently enrolled, and Enrolled (Ever): which displays the maximum amount of family members that were ever in that project. In this example, Jessica Test is currently enrolled, and is the only person that has ever been part of the enrollment in these projects.

	Status	Project	Project Entry - Exit Dates	Enrolled (Current)	Enrolled (Ever)	EnrollmentID
	Enrolled	H4H Employment Readiness Computer Lab	9/1/2015 - Present	1	1	235383
	Enrolled	AGIF NVOP RC TH	5/1/2015 - Present	1	1	235232

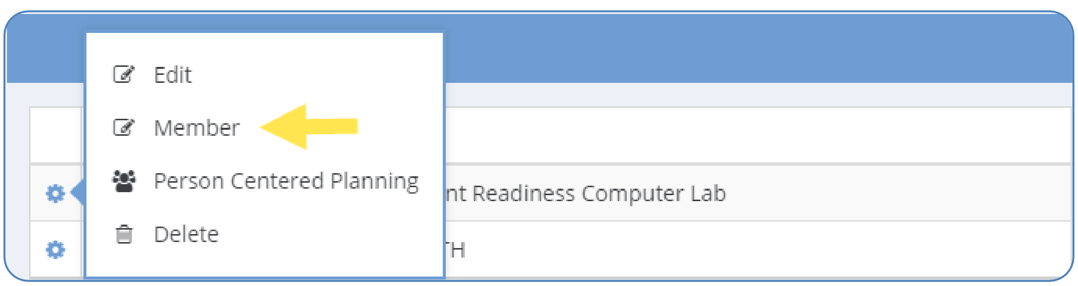
To edit the enrollment or view the members of the family who are also enrolled in that project, click on the action gear and "Member".

To add a new enrollment into a project, click on the "Add New" button located on the upper right-hand side of the screen. **A new screen should appear looking like this:**



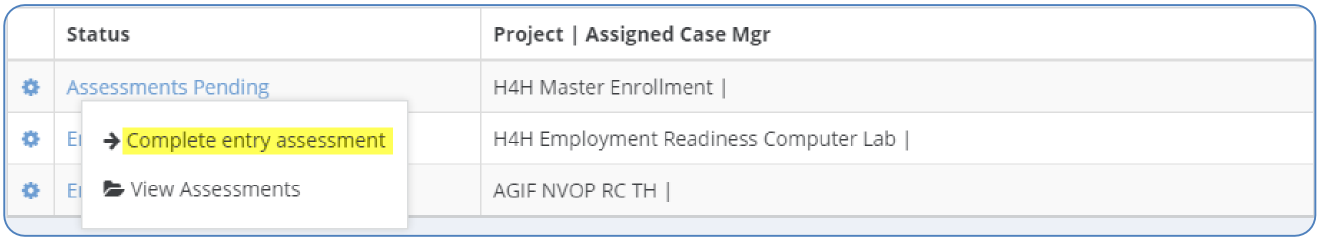
You will need to select the project you would like to enroll the client in and the provider of that project. When you have finished, click Save on the bottom right-hand corner of your screen.

Once you are finished, HMIS will take you back to the enrollment screen. You will now be able to see the enrollment you just added for that client. If you need to enroll family members into the project along with the client you are viewing, select the action gear next to the new enrollment and select "Member."



Once you have reached the next screen, select the "Add/Edit Members" button on the upper right-hand side of the screen. To add a family member to this enrollment, select the clear circle next to their name and click the "Save" button on the lower right-hand side of the screen.

After you have done the previous steps, go back to the enrollment page, and if the status of the enrollment says "Assessments Pending," you will still have one more step in the process. Click on the link that says "Assessments Pending" and select "Complete Entry Assessment."

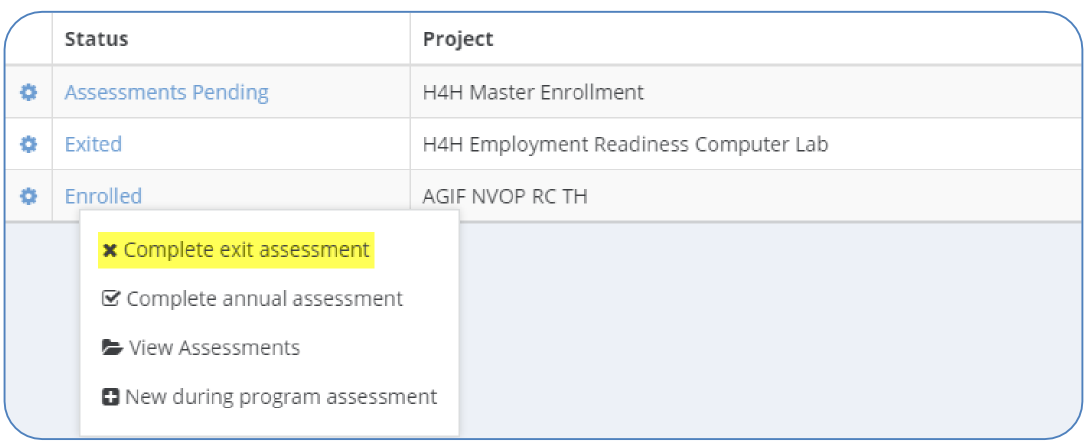


After you have done that, you will enter into a "Workflow," which will take you step by step through each assessment. If the client you are viewing has family members attached to the enrollment with him/her, you will also be walked through the assessments for those individual family members.

The status of the enrollment will show "enrolled" instead of "assessments pending" when you have completed the workflow.

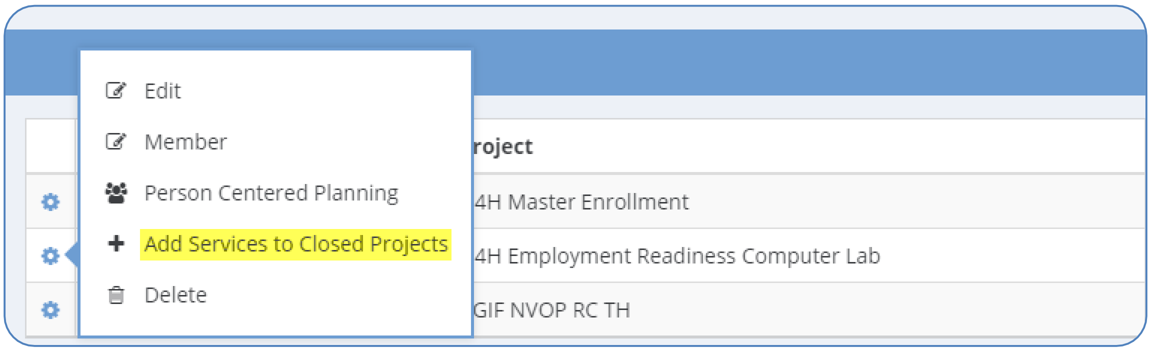
<u>IMPORTANT:</u> Assessments require an open enrollment to be added for a client. You will not be able to add assessments to a client with a status of "exited" without re-opening that client's enrollment.

