



# Agency Administrator: System Administration and Basic Reporting

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# 1. Agency Administrator's Role and Responsibilities

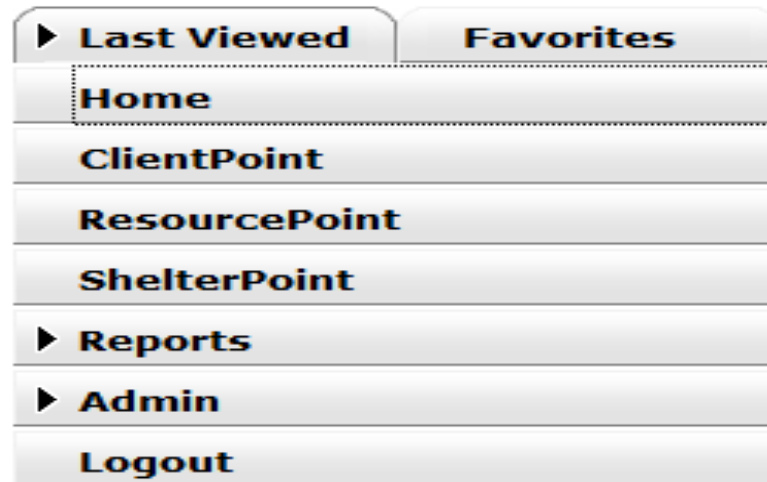
The Agency Administrator is The Community Partnership's (TCP) primary contact person for HMIS and all other data & reporting issues for your agency. This person is responsible for ensuring that your program(s) data is accurately entered into the system and that all users are trained, as well as for communicating any system issues to TCP. The HMIS Coordinator and other members of the TCP Data and Performance Measurement Team will contact the Agency Administrator about any HMIS or other reporting issues with the expectation that he will disseminate information to the relevant staff persons within the agency.

## 2. The Community Partnership Data and Performance Measurement Staff

- Tom Fredericksen, Chief of Policy and Programs
- Stephen Halliburton, Research Assistant
- David Tweedie, Coordinated Entry Administrator

# 3. Accessing Reporting Functions in HMIS

All reports in the HMIS can be accessed through the **Reports** tab. The Reports tab can be found on the left hand side of the window as you're facing the screen. Clicking on the Reports tab will take you to the **Report Dashboard**.






# Accessing Reporting Functions in HMIS

## Report Dashboard:

Report Dashboard












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**Audit Reports**

 Audit Report	 User Information	 User Login
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**Provider Reports**

 Annual Homeless Assessment Report (AHAR)	 Call Record Report	 Client Served Report	 Daily Unit Report	 Entry/Exit Report
 HUD-40118 APR	 Needs Report	 Outstanding Referrals	 PATH	 Service Transaction
 SSVF Export				

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**Custom Reports**

 ART	 ReportWriter
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# 4. ServicePoint Reports

ServicePoint reports are accessible directly through the Report Dashboard. These reports are accessible to any user with a ServicePoint user license:

- Entry/Exit Report
- Clients Served Report
- Service Transaction Report
- Daily Unit Report

When a client's information is updated in HMIS, those changes will be reflected in the ServicePoint Reports immediately.

# Entry/Exit Report

The Entry/Exit Report provides data on clients with a program entry during a given time period. It will provide the number of clients who were in the program on the first day of the report period, how many entered during the report period, and how many exited during the report period.

It will provide veteran status, race and ethnicity, disability information, and prior living situation for all clients with a program entry during the report period.

It will also provide income at entry vs. exit, length of stay, reasons for leaving, and destination information for clients who exited the program during the report period.



# Entry/Exit Report Logic

In order to appear in the Entry/Exit report, clients must have:

- A program entry
- The correct entry type. All programs except SSVF and HPRP use HUD-type program entries. SSVF uses VA-type program entries and HPRP uses HPRP-type program entries.

Reasons clients will not pull into the report or pull to the report inaccurately:

- The client or household was not inputted in to the HMIS
- The client or household was inputted into the HMIS, but not given a program entry OR given the wrong type program entry
- Households were not configured properly
- Members of the same household were not given a linked program entry

For Permanent Supportive Housing:

- The count of persons in Question 4 *should equal* the count of persons in Question 4. Clients with **“Yes”** responses to the *“Is Client Homeless?”* question and/or **“Literally Homeless”** responses to the *“Housing Status”* question will not draw into Question 4.

For Emergency/Temporary Shelter, Transitional Housing, or any non-Permanent Housing provider:

- The count of persons in Question 4 *should be zero*. Clients with **“No” or missing** responses to the *“Is Client Homeless?”* question and/or **non-“Literally Homeless”** responses to the *“Housing Status”* question will not draw into Question 4.

