Running HMIS Reports for SPM Data Clean Up - 2021
Updated January 2021

Contents

A. Checking Enrollments (to ensure that your enrollment list is accurate, all clients who exited have been exited in HMIS, etc.)

You can run the "Clients in Program" report to check your enrollments for the SPM reporting period (10/1/19-9/30/20).

1. When logged in to HMIS, use the carousel at the top of the page to navigate to the Reports workspace. Click the right arrow until you see the Reports workspace. Click on the Reports workspace.
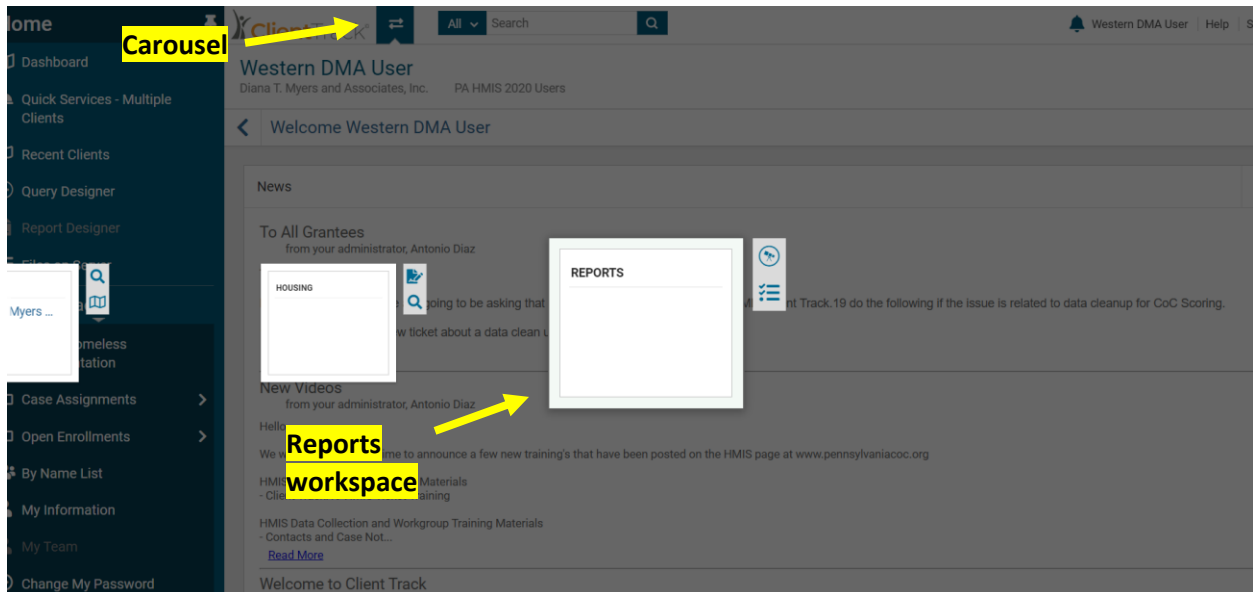
2. On the left-hand side of the screen, navigate to and click the "Enrollment Reports" menu. If your menu isn't visible, hover over the menu icon and select "Show the Menu" option.

3. Select "Clients in Programs" report.

    o Under Date Range, enter: 10/01/2019 - 09/30/2020

    o Under Report Type, select "Enrolled at any point"

    o Select your Organization

    o Select "Filter by Program" and select the appropriate program

    o You do not need to select any other filters

    o Click "Report" to run the report

4. Within your report window, you can click the small "plus sign" button to see all the clients enrolled in your program during the report period.

Click this plus size to see the clients enrolled in the program during the report period

Clients in Programs
10/1/2019 to 9/30/2020

Report Criteria:
Organizations:
Programs

	Enrolled	Exited	Total	Clients
	7	9	16	16

Program

5. Review the client list to ensure that any clients who were exited during the report period have an exit date. You can review the "Exit Date" column to make sure that any clients who exited during the report period have an exit date.