To end an already existing enrollment, select the link for the enrollment status and select "Complete Exit Assessment."



Once you have completed the workflow, the end date of the enrollment will change to the date you completed their assessments. The status will also change to "Exited."

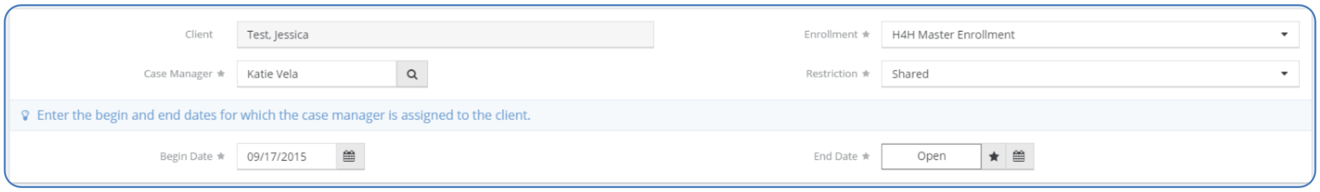
You can add services to an exited enrollment by clicking on the **Action Gear** of an enrollment with a Status of "Exited".



Case Managers

This section is used to view/add a Case Manager to the client.

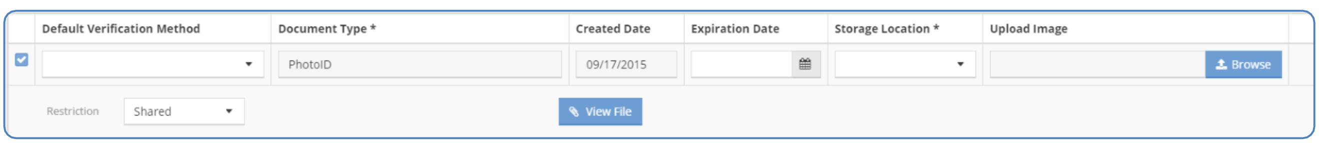
Once you have entered into the "Case Managers" section, to add a new Case Manager, click the "Add New" button located on the upper right-hand side of your screen. A new form will appear where you will be able to select an enrollment for the Case Manager, and look up the client and Case Manager's names.



Documents

This section can be used to make note of a document obtained from the client.

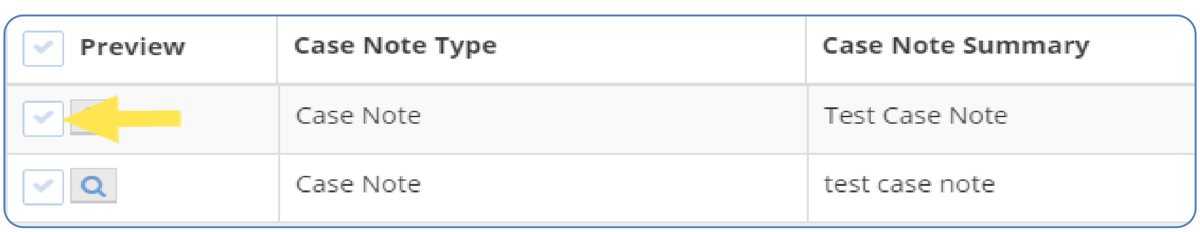
To add a new document to that client's information, click the "Documents" button located on the left-hand side of the screen. The picture below shows the options you have to choose from when making note of a document. If you choose to upload an image related to this document, the information you enter will also be viewable in the Files section (mentioned later) when you have finished entering all information, click the Save button located on the bottom right-hand side of the screen.



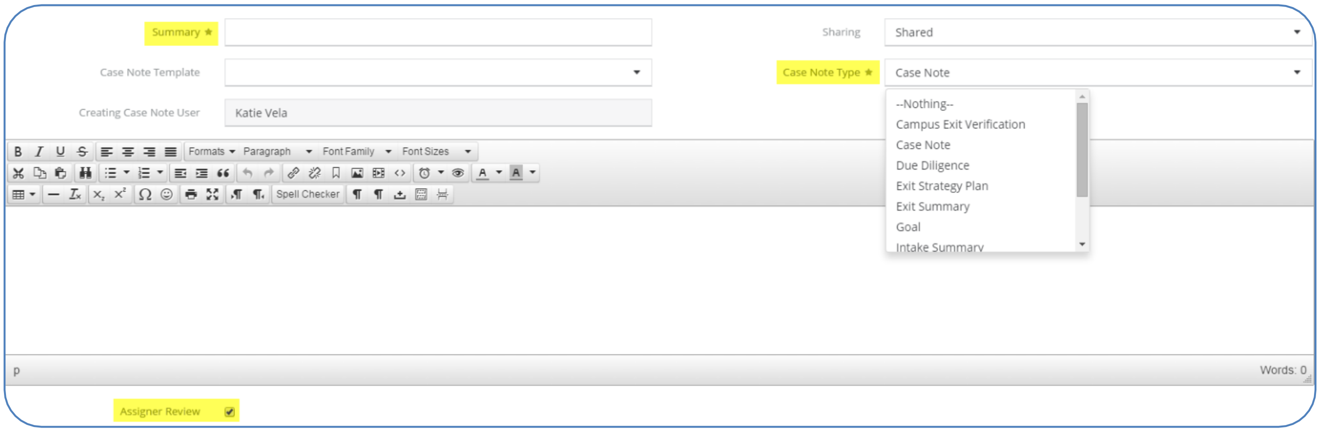
Case Notes

In this section, you have the ability to view and add case notes about the client you are viewing. This is a great place to enter any helpful information about the client that isn't previously recorded in the assessments you have to fill out about them.

To view a case note that already exists, click on the magnifying glass next to the "Case Note Type."



To add a new case note to HMIS, click the "Add New" button on the upper right-hand corner of the page. Title the case note and enter in a description of the case note in the box below. To assign a reviewer to the case note, check the box next to "Assigner Review" and search for a user you would like to view the case note. Make sure you select a "Case Note Type" when entering a case note. When you have finished, click "Save" on the bottom right-hand corner of the screen.



Services

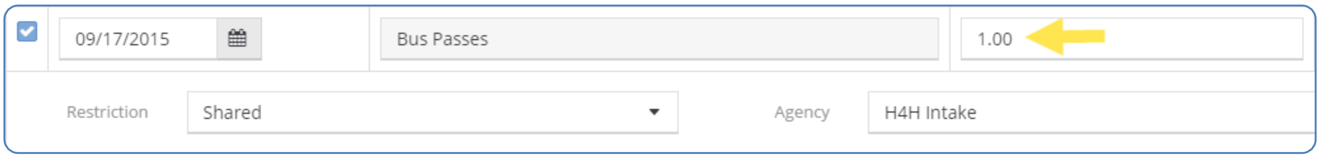
In this section, you will be able to see what services (if any) the client has received and from which project the service was received.