# Clients Served Report

The Clients Served Report will provide information for clients who have at least one service transaction for a given period. Information will be broken out by:

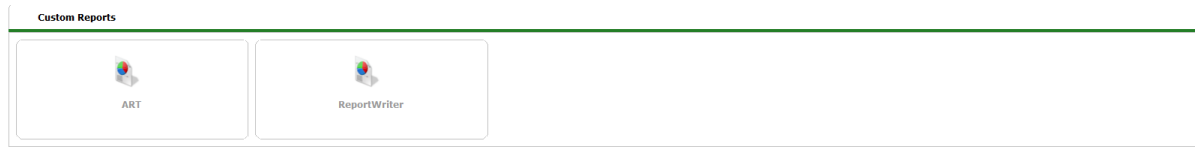
- Service Type
- Adults and Children
- Persons in Families and Singles
- Race and Ethnicity

# Service Transaction Report

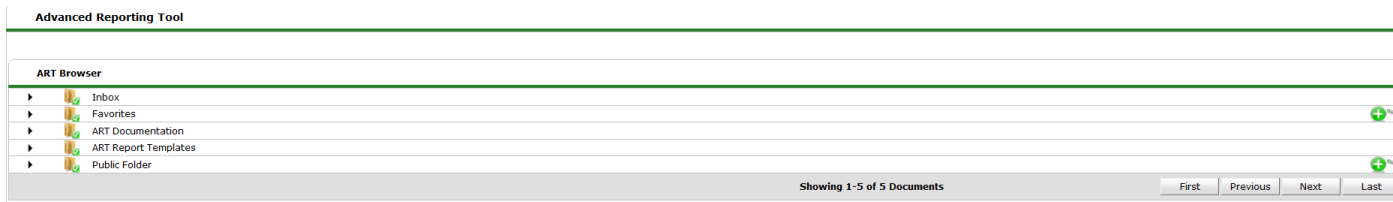
The Service Transaction Report provides a list of clients who have at least one service transaction during a given date range.

# 5. Advanced Reporting Tool (ART) Reports

ART reports are only accessible to users with a ServicePoint user license **AND** an ART license. ART reports are accessed by going to the **Custom Reports** section of the Reports Dashboard and clicking on ART.



This will take you to the **Advanced Reporting Tool** menu.



Providers will go the **Public Folder** to access all ART reports. The following reports are available to all providers:

- Program Data Detail: data quality
- Annual Performance Report (APR): program outcomes
- Self Sufficiency Outcomes Matrix (SSOM) Reports

ART updates once a daily; therefore, when a client's information is updated in HMIS, those changes will not be reflected in the ART reports until the 3:00am the next morning.

ART will allow reports to be downloaded and saved in Excel or as a PDF.

# Program Data Detail Report

Within ART's Public Folder, in the Data Quality subfolder:

The Program Data Detail report shows data elements from the profile screen for *all clients with a program entry during a given time period*. This report should be used by providers using program entry and program exit to determine length of service.

These allows you to check the accuracy and completeness of client records.

# Accessing the Program Data Detail Report

- Click the **Reports** tab;
- You will then be taken to the **Report Dashboard**. You will select **ART** (Advanced Reporting Tool);
- From there you will be taken to the ART menu; in this menu you will see a series of folders. Open the **Public Folder**;
- When you open the Public Folder a series of subfolders will appear; open the **Data Quality** subfolder;
- Finally, you will either click the magnifying glass next to the **Program Data Detail (Post 2014 Data Standards)**

# APR

The APR provides the same kind of data reported in the Entry/Exit report in ServicePoint:

- Number of clients who were in the program on the first day of the report period;
- Number of clients entered during the report period, and exiting during the report period;
- Demographic information on all clients served during the report period; and
- Income at entry vs. exit, length of stay, reasons for leaving, and destination information for clients who exited the program during the report period.

# Accessing the HUD APR

- Click the **Reports** tab;
- You will then be taken to the **Report Dashboard**. You will select **ART** (Advanced Reporting Tool);
- From there you will be taken to the ART menu; in this menu you will see a series of folders. Open the **Public Folder**;
- When you open the Public Folder a series of subfolders will appear; open the **HUD** subfolder;
- Finally, you will click the magnifying glass next to the report titled: **Annual Performance Report (APR) 0625 V26**



# Goals, Case Notes, and Action Steps Report

This report provides information on clients with case plans in the HMIS. It will provide all:

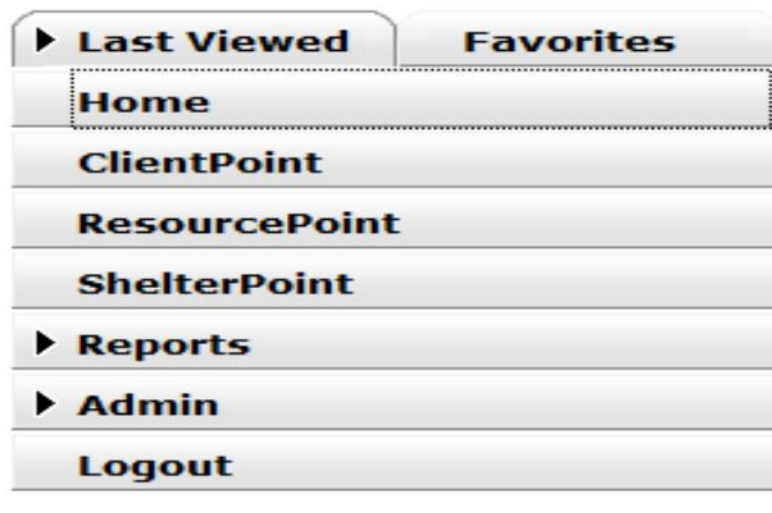
- Goals
- Case Notes
- Action Steps

# Accessing the Case Plan Audit Report(Identified)

- Click the **Reports** tab;
- You will then be taken to the **Report Dashboard**. You will select **ART** (Advanced Reporting Tool);
- From there you will be taken to the ART menu; in this menu you will see a series of folders. Open the **Public Folder**;
- When you open the Public Folder a series of subfolders will appear; open the **Data Quality** subfolder;
- Finally, you will either click the magnifying glass next to the **Case Plan Audit Report(Identified)**

# 6. System Administration

Administrative functions in the HMIS can be accessed through the **Reports** or **Admin** tabs. The Reports and Admin tab can be found on your left hand side of the window as you're facing the screen.










Clicking on the Reports tab will take you to the **Report Dashboard**.

Clicking on the Admin tab will take you to the **Admin Dashboard**.

# System Administration

## Admin Dashboard

**Admin Dashboard**

 Email Admin	 License Admin	 News Admin	 Provider Admin	 Provider Groups
 Provider Preferences	 User Admin			

# Adding Users and Resetting Passwords

- Adding New Users
  - Click the **Admin** tab;
  - You will then be taken to the **Admin Dashboard**. You will select **User Admin**;
  - Click **Add New User**.

Providers should do this **BEFORE** submitting a user agreement to get a license assigned to new users.

- Resetting a Password
  - Click the **Admin** tab;
  - You will then be taken to the **Admin Dashboard**. You will select **User Admin**;
  - Search for the user whose password you need to reset;
  - Click **Generate Password**;
  - The system will reset the password to a series of numbers and letters which will appear in the **Password** box. You can either send your user this system generated temporary password or type something else over it. Typically, Administrators set this to hmis1234 or password1234. In either case be sure to click **Save & Exit** once the password has been reset so that system can refresh and the temporary password will become activated.

**NOTE:** When you reset a password; the password you create is a **temporary password**. When the user logs in he will be asked to create his own password. Passwords are **NEVER** to be shared by users. If you have a staff person who needs to access the HMIS but does not have a license please contact the HMIS Coordinator and he will give them access to the system.

# Audit Report

The Audit Report is accessible through the Report Dashboard, but is only available to users designated as an Agency Administrator. The Audit report allows the Agency Administrator to the following information for a given user during a given period:

- Date and time of all logins during the time period;
- What the user did (create a record, update a record read a record, or delete a record); and
- The name of the client whose record the user accessed

# Provider Page HUD Standards Information

The provider page can be accessed through the **Provider Admin** tab. From within the “Provider Search Results,” click on your program’s name. Select the **Standards Information** tab. Under “HUD Standards Information,” complete each of the data elements except “Grantee ID.” This includes *Organization Identifier, CoC Code (DC-500 for each program), Program Type Code, Direct Service Code, Program Site Configuration Type, Site Type, Housing Type, Geocode (110006 for each program), and Method for Tracking Residential Program Occupancy*. Once completed, select “Save & Exit.”

HUD Standards Information	
Organization Identifier	The Community Partnership for the Prevention of Homelessness (2) ▼
COC Code	DC-500
Program Type Code	Other (HUD) ▼
Direct Service Code	<input checked="" type="radio"/> Yes <input type="radio"/> No
Program Site Configuration Type	Single site, single building ▼
Site Type	Non-residential: services only ▼
Housing Type	Non applicable: non-residential program ▼
Geocode	110006
Grantee ID	
Method for Tracking Residential Program Occupancy	Program Entry and Exit Comparison ▼



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NO "WWW"