

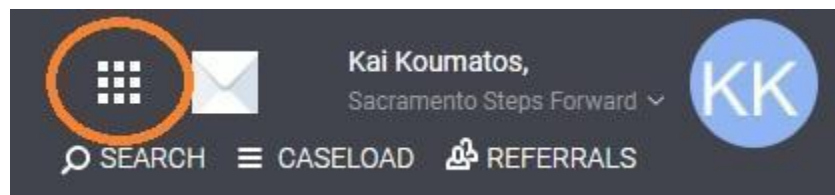
[EXIT-101] Potential Exits Report

When to run a Potential Exits Report and what information does it provide?

This is a program-based report that lists clients who are active in the program but have not received services, case notes, unit connections, or CE events or program-connected assessments since the selected cutoff date. This determines which clients are at risk of being auto-exited from programs in HMIS. We highly recommend running this report every month to ensure there are no clients likely to be auto-exited from your program.

Step 1: Navigate to the Reports Tab

To begin pulling an [EXIT-101] Potential Exits Report, navigate to the launchpad at the top right corner.

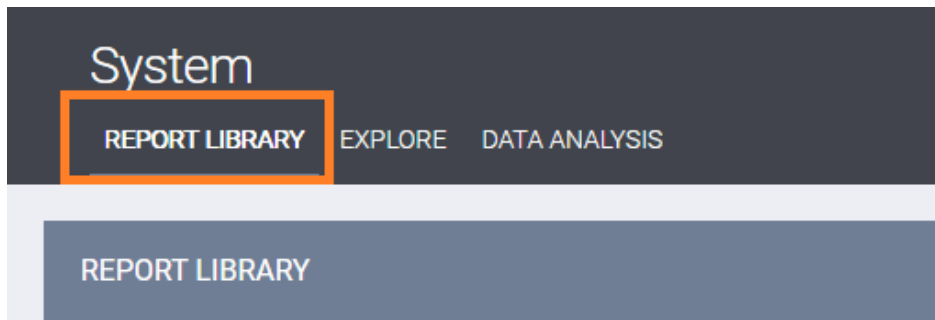


Click the reports icon to view all reports.

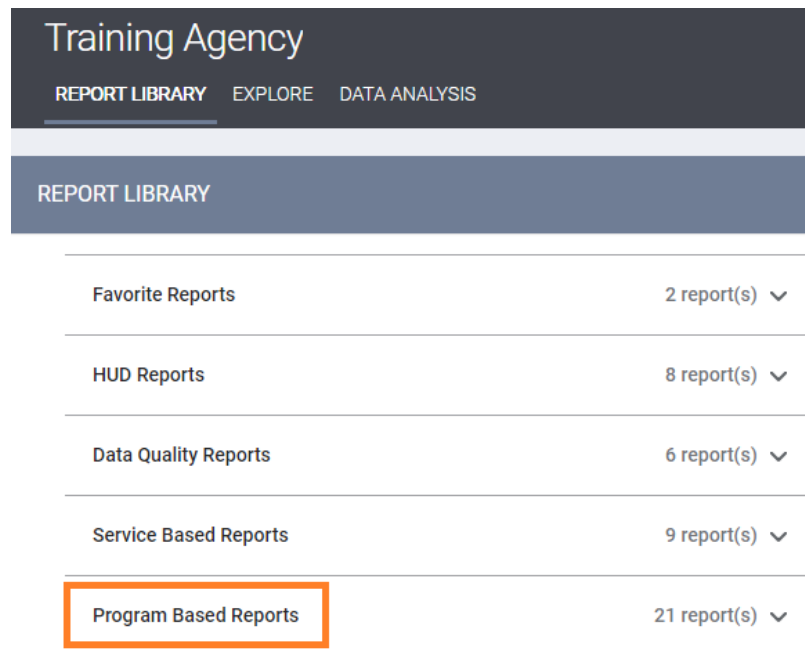


Step 2: Finding the [EXIT-101] Report in the Reports Library

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.



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From the Program Based Reports section, locate [EXIT-101] Potential Exits, and click “RUN”.

A screenshot of the Training Agency Report Library interface. The top navigation bar includes "REPORT LIBRARY", "EXPLORE", and "DATA ANALYSIS". Below this is a "REPORT LIBRARY" section with a list of report categories: "Favorite Reports" (2 report(s)), "HUD Reports" (8 report(s)), "Data Quality Reports" (6 report(s)), "Service Based Reports" (9 report(s)), and "Program Based Reports" (21 report(s)). The "Program Based Reports" category is expanded, showing a list of reports. The report "[EXIT-101] Potential Exits" is highlighted with an orange border. To its right are icons for "RUN", "SCHEDULE", and "MORE INFO".

Step 3: Running the [EXIT-101] Potential Exits Report

To choose the report parameters, follow the images and detailed instructions below. You can choose all or multiple programs and the report will reflect the total of all of the data.

A screenshot of the Training Agency Report Library interface showing the parameters for the "[EXIT-101] Potential Exits" report. The top navigation bar includes "REPORT LIBRARY", "EXPLORE", "DATA ANALYSIS", and "PREVIEW". Below this is a "REPORT LIBRARY" section. The breadcrumb trail shows "Program Based Reports > [EXIT-101] Potential Exits". The "Program(s)" field is a dropdown menu with "All" selected. The "Cut off Date" field shows "07/07/2023" with a calendar icon and a red arrow pointing to "60 Days Prior". The "Report Output Format" field has three radio buttons: "Web Page" (selected), "PDF", and "Excel". A "SUBMIT" button is located at the bottom right.

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Programs: Select the program (s) that you want to monitor potential auto-exits for.

Cut off Date: Set the cut-off date to be 60 days prior to the current date. This will provide you with a list of clients who will be auto-exited in 30 days, which gives you ample time to add services into the program enrollment.

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:

Recommended: 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 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 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 set the correct report parameters, click SUBMIT to export the report.

Report Output Format

Web Page PDF Excel

SUBMIT