To add a service to your client, click the "Add New" button on the upper right-hand corner of the page. From there you will select the "Project" (another name for the service provider) from the drop-down menu and click search.

All of the services provided by that project will be shown, similar to this:

	Begin Date	Service	Units *	Unit Value
☑		Access To Fax Machine	0.00	1.00
☑		Acquire GED	0.00	1,000.00
☑		Activities- Educational	0.00	1.00
☑		Activities- Enrichment	0.00	1.00
☑		Activities- Recreational	0.00	1.00

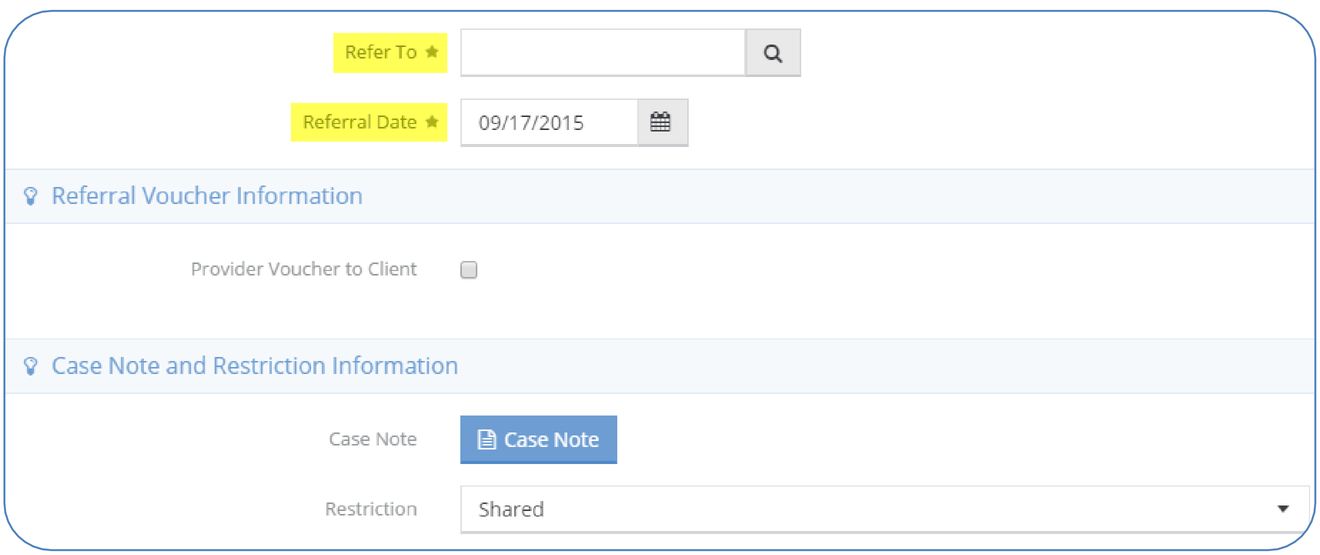
To add a service, click on the check box to the left of the service date. You will need to select the "Units" they received. The example below shows that the client has received a service (Bus Passes) and the units are 1, since they received one Bus Pass. When you are finished, click the "Save" button located on the lower right-hand corner of the page.



Referrals

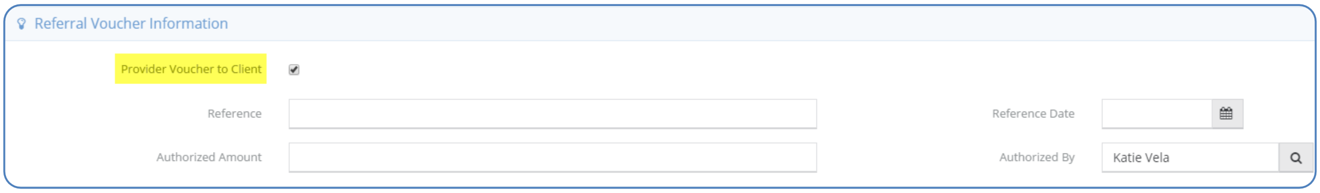
In this section, you have the ability to refer a client to another provider. To add a new referral, click the "Add New" button on the upper right-hand side of the screen.

A new screen will appear as follows:



You may click the magnifying glass next to "Refer To" and select the provider and service name you are referring the client to.

If you would like to include a voucher with the referral, check the box labeled "Provide Voucher to Client," and the following screen will appear:



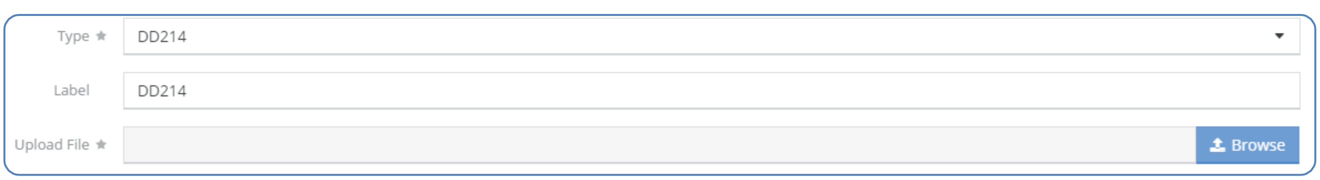
Enter in a Reference Number, the dollar amount of the voucher, and reference date. When you have finished editing the referral, click "Save" on the bottom right-hand corner of the screen.

Instructions on how to check your own referrals from other providers will be discussed in the "Organization Tab."

Files

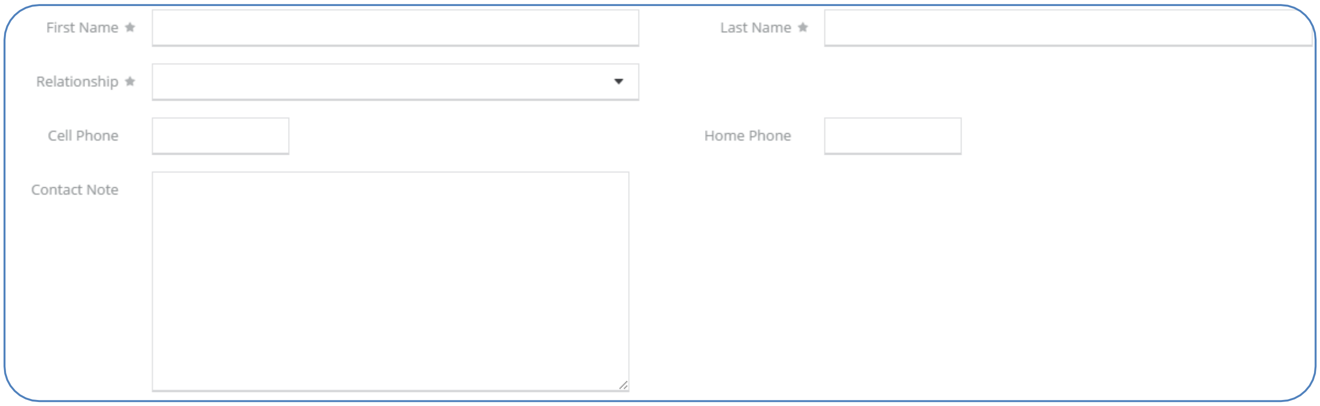
In this section, you have the ability to actually attach a document from your computer to a client's file in HMIS. This section can be found under the "Documents and Files" section of the Case Management tab.