Enroll Date	Exit Date	Days	Enrollment Length
10/24/2018	1/12/2020	104	446
7/9/2018	1/12/2020	104	553
3/9/2020		206	206
6/19/2020		104	104
3/9/2020		206	206

6. If you identify any clients who should have been exited, please go into the client's dashboard and under the program enrollment select the blue drop down arrow to the left of the program. Then select "Exit the Enrollment". This will allow you to enter the correct exit date for the participant and any associated household members.
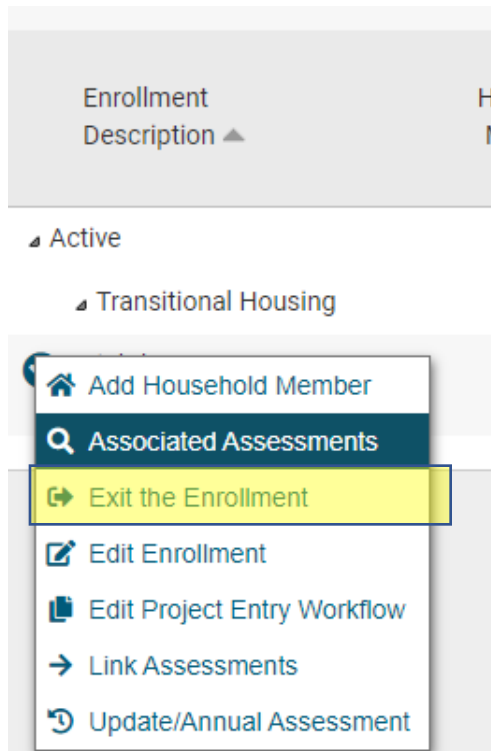

B. Checking that Annual Assessments have been completed

You can run the "Annual Assessments Data Check" report to check that all annual assessments were completed for the SPM reporting period (10/1/19-9/30/20).
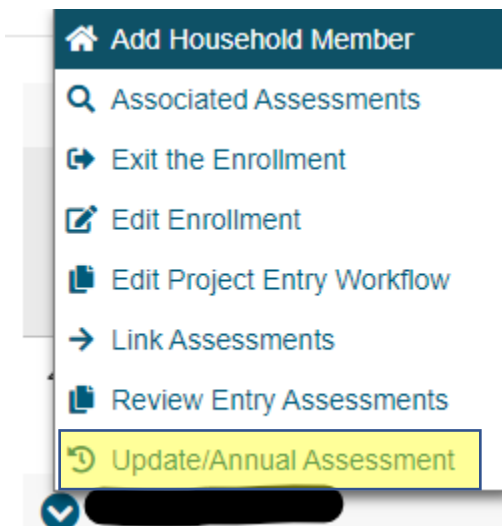
1. When logged in to HMIS, use the carousel at the top of the page to navigate to the Reports workspace. Click the right arrow until you see the Reports workspace. Click on the Reports workspace.
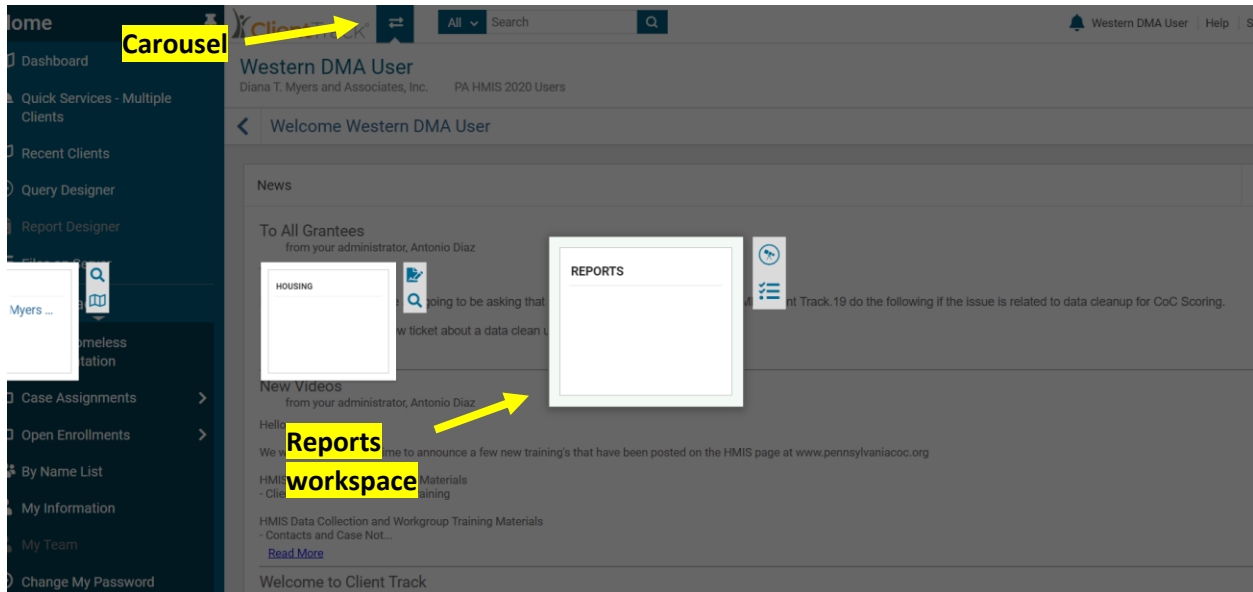
2. On the left-hand side of the screen, navigate to and click the "Custom Reports" menu. If your menu isn't visible, hover over the menu icon and select "Show the Menu" option.

