

[GNRL-106] Program Roster

What information does a Program Roster Report provide?

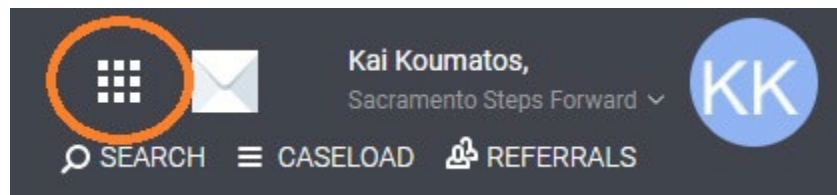
This program-based report lists program stay information for clients with the selected status in the selected programs. The status options are:

- Active: The client is actively enrolled for at least one day within the report date range
- Enrolled: The client's enrollment date is within the selected report date range
- Exited: The client's exit date is within the selected report date range.

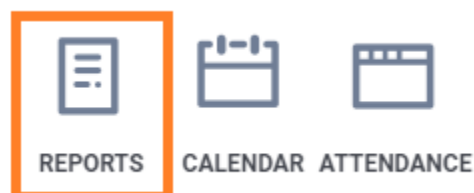
Note: A client will be listed more than once if they have enrolled in a program more than once in the report date range, or if they have enrolled in more than one program when multiple programs are selected.

Step 1: Navigate to the Reports Tab

To begin creating a program roster report, navigate to the launchpad at the top right corner.



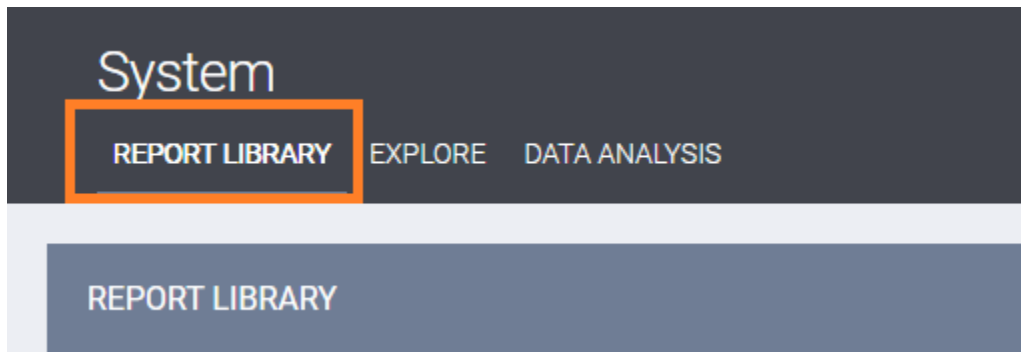
Click the reports icon to view all reports.



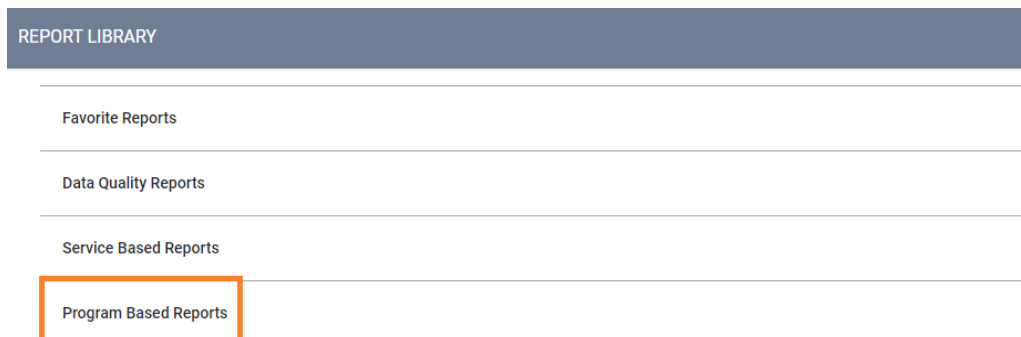
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Step 2: Finding the Program Roster in the Reports Library

Once you enter the Reports tab, ensure you are under the Reports Library Category.



Scroll down the list of reports to the Program Based Reports section.



From the Program Based Report section, locate [GNRL-106], and click "RUN".

[GNRL-106] Program Roster	★ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-220] Program Details Report [2022]	★ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-230] Program Group Income	★ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-240] Program Household Served Report	★ RUN 📅 SCHEDULE MORE INFO ▾

Step 3: Creating the Program Roster Report

Set the report parameters below on the preview screen. Follow the image and detailed instructions below.

Programs: In this section, you can choose which program(s) to run your roster for.

Status: You can choose between clients who were “Active”, “Enrolled” or “Exited” within the Report Range. Active means they were actively enrolled. Enrolled means that their enrollment date was within that reporting range. Exited means their exit date was within the reporting range.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s)



Choose...
Shelter Navigation

Status

HoHs Only?