To add a new file for the client, click the "View Files" button located on the right-hand side of the screen, "Add New", fill out the information in each field, and click "Save" when you are finished entering the required data.



Contacts

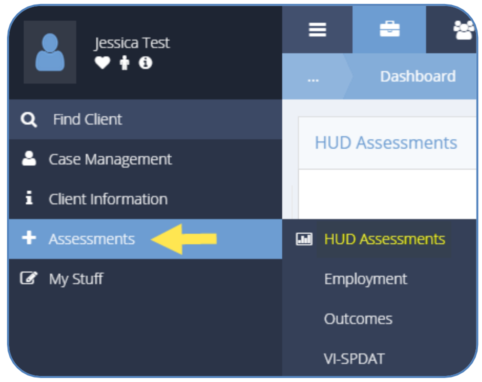
In this section you can add contacts that may be important for case management. Some examples may be emergency contacts, doctors, friends, etc. To add a new contact in your client's file, click the "Add New" button located on the upper right-hand side of the screen and fill out the information required on the form. When you have finished, click the "Save" button located on the bottom right-hand side of the screen

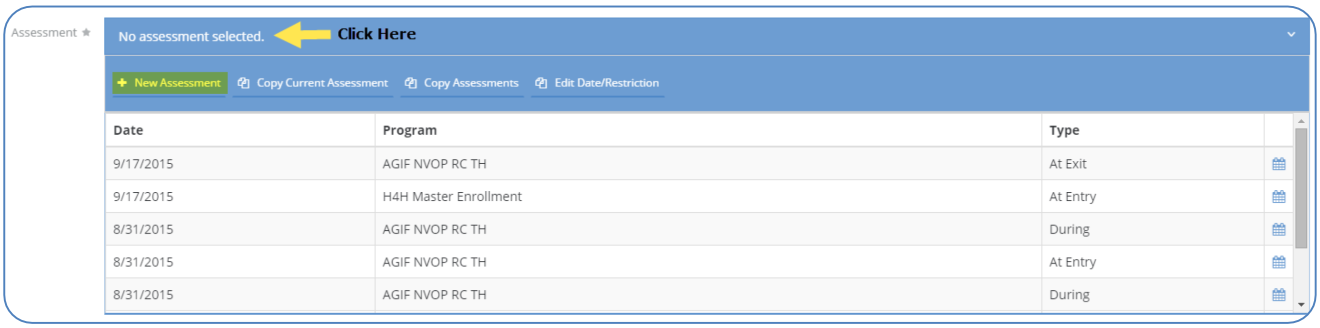


Assessments Tab

HUD Universal Assessment

To fill in this assessment, select "HUD Universal" from the Assessments pane. Click the "Add New" button located on the upper right-hand side of the screen and select the correct assessment from the blue box.





If you do not see your assessment listed in the drop-down menu (picture above), then you have the option to click the "New Assessment" button and enter in the correct assessment to be filled out.

Fill in all required fields and click the "Save" button located on the bottom right-hand side of the screen when you have finished.

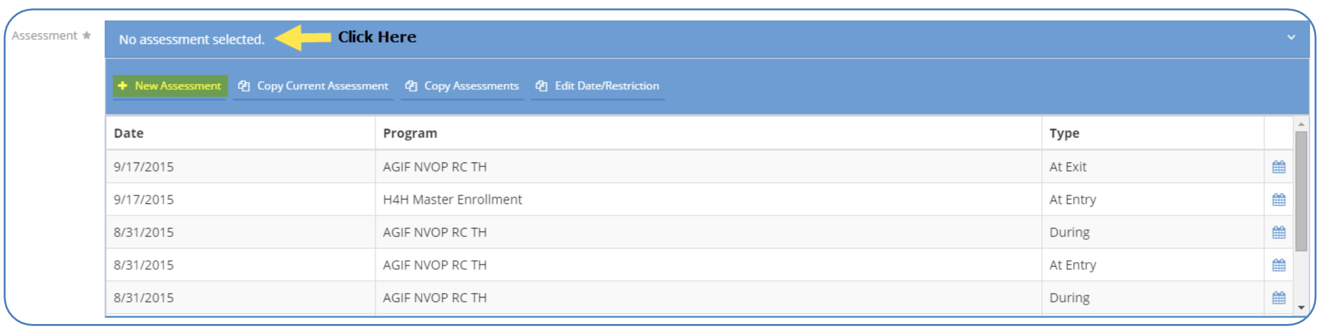
IMPORTANT: The HUD Universal Assessment is required for all HMIS projects because it contains HUD Universal Data Elements. Please review the 2015 HUD HMIS Data Standards for detailed descriptions of each HUD Universal Data Element. A copy is available on the HMIS Resources page.

Universal Data Elements (UDEs) Include:

- **Name** - Demographics
- **Social Security Number** - Demographics
- **Date of Birth** - Demographics
- **Race** - Demographics
- **Ethnicity** - Demographics
- **Gender** - Demographics
- **Veteran Status** - Demographics
- **Disabling Condition** – HUD Universal Assessment
- **Residence Prior to Project Entry** – HUD Universal Assessment
- **Length of Time on Street, in ES, or SH** – HUD Universal Assessment
- **Client Location** – HUD Universal Assessment
- **Project Entry and Exit Date** - Enrollment
- **Relationship to Head of Household** - Enrollment
- **Exit Destination** – HUD Program Assessment

HUD Program Assessment

To fill in this assessment, select "HUD Program" from the Assessments pane. Click the "Add New" button located on the upper right-hand side of the screen and select the correct assessment from the blue box.



Fill in all required fields and click the "Save" button located on the bottom right-hand side of the screen when you have finished.

<u>IMPORTANT:</u> The HUD Program Assessment contains one HUD Universal Data Element that is required for all HMIS Projects – Exit Destination. This question is only completed at client exit.

Program Specific Data Elements differ from the Universal Data Elements in that no one project must collect every single element in this section. Required data elements are dictated by the reporting requirements set forth by each Federal partner for each of the projects they fund.