3. Select "Annual Assessment Data Check" report.

   o Under Date Range, enter: 10/01/2019 - 09/30/2020

   o Select your Continuum of Care

   o Select your Organization

   o Select "Filter by Program" and select the appropriate program

   o You can also select the filter "Only include those needing Annual Assessment" under Required Annual Assessments section. If you select this, the report will only include clients that are required to have an annual assessment recorded based on the date range you entered.

   o Click "Report" to run the report

4. Within your report window, you can see a list of client and for each client you can see:

   o Annual Anniversary (Allowed Range) – the date of the participant's enrollment anniversary, and based on this anniversary date, when the annual assessment is due (Note: The annual assessment should be conducted during a 60-day window which includes the 30 days *before* the annual anniversary date and the 30 days *after* the annual anniversary date.)

   o Last Annual Assessment – the date that the last annual assessment was completed. If any annual assessments are "Missing", you will need to review the client's files to determine if an annual assessment was conducted but not recorded in PA HMIS. If this is the case, you can add the past annual assessment information to the client's HMIS

record. If you are unsure of how to do this properly, please submit a ticket requesting assistance from the PA HMIS team at DCED.

- o Annual Data Check – "Passed" means the annual assessment was entered on time. "Failed (not within date range)" means the annual assessment was not entered on time, but was entered. "Missing" means the annual assessment was not completed.

- o Last Annual Financial - when the last annual financial assessment was completed. If any annual financial assessments are missing, you will need to review the client's files to determine if an annual assessment was conducted but not recorded in PA HMIS. If this is the case, you can add the past annual assessment information to the client's HMIS record. If you are unsure of how to do this properly, please submit a ticket requesting assistance from the PA HMIS team at DCED.

- o Annual Data Check – "Passed" means the annual financial assessment was entered on time. "Failed (not within date range)" means the annual financial assessment was not entered on time, but was entered. "Missing" means the annual financial assessment was not completed.

5. If you identify any clients with missing annual assessments (even if they are now late), please check the client's file to determine if an assessment was completed during the 60-day window and can be added to the client's HMIS record. If such documentation exists, please go into the client's dashboard and under the program enrollment select the blue drop down arrow to the left of the program. Then select "Update/Annual Assessment". This will allow you to update the annual assessment information for the participant and any associated household members.

C. Checking that Income Information for participants was entered correctly

You can run the "Client Income Summary" report to review income reported in HMIS for all participants, for the SPM reporting period (10/1/19-9/30/20).

