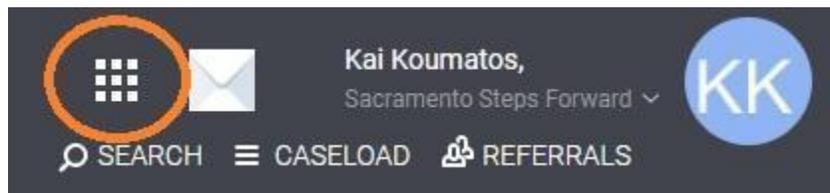HMIS Job Aid

Running Attendance by Days Served Report [GNRL-111]

When to run an Attendance by Days Served Report and what information does it provide?
This is a service-based report that determines clients who are nearing automatic exit from the system because they lack a recorded service in their profile for more than 90 days. Also it includes details of all clients, according to housing status and veteran status, who have received selected service item(s) for a specified period of time.

Step 1: Navigate to the Reports Tab

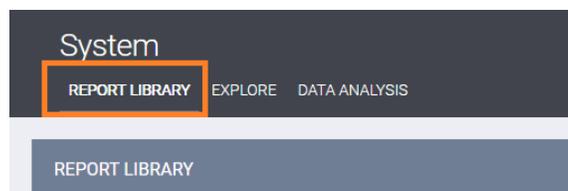To begin pulling a report, navigate to the launchpad at the top right corner.

Click the reports icon to view all reports.

Step 2: Finding the [GNRL-111] Attendance by Days Served Report in the Reports Library

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

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

REPORT LIBRARY	
Favorite Reports	2 report(s) ⌄
HUD Reports	8 report(s) ⌄
Data Quality Reports	6 report(s) ⌄
Administrator Reports	52 report(s) ⌄
Service Based Reports	13 report(s) ⌄
Program Based Reports	21 report(s) ⌄

From the Service Based Report section, locate [GNRL-111], and click "RUN".

Service Based Reports	13 report(s) ⌃
[EXPS-101] Funding Source Financial Detail	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[EXPS-102] Service Expense Review	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[GNRL-102] Client List	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[GNRL-103] Service Census [Service Based]	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[GNRL-104] Service Summary [Service Based]	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[GNRL-111] Attendance by Days Served	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[GNRL-112] Client Address / Location	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄
[GNRL-211] Service Issuance Summary [Service Based]	★ | ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄

Step 3: Running the report [GNRL-111]

To choose the report parameters, follow the images and detailed instructions below.

Service Item(s): Select All for this section to see all the potential services that have been recorded in client profiles.

Veteran Status: Please click all to allow for all clients to appear on the report.

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Report Date Range: Select the date range to be 90 days prior to the current date. Clients get auto-exited if there is not a service recorded within that time period.

Report Date Range	05/23/2023	–	08/21/2023
Report Output Format	○ Web Page	○ PDF	⦿ Excel

SUBMIT ⇐

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

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.

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.

When you have added in the correct parameters, click "Submit" to run the report.

SUBMIT ⇐

Directions for running reports & cross referencing

<mark>**Service Summary [Service Based]**</mark> ran as a webpage for the program housing service, then clicking the number to get the list of clients and the date ranges of their housing service.

- example HSP under DHA
- under service based reports on canned reports
- service summary
    - service items, select just rent assistance sections
    - report date: end date is todays date, prior date is 3 months out, 90 days
    - run as excel
    - service period = the last date show when the last service was provisioned
    - grab the ID, client name, service period and put in excel

Training section

- program roster run = active today on report range , run as excel, grab the UIDs

- back to the service summary, paste the UIDs at the bottom

- click A, conditional formatting, highlight cells, duplicate values

- look at the bottom and the white ones don't have a service

USE this one:

ALL Programs: Cottage example: PSH

Attendance by Days Served Report could run as an excel selecting the date range for the last month

- date range would only be today for PSH
- all other services do 3 months
- run as excel and do conditional formatting to see check in on clients are missing services (highlighted ones are good)

   service report

- all programs can use
- all items
- 90 days
- excel run
- copy UIDs

go into program roster

- paste at the bottom of the roster
- highlight the UID row
- conditional formatting - highlight - duplicates

Service Issuance Summary [Service Based] ran as a webpage