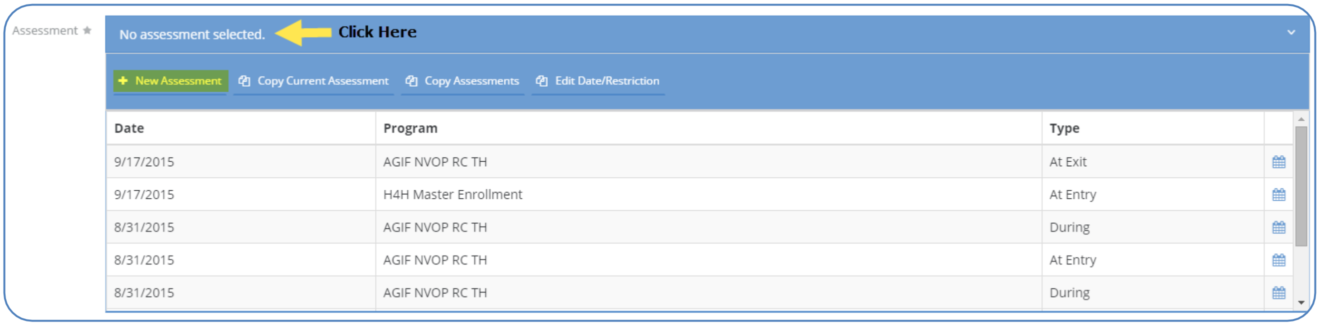
A Partner may require all of the fields or response categories or may specify which of the fields or response categories are required for their reporting needs.

The Program Specific Data Elements (PDEs) Include:

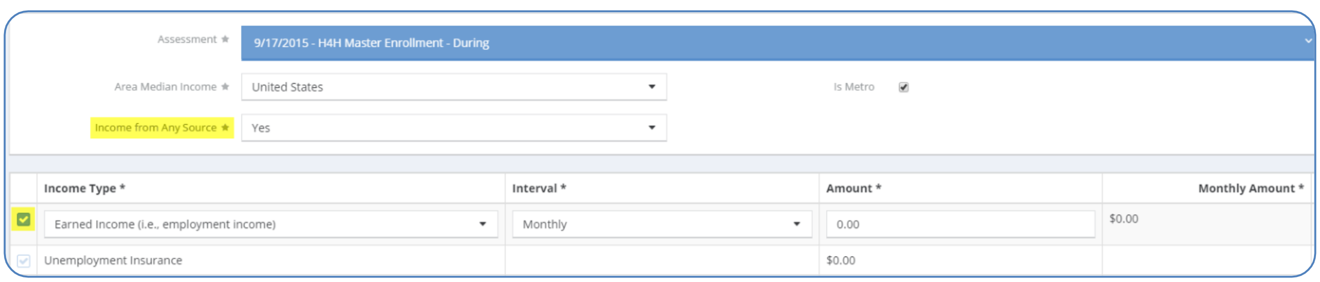
- Housing Status – **HUD Program Assessment**
- Income and Sources – **HUD Financial Assessment**
- Non-Cash Benefits – **HUD Program Assessment**
- Health Insurance – **HUD Health Insurance Assessment**
- Physical Disability – **HUD Program Assessment**
- Developmental Disability – **HUD Program Assessment**
- Chronic Health Condition – **HUD Program Assessment**
- HIV/AIDS – **HUD Program Assessment**
- Mental Health – **HUD Program Assessment**
- Substance Abuse – **HUD Program Assessment**
- Domestic Violence – **HUD Program Assessment**
- Contact – **Services** (Outreach/PATH Only)
- Date of Engagement - **Services** (Outreach/PATH Only)
- Services Provided – **Services** (RHY/PATH/HOPWA/SSVF Only)
- Financial Assistance Provided – **Services** (HOPWA/SSVF Only)
- Referrals Provided – **Services** (PATH/RHY Only)
- Residential Move-In Date – **HUD Program Assessment** (RRH/SSVF Only)
- Housing Assessment Disposition – **HUD Program Assessment**
- Housing Assessment at Exit – **HUD Program Assessment**

Financial Assessment

To fill in this assessment, select "Financial Assessment" from the Assessments pane. Click the "Add New" button located on the upper right-hand side of the screen and select the correct assessment from the blue box.

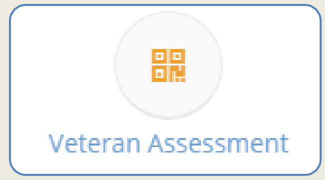


Click the check box next to the correct "Income Type" to add a new line of financial information. If the client has no financial resources, you will need to change "Income from Any Source" from "yes" to "no". "Area Median Income" (at the top of the screen) is not a required data element – so feel free to submit a ticket and request it be removed from your assessment questions.



Fill in all required fields and click the "Save" button located on the bottom right-hand side of the screen when you have finished. Anytime there is a change in the client's financial resources, you should add a "during program" Financial Assessment with updated information. **This data is required for HUD-funded projects.**

Veteran Assessment

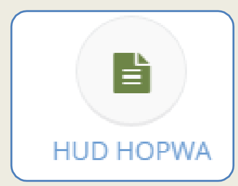


<u>IMPORTANT:</u> This data is only required for VA-funded HMIS Projects. Use the "copy assessment" feature for this assessment so the data is consistent across projects. The latest veteran assessment is used for the VA repository upload. The assessment only populates in a workflow if the client is marked as a veteran on their demographics page at client record creation.

HUD Health Insurance

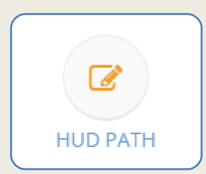
<u>IMPORTANT:</u> This assessment will only populate in a workflow if "yes" is selected for Health Insurance on the HUD Program Assessment.

HUD HOPWA



<u>IMPORTANT:</u> This assessment contains one new question as of October 1st, 2015: Viral Load Information Available. If Yes – Viral Load Count and How was the Viral Load Information Obtained.

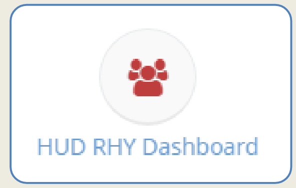
HUD PATH



<u>IMPORTANT:</u> This assessment indicates when the client became enrolled in PATH SSO. Two enrollments are required for PATH Projects (Outreach and SSO).

HUD RHY Dashboard

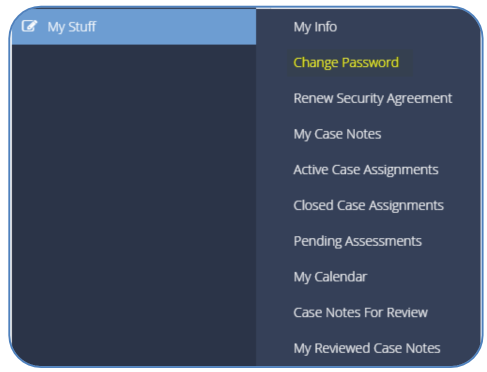
IMPORTANT: This assessment dashboard includes the RHY Main Assessment, RHY Critical Issues, and HUD RHY Exit.

