

Use Client Services Search to Answer Questions About Agency HMIS data BEFORE Reporting

1. How many active clients do I have in this program?
 - In blue search area, Active=yes


Scenario: You may be asked to report out on current program enrollment
2. How Many households in this program?
 - After pulling up all active clients, scroll over to 'Head of Household' field in the Customer Listing grid and filter for 'true'

Scenario: You may be asked to report out on current program enrollment for families
3. How many exited clients do I have in this program?
 - In blue search area, Active=no

Scenario: You may be asked to report out on whether you are keeping up on your exiting of clients after services are complete
4. How many exited households do I have in this program?
 - After pulling up all exited clients , scoll over to 'Head of Household' field in the Customer Listing grid and filter for 'true'

Scenario: You may be asked to report out on whether you are keeping up on your exiting of families after services are complete
5. Have I entered any clients in this last month?
 - After pulling up all active clients, scroll to 'program date' and check for the array of dates

Scenario you may be asked if you are keeping current with your data entry
6. Have I exited any clients in this last month?
 - After pulling up all non-active clients (those exited with an end date), scroll to 'end date' and check the array of dates

Scenario: you may be asked if you are keeping current with your exits
7. Do I have all the right clients in this household?
 - Highlight individual rows and click on  in the blue search area, which will take you first to HOH Intake, then you can go to Household Statistics

Scenario: counts of people in households seems to be off, can you check this for me?
8. Have I recorded Agency Identifiers for each client with 'consent refused'?
 - After pulling up either active or non-active clients, scroll over to the 'Identifier' field in the Customer Listing grid to examine that data

Scenario: agency policy is to use a certain format for identifying clients who refused consent. This is a quick way to confirm that it is consistent.
9. If I have a single gender program, are the genders recorded appropriate?
 - After pulling up either active or non-active clients, scroll over to the 'Gender' field in the Customer Listing grid and examine that data, correct as necessary

Scenario: a manager in the agency just ran a report and noticed that our men's program has several clients identified as female. This is a quick way to check it out
10. Who entered the data for this program (agency resource)?
 - After pulling up either active or non-active clients, scroll over to the 'Resource' field in the Customer Listing grid to see which agency staff entered the client information

Scenario: someone in the agency seems to be doing data entry differently that other staff. Can we see who might need some coaching?
11. What is the system generated ID for each of the clients in the program?
 - After pulling up either active or non-active clients, scroll over to the 'ID' field in the Customer Listing grid and take note of the system generated ID for each client

Scenario: We have a lot of clients that refuse consent. We are getting confused between them. I wish there was a way to know the system generated ID in the HMIS.