1. When logged in to HMIS, use the carousel at the top of the page to navigate to the Reports workspace. Click the right arrow until you see the Reports workspace. Click on the Reports workspace.
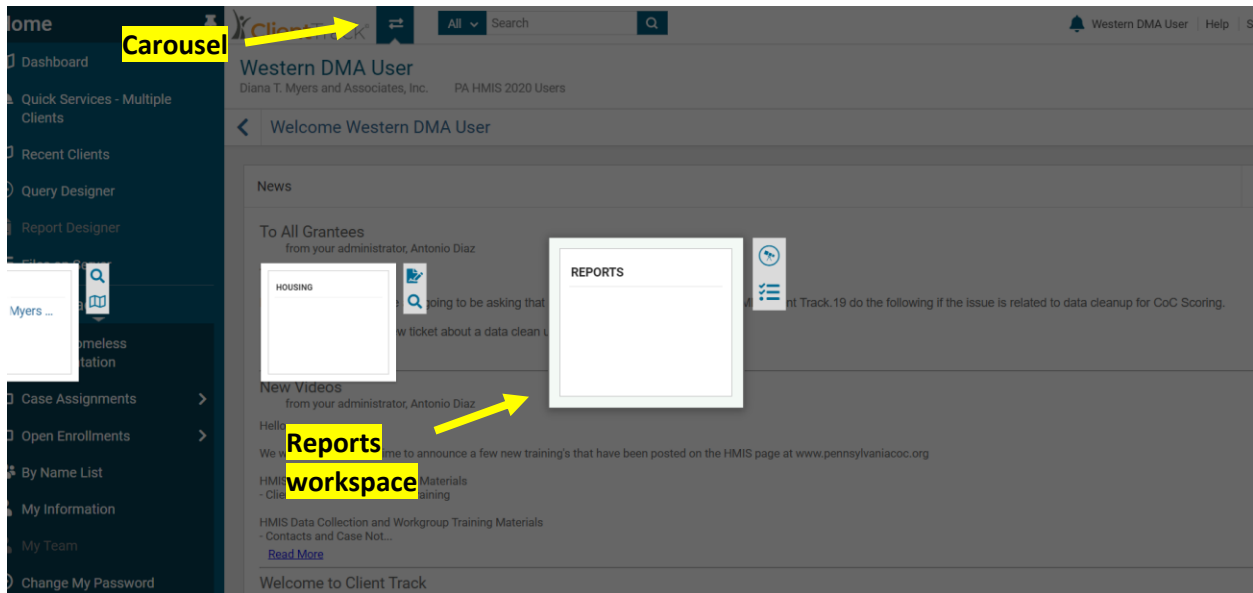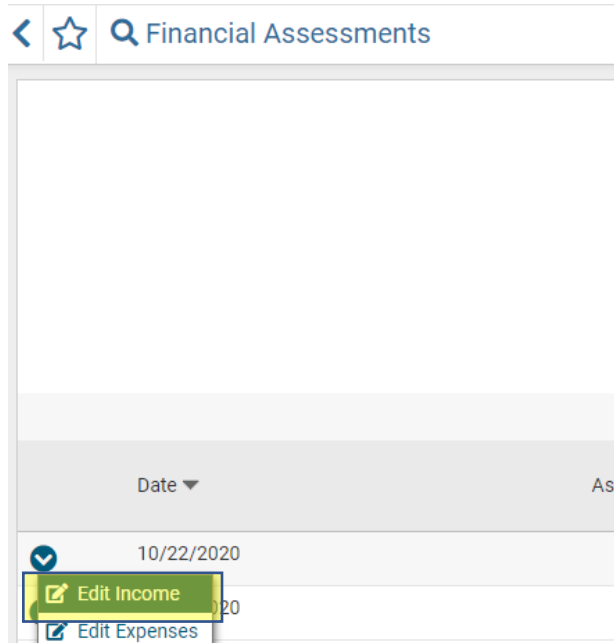

2. On the left-hand side of the screen, navigate to and click the "Custom Reports" menu. If your menu isn't visible, hover over the menu icon and select "Show the Menu" option.

3. Select "Client Income Summary " report.

    o Under Date Range, enter: 10/01/2019 - 09/30/2020.

    o Select your Organization.

    o Select "Filter by Program" and select the appropriate program.

    o Click "Report" to run the report.

4. Within your report window, you can see a list of clients and for each client you will see a list of all income updates completed for the client, and the monthly total income and monthly earned income.

Client Income Summary

10/1/2019 to 9/30/2020

Assessment Type	Assessment Date	Monthly Total Income	Monthly Earned Income
Income at Entry		$ 0.00	$ 0.00
Annual Assessment		$ 734.00	$ 0.00
Annual Assessment		$ 1497.00	$ 0.00

5. If you identify any clients with inaccurate income information for the assessment date period, you can go into the client's dashboard and select "Common Assessments" from the left hand menu. If your menu isn't visible, hover over the menu icon and select "Show the Menu" option. Then select "Financial Assessments." This will allow you to see all the financial assessments that have been completed for the participant. If you need to make corrections to any financial assessment, you can click the blue drop down menu for the corresponding assessment and select "Edit Income."


D. Checking that Exit Destination for participants was entered correctly

You can run the "Client Demographics Query" report to review income reported in HMIS for all participants, for the SPM reporting period (10/1/19-9/30/20).