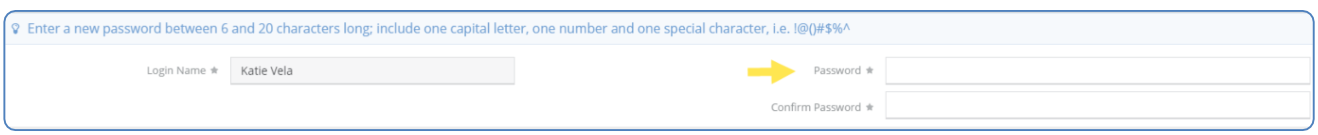


My Stuff Tab

Change Password

To change your password, click on the "Change Password" option and enter your password on the top and bottom field, and the click the "Save" button on the bottom right-hand side of the screen. Make sure your password has at least 6 characters, one capital letter, one number, and one special character.



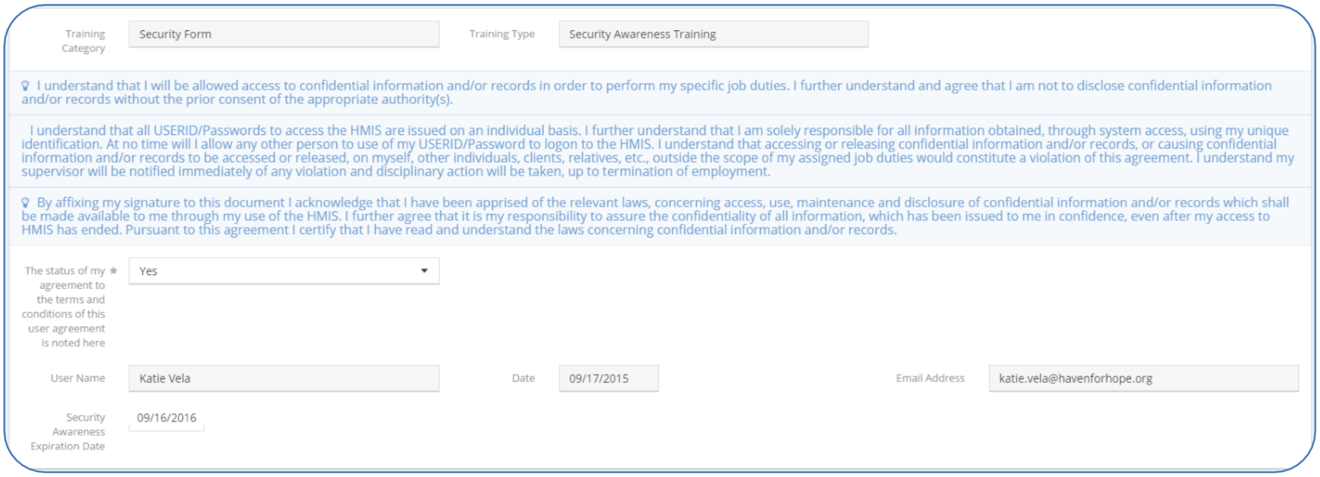


Renew Security Agreement

Every HMIS user must have a signed security agreement updated annually. The system will generate an automatic e-mail when you are 30 days from your security expiration. At this time, login to the HMIS, navigate to "My Stuff", and "Renew Security Agreement".

Click on "View Security Awareness Presentation" in the top right corner to see if there is any new information about HMIS Security. You will be held accountable for violating this agreement if files are accessed inappropriately or if the system is misused.

Once you have read the presentation, select "Add New" and complete the security form. **Your account will be updated for one more year.**



Training Category: Security Form
Training Type: Security Awareness Training

I understand that I will be allowed access to confidential information and/or records in order to perform my specific job duties. I further understand and agree that I am not to disclose confidential information and/or records without the prior consent of the appropriate authority(s).

I understand that all USERID/Passwords to access the HMIS are issued on an individual basis. I further understand that I am solely responsible for all information obtained, through system access, using my unique identification. At no time will I allow any other person to use of my USERID/Password to logon to the HMIS. I understand that accessing or releasing confidential information and/or records, or causing confidential information and/or records to be accessed or released, on myself, other individuals, clients, relatives, etc., outside the scope of my assigned job duties would constitute a violation of this agreement. I understand my supervisor will be notified immediately of any violation and disciplinary action will be taken, up to termination of employment.

By affixing my signature to this document I acknowledge that I have been apprised of the relevant laws, concerning access, use, maintenance and disclosure of confidential information and/or records which shall be made available to me through my use of the HMIS. I further agree that it is my responsibility to assure the confidentiality of all information, which has been issued to me in confidence, even after my access to HMIS has ended. Pursuant to this agreement I certify that I have read and understand the laws concerning confidential information and/or records.

The status of my agreement to the terms and conditions of this user agreement is noted here *: Yes

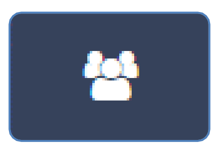
User Name: Katie Vela
Date: 09/17/2015
Email Address: katie.vela@havenforhope.org

Security Awareness Expiration Date: 09/16/2016

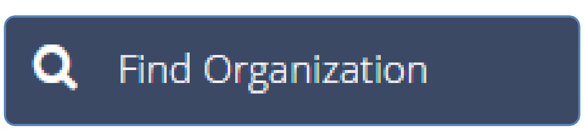
You can check back any time to see your security agreement expiration date.

Organization Workspace

The Organization Tab can be accessed by clicking here, located top, slightly left of the center:



The first step you should take when entering the Organization Tab is click the link labeled "Find Organization" on the left side of the screen and select your Organization from the list.



Resources

By clicking on Resources, another menu will display with several options:

- Program Client Service
- Resource Wait List
- Program Bar List
- Program Wait List
- Providers

Providers

Providers are similar to departments within an organization. For example, Haven for Hope is an organization and a provider within Haven for Hope might be "Spiritual Services" or "Workforce Development." To view a list of available providers for a selected organization, click on Providers in the Navigation panel that will display after selecting Resources. The Provider Summary page will display all available providers within the organization.

	Provider Name
	Haven for Hope- Employment Readiness Services
	Haven for Hope- Case Management
	Haven for Hope- Facilities
	Haven for Hope- Intake
	Haven for Hope- ID Recovery

A list of options is available by clicking on the action gear on the left of the provider. To view a list of available Resources for a selected Provider click on the action gear located left of the Provider's name and click on Resources.

- Resources
- Scan Service Posting
- Referrals To Provider
- Bed Inspections
- Shared Living Responsibilities

If there are any resources tied to that provider, they will appear similar to the list below:

An example of a resource would be a classroom. The organization may be Haven for Hope, the provider (or department) may be "Education Services," and a resource to Education Services may be "Classroom 1."

