2018

HMIS Guide to the Active Client List Report

An HMIS End User Training Resource

This guide will demonstrate how to run the HMIS Active Client List.

City of Philadelphia
Office of Homeless Services

HMIS Active Client List

This HMIS Active Client List is a new report in ClientTrack that lists all of the active clients enrolled in a project, and some of their demographic and household information. This report can also be used for viewing all of the active clients in HMIS, clients assigned to a Case Manager, or as a tool to use for data quality purposes.

After running the HMIS Active Client List, HMIS users have the option of downloading the report as an excel file. The excel file will provide all of the fields that are listed below for all of the clients actively enrolled in the project(s) selected. The fields that are bold also have brief descriptions listed below.

- Project name
- Project type
- **Case ID**
- Client ID
- Client Name
- **Age**
- DOB Quality
- SSN
- SSN Quality
- Race
- Ethnicity
- Gender
- Veteran Status
- **Enroll ID**
- **Enroll Date**
- **Relationship**
- **Household Type**
- **Youth Household Type**
- Disabling Condition
- **Chronically Homeless**
- **Move-In Date**
- **Engagement Date**
- **Date Of Determination**
- **Federally Enrolled**
- **Runaway Youth**
- Exit Date
- Exit Destination
- **Entry Cash Income**
- **VA Medical**
- **Days Enrolled In Reporting Period**
- **Total Days Enrolled In Project**
- **Enrollment Number**

The **reporting period**, which is a term used throughout this document, refers to the date range that is selected when running the report. For example, if a report was run for, 1/1/2018 to 3/31/2018, then that date range is the reporting period.

Case ID: also referred to as a Household ID, a Case ID number is assigned to an entire household at every project start. When reviewing Active Client List, this field can be used to identify which client records are properly linked as a household by looking at client records with the same Case ID. If a member of a household has a different Case ID than the rest of the household, this could indicate that the household is not connected.

Age: the age of the client at the start of the reporting period. If the reporting period was 2/1/2018 to 2/28/2018, then the age would be the client's age as of 2/1/2018. This is different from other reports, such as the APR, which uses the age of the client at project entry.

Enroll ID: a unique number associated with a client's entry into a project. If a client enters a project multiple times during the reporting period, the report will list the client record twice, with two distinct Enroll IDs.

Clients listed more than once with a duplicated Enroll ID are indicators of an enrollment error. To correct this, please reach out to a System Performance Analyst. Their contact information is provided at the end of this guide.

Enroll Date: the date that the client's participation in the project started. This definition can vary by project type, as described below.

HUD's Definition of the **Enroll Date** by Project Type[1]

- **Street Outreach**: date of the first contact or interaction with the client.
- **Emergency Shelter**: first night the client stayed in the shelter for a consecutive period from entry to exit. For night-by-night shelters, project start date for the night the client first stayed and will allow clients to re-enter as necessary.
- **Safe Haven** and **Transitional Housing**: the date the client moves into the residential project
- **Permanent Housing** (All types, including **Rapid Rehousing**): the date the client was admitted into project. To be considered admitted, the client must meet the project's eligibility criteria, indicate that they want to enroll in the project, and be able to access services and housing through the project, if not right immediately, then in a reasonable amount of time.

[1] U.S. Department of Housing and Urban Development (2017). *HMIS Data Standards Manual.* Page 29.

Relationship: this field identifies the client's relationship to the head of household. Responses include: *Self (head of household), Head of Household's child, Head of Household's spouse or partner, Other: non-relation member,* and *Head of Household's other relation member (other relation to head of household).*

If a client's Case ID is unique, their relationship should be marked as *Self (head of household)*. If the client is not marked as such, it may indicate that the client is not properly attached to the household.

Household Type: households are classified as one of the three categories listed below:
- Adults Only: Single Individuals or Households without any children under the age of 18
- Adults with children: Households with at least one child under the age of 18
- Children Only: Individual Youth or Youth households without an adult over the age of 18

Youth Household Type: this field will populate with a "Yes" if the client's household is considered a Youth Household, which refers to a household that only contains members with a valid date of birth and are age 24 or younger. If the household is not, this field will be populated with a "N/A".

Chronically Homeless: if a client or a client's head of household is considered chronically homeless, this field will populate with a "Yes". Otherwise, the field will populate with a "No". To review which clients are chronically homeless, and which are chronically homeless by association (their head of household is considered chronically homeless), review the APR-ESG & DQ Detail Export. Instructions for running this report can be found at: http://www.philadelphiaofficeofhomelessservices.org/about-us/hmis/

Move-In Date: (for Permanent Housing and Rapid Rehousing projects only) the date that the head of household moved into housing. Only the head of household is required to have a move-in date. This can be the same date as the enroll date, if the client moves into housing on the same day they enroll in the project. If the household moves into a unit a week after starting with the project, then the move-in date should be one week after the enroll date.