Report Date Range

Report Output Format

Choose...
Choose...
Active within Report Date Range
Enrolled within Report Date Range
Exited within Report Date Range

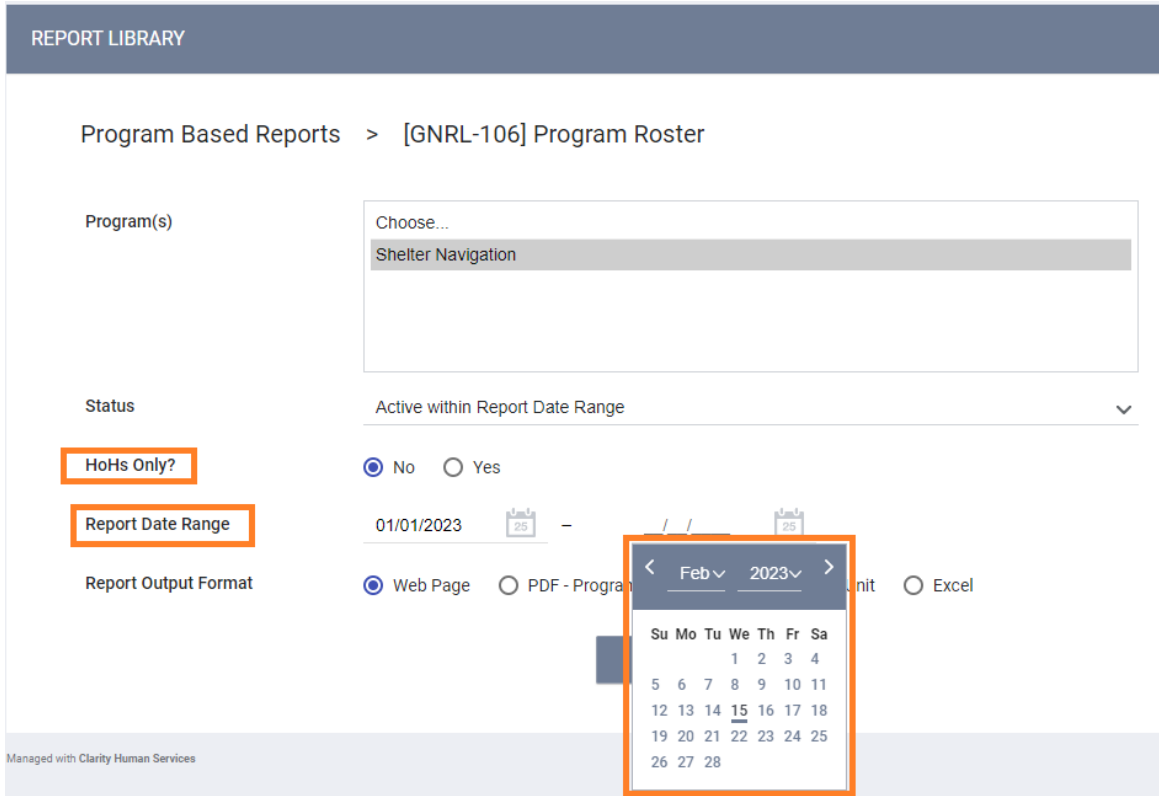
Web Page PDF - Program PDF - Program and Unit Excel

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HoHs Only?: HoH stands for Head of Household. When you are looking for information about households and not individual clients, it can be easier to only list the Head of Households (HoHs) in your roster. As a default, this is marked as “No”

Report Date Range: This is relatively self explanatory, but note that the system will not let you put in dates that won’t provide a proper date range (like having your first date after your second date)



REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s) Choose...
Shelter Navigation

Status Active within Report Date Range

HoHs Only? No Yes

Report Date Range 01/01/2023 - / / / / / /

Report Output Format Web Page PDF - Program Unit Excel

Managed with Clarity Human Services

Report Output Formats: The reports can be produced in a variety of formats. The most common are Web Page, PDF, and Excel. Here are the best ways to use these different formats:

The Web Page format is useful for a quick review of information that you do not need to save for later. It does not allow you to manipulate the data (the way the downloaded excel version will), however there are often live links in the web page format that will link you to a client’s profile page, a specific data quality issue, or a list of clients that make up a number on a report. The live links can be very helpful to track down specific data quality issues.

The PDF format is great for creating a downloadable document you can then share with others. This format also does not allow you to manipulate the data, but there are many live links in this format as well (though not as many as the web page). The PDFs are generally easy to read and provide information clearly.

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For the Program Roster, the PDF – Program will show you the normal information from a Program Roster whereas the PDF – Program and Unit provides additional information about which units your clients are housed in. As our HMIS does not use the Unit feature to assign clients to specific beds in more detailed housing inventory, there is no real benefit to having the additional unit information.

The Excel format is the most useful for manipulating the data. You can move columns around, sort for whatever stats you need, and add calculations. If you are adept at excel, this is an excellent option for pulling data you want to work with. The downside is that the data isn't attractive or necessarily easy to read.

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s) Choose...
Shelter Navigation

Status Active within Report Date Range ▼

HoHs Only? No Yes

Report Date Range 01/01/2023 - 02/15/2023

Report Output Format Web Page PDF - Program PDF - Program and Unit Excel

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