	Resource Name
	H4H Family Dorm at H4H
	H4H Family Dorm at H4H
	H4H Family Dorm at H4H
	H4H Family Dorm at H4H
	H4H Family Dorm at H4H

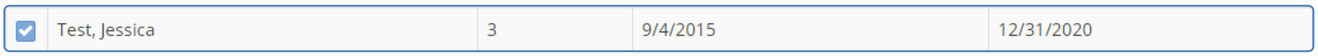
Reservations & Check-ins

Reservations and check-ins can be used for checking clients into a bed or a classroom. This is a great tracking system to see participation in classes and/or numbers of beds being occupied.

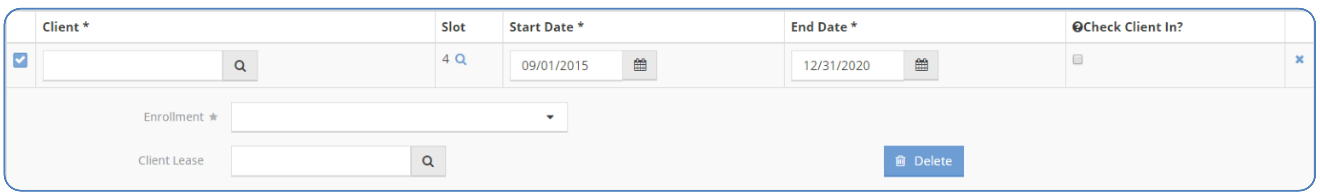
When you click the action gear next to a resource, a menu will appear with several options related to resources.

- Reservations/Check-Ins
- End Reservations/Check-Out
- Wait List
- Resource Log
- Housing Check-In
- Availability Report
- Housing Exception
- Syllabus

Reservations and check-ins work similar to a hotel. Like a hotel, you must first create a reservation before you can check a client in. To reserve a spot within a resource, click "Reservations/Check-Ins" from the drop down list. A new screen will appear. Click "Search" and it will display all clients who have reservations for the date range you choose. To add a reservation for a client, click the "Add Row" button on the upper right-hand side of the screen.

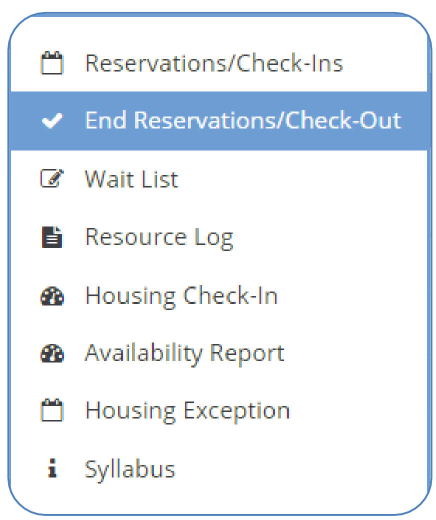


From there, you will be able to search for a client to add a reservation for. Click on the magnifying glass next to the "Client" field. This will open a Client Lookup search where you can find the client. Enter in the information you have on the client, and click the "Search" button on the right-hand side of the screen.

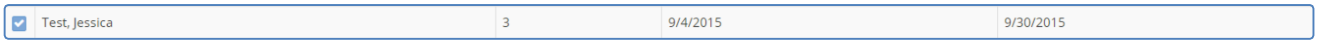


Select the correct client from the list, and fill in their start/end dates for the reservation if applicable. Also select the correct project enrollment necessary for the reservation. When you have finished doing this, check the box titled "Check Client In?". Next click the "Save" button on the bottom right-hand side of the screen.

To exit a client from a reservation you can follow these steps. Click on "Resources". Next click on "Providers". Select the appropriate provider and click on the action gear located on the left of the selected provider. Click on "Resources". Next click on the action gear next to the resource and click "End Reservation/Check-Out"



Click on "Search" and it will present you with a list of all the exits and clients currently enrolled into that resource for that month.



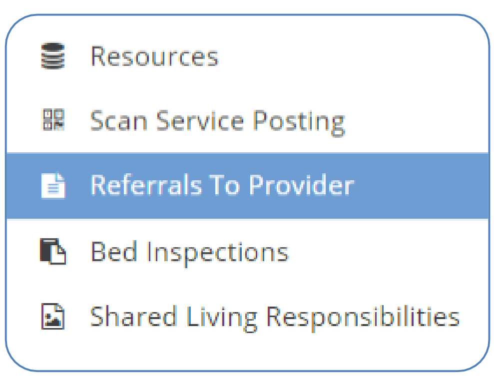
Click on the blue check box located to the left of the client's name. Check the box titled "End Reservation" and ensure that the "Reservation End Date" is correct and click "Save".

Referrals to Provider

To view all referrals to a provider, click on Providers under the Resources menu.

Click on the action gear next to the correct provider name and select "Referrals to Provider."

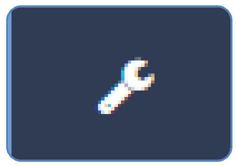
From there, you will get a master list of all clients referred to the provider of your choice.



Administration Workspace

The Administration Tab is used to run different types of reports within HMIS. There are reports in HMIS based on clients served, program summaries, services summaries, etc.

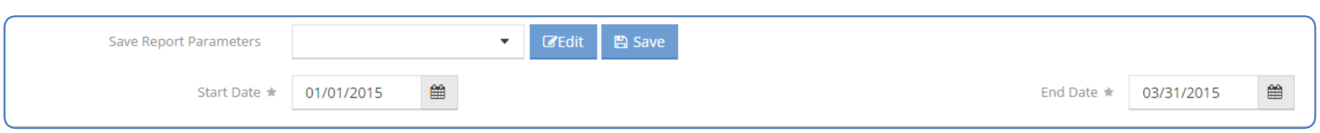
The Administration Tab can be accessed by clicking here:



To see a list of reports available, click on "Reporting" to see the list of folders:

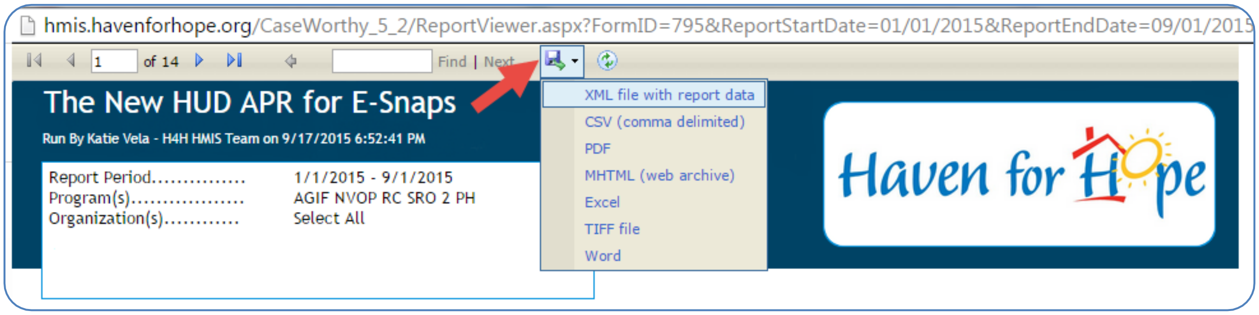
Launching a Report

To launch a report, select the report you are interested in running. The options on the launch page vary, but typically you will select a start date and end date, or timeframe, for the report. You may have other options such as organization, project, services, or user to select. **If it is a report you will run frequently, you can also save the report parameters:**