> HUD's Definition of the housing **Move-In Date**:
>
> The date that a household admitted into a Permanent Housing or Rapid Rehousing project moves into housing.[1] This means a lease arrangement has been made, the client has a key or the ability to enter the unit and that the client has physically slept in the unit.[2]

[1] U.S. Department of Housing and Urban Development (2017). *HMIS Data Standards Manual.* Page 55.
[2] U.S. Department of Housing and Urban Development (2017). *Continuum of Care (CoC) HMIS Program Manual.* Page 121.

Engagement Date: (All Street Outreach and all PATH funded projects) the date on which an interactive client relationship leads to a client assessment or opening a case plan.

Date of Determination: (PATH funded projects only) the date of PATH Status determination. All other project types should ignore this field.

Federally Enrolled: identifies if the client is enrolled in a project that is funded by a federal program such as PATH or RHY. Participants of projects funded by CoC or ESG funds are not included in this category.

Runaway Youth: (for RHY funded projects only) identifies if the client is considered a runaway homeless youth.

Entry Cash Income: the total cash income reported in the most recent assessment completed, regardless of the reporting period. For example, if an annual assessment is completed on 6/18/2018 and the selected reporting period is 4/1/2017 to 3/31/2018, the reported cash income will be pulled from the most recent assessment, which is from the annual assessment on 6/18/2018.

VA Medical: this field will be populated with a "Yes" if the client was identified as receiving Veteran's Administration (VA) Medical Services as a health insurance type in the most recent assessment that was completed.

Enrollment Number: identifies and orders the number of times this client has enrolled. This field mainly pertains to clients with multiple enrollments into the project during the reporting period. For most clients, this will be reported as a 1, but for clients who re-entered the project, their second entry will be reported as a 2, their third entry as 3, and so on.

If a client has more than one entry assessment completed for a project that they entered only once, then there will be two different Enrollment Numbers, but the Enroll ID will be the same for both records. For every enrollment, there should be a unique Enroll ID. To correct this, please reach out to a System Performance Analyst. Their contact information is provided at the end of this guide.

Days Enrolled in Reporting Period: this field calculates the total number of days the client was enrolled in the project during the reporting period. For example, if client A was in a program for one year (1/1/2016 to 12/31/2016) and the reporting period was just for the month of August (8/1/2016 to 8/31/2016), then client A's "days enrolled in reporting period" would be 31.

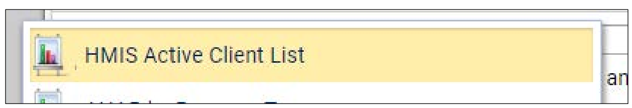
Total Days Enrolled in Project: this field calculates the client's total length of stay in the project, as of the end of the reporting period. If client A was in a program for one year (1/1/2016 to 12/31/2016) and the reporting period was for just the month of August (8/1/2016 to 8/31/2016), the "total days enrolled in project" would show as 243 days, because as of 8/31/2016, that is how many total days the client was enrolled in the project.

Instructions for Locating, Running and Saving the Active Client List Report

Locating the HMIS Active Client List report:

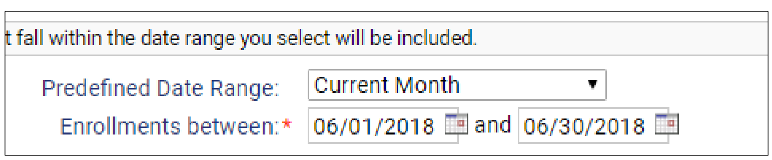
1. From the **HOME** workspace, click on **HMIS Reports** on the menu on the left side of the screen.

2. Hover your mouse over the **HUD/HMIS Reports** folder, and then select the **HMIS Active Client List**.



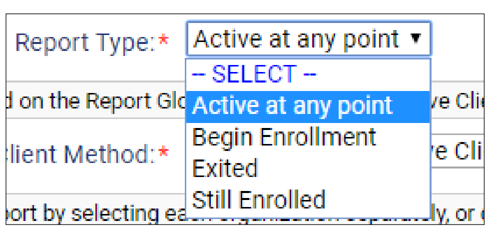
Setting the Report Parameters:

1. Select the Date Range to use for the report. You can either select a date range using the **Predefined Date Range** drop-down menu, or entering custom dates in the **Enrollments between** fields.



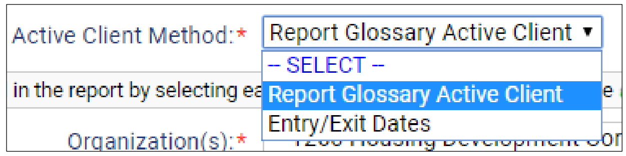
   The first date box is the beginning date, and the second date box is the ending date. For example, entering 06/01/2018 and 06/30/2018 in the respective fields will render data for that reporting period.

2. Set the **Report Type** to *Active at any point*.



   Selecting *Active at any point* will pull all the clients served in the project during the reporting period. To view only the clients who entered the project during the reporting period, select *Begin Enrollment*, or for only those who exited, select *Exited.*

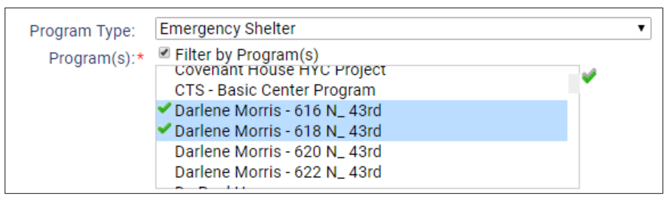
3. Set the **Active Client Method** to *Report Glossary Active Client.*



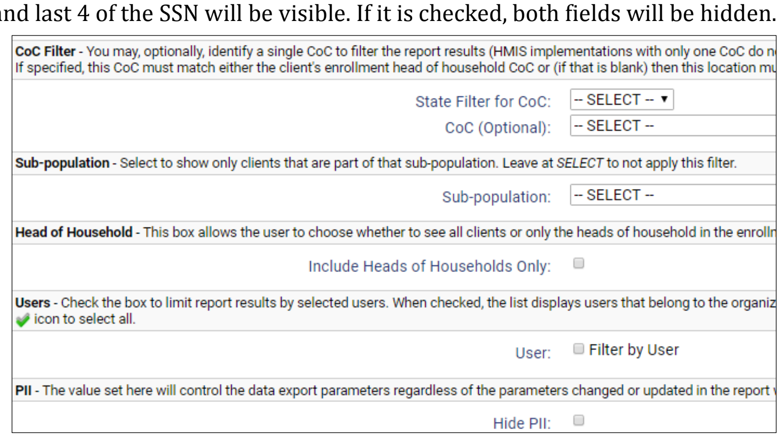
- The *Report Glossary Active Client* determines if a client is active based on their enrollment and exit dates, unless the project is a night-by-night shelter, street outreach, or a services-only project. Such projects will have additional filters applied to determine if the client is active.
- The *Entry/Exit Dates* will only include a client as active based on the client's enrollment entry and exit dates. No additional filters are applied based on project type.

4. The **Organization** will default to your organization.

5. Select the program(s) to include in the report.

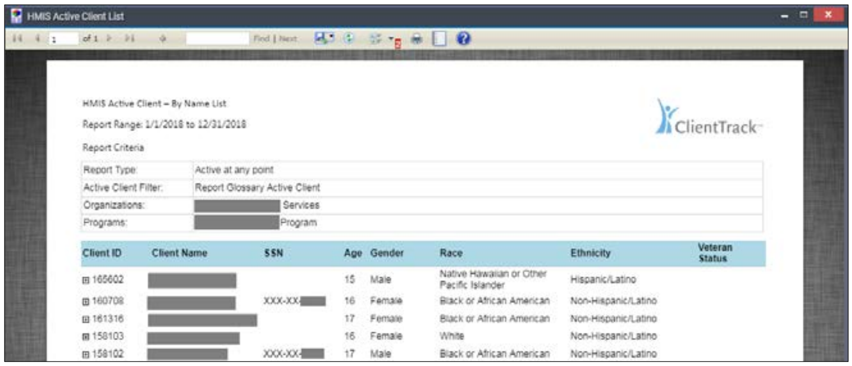


6. ***Optional*** Filters. These filters do not need to be selected, but are defined below.
   - CoC Filter: If selected, this filter will only include the location chosen in the entry assessment from the Head of Household.
   - Sub-population: This filter can be used to identify specify populations, such as veteran, chronically homeless (client must be identified as chronic at entry), youth only households (households in which no client is age 25 or older), or adults with children only (any household with one client under and one client over the age of 18).
   - Head of Household: Checking the *Include Heads of Households Only* box will remove any client from the report who is not identified as the head of household.
   - Users: This filter can be used to view clients assigned to a selected Case Manager(s). Check the box next to *Filter by User* and a list of the