1. When logged in to HMIS, use the carousel at the top of the page to navigate to the Reports workspace. Click the right arrow until you see the Reports workspace. Click on the Reports workspace.
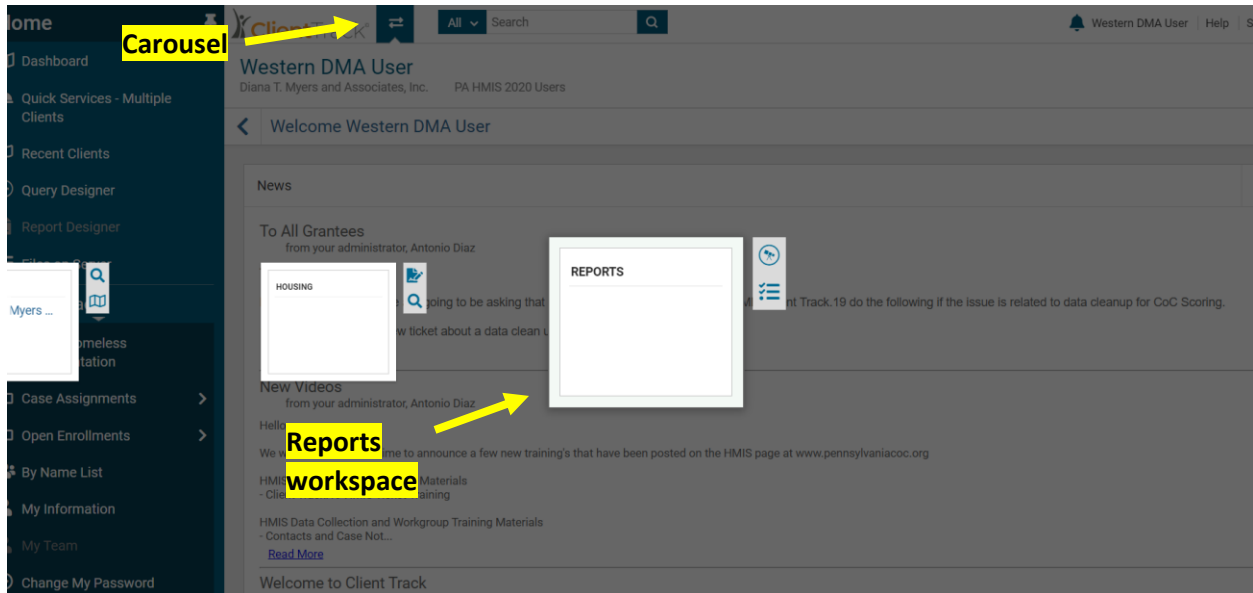
2. On the left-hand side of the screen, navigate to and click the "Custom Reports" menu. If your menu isn't visible, hover over the menu icon and select "Show the Menu" option.

3. Select "Client Demographics" report.

   o Under Date Range, enter: 10/01/2019 - 09/30/2020.

   o Select Run Report by Report Type: Exited. This will only show participants who exited during the date range (if you wish to see all participants, select "Enrolled at any point").

   o Select your Organization.

   o Select "Filter by Program" and select the appropriate program.

   o You do not need to select any other filters.

   o Click "Report" to run the report.

4. Within your report window, you can see a list of clients and for each client you will see various demographic information as well exit destinations for all participants (under "Destination" column).

Client Demographics Report
Custom Query
10/1/2019 to 9/30/2020

/	Race	Veteran Status	Disabling Condition	Domestic Violence	Fleeing DV	Chronic	Housing Status	Prior Residence	Destination
		No	No			No		Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or	Staying or living with friends, temporary tenure (e.g., room, apartment or house)
		No	Yes	No		No	Category 1 - Homeless	Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or	Rental by client, no ongoing housing subsidy
		No	Yes	No		No	Category 1 - Homeless	Jail, prison or juvenile detention facility	Jail, Prison, Juvenile Detention Facility

useholds:	3

5. If you identify any clients with inaccurate exit destinations, please go into the client's dashboard and under the program enrollment select the blue drop down arrow to the left of the program. Then select "Edit Exit Workflow". This will allow you to correct any inaccurate information from the exit assessment.
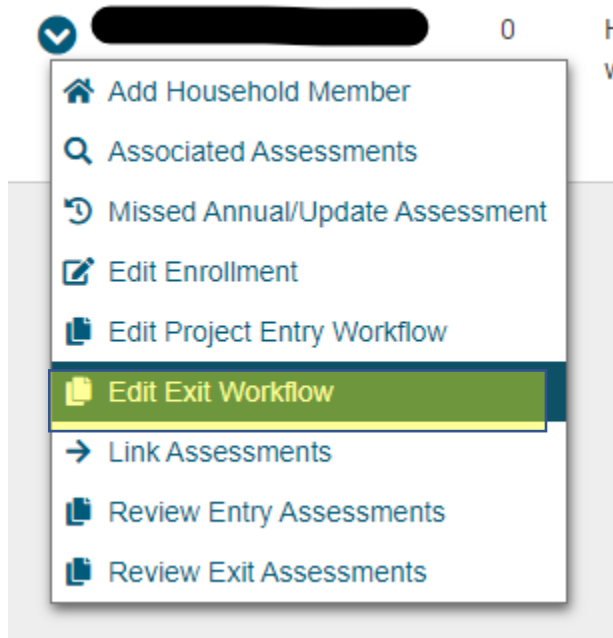
If you need assistance running or understanding these reports, please reach out to DMA at easterncoc@pennslvaniacoc.org or westerncoc@pennslvaniacoc.org. We will work together with the HMIS team to resolve any issues if needed.