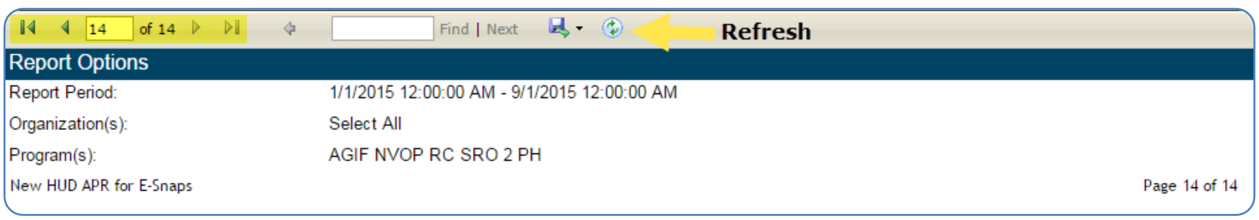


Basic Report Navigation

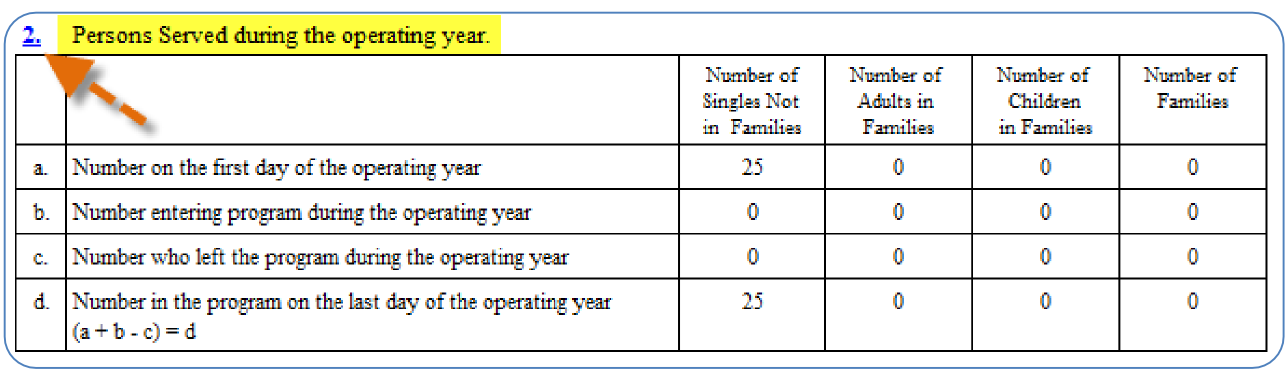
To print a report, you must first export it into another program from a drop-down menu on the top of the report. After you have exported, you will be able to print the report from another program.



On the upper left-hand side of the report, there are navigation buttons to go back and forth from page-to-page. There is also a **Refresh button on the top of the pag**e, in case you make a change in HMIS and want to see the effect on the report.



Also, you will be able to drill further into a report when a blue link is present. Below is an example. When you click on the blue number, it will actually show you the persons served during the operating year on a client level by name. You can find this throughout many of the reports within HMIS.



2. Persons Served during the operating year.

		Number of Singles Not in Families	Number of Adults in Families	Number of Children in Families	Number of Families
a.	Number on the first day of the operating year	25	0	0	0
b.	Number entering program during the operating year	0	0	0	0
c.	Number who left the program during the operating year	0	0	0	0
d.	Number in the program on the last day of the operating year (a + b - c) = d	25	0	0	0

Reports Available

Case Load Reports- Highlights

Case Load: A list of case managers/users is displayed with numbers of case assignments, unduplicated clients, active clients and inactive clients. A drill down report provides the names, SSN, and age of the clients who have been assigned, as well as the begin date, end date and status of their program enrollment. (Note: Case Manager must be assigned manually in HMIS for your program to use this report)

Data Quality Reports- Highlights

Length of Time: This report provides a list of clients enrolled in your program for any reporting period you select. The report lists how long each person has been a member of your program and can be exported to and filtered in Excel for analysis. ***Recommendation:*** *Run Once Per Quarter*

Timeliness: This report shows how quickly your staff enters data for new enrollees by comparing the enrollment begin date to the date the enrollment was actually created in HMIS. Check the HMIS Data Quality Plan for appropriate timeliness rates for your program type and monitor regularly. ***Recommendation:*** *Run Once Per Month*

Member Without Services: This report identifies members who have an open enrollment but have not received services within a specified amount of time (for example, 30, 60, 90 days).***Recommendation:*** *Run Once Per Month*

Program Reports- Highlights

Program Summary: View the clients enrolled in your program. Select one day and compare to your housing inventory to see how utilized your program is. This report is also useful to see client entry/exit dates. ***Recommendation:*** *Run Once Per Month (Select One Day Only)*

Program Service Summary: This report identifies the actual counts for services received by program. A breakout of families, adults, children, and seniors is available in this report.

HUD Compliance Reports- Highlights

Annual Performance Report (APR): This is a program-level report submitted to HUD on an annual basis. This report is meant for management in charge of submitting the report, but can be a useful tool to monitor overall progress of a program. The beginning and end dates can be edited to launch the report, but you should select your contract period if applicable. If assessments were not completed during the contract period, they will show up as missing on your APR, so make sure you edit them. ***Recommendation:*** *If CoC-Funded, Run Once Per Month*

Point in Time Count (PIT): This report makes the PIT count simple for your agency. Check-in all of your clients using the bed management software in HMIS and run the report. Use this report to monitor the accurateness of your bed check-ins. ***Recommendation:*** *Run Once Per Month, Run Once Per Week Leading Up to PIT Count*

SSVF: SSVF-funded programs can utilize these reports in HMIS. Clients will only show up on the SSVF Cover Sheet if they have a service recorded within the timeframe, and only count as placed if a "Residential Move-In Date" is recorded.

Service Reports- Highlights

Service Summary: This report displays the total amount of service provided for each service selected in the launch criteria. A drill down report provides information on the client receiving the service, their SSN, the user/case manager who provided/logged the service, as well as the date, the number of units of service received and the total service received.

User Reports- Highlights

User Login: A list of users who have logged into the system within the defined time-frame that indicates the user's status, total logins, last login, last logoff, total duration of time in the system and average duration. A drill down provides details related to each login. Pie charts at the top of the report depict top 10 users by duration and top 10 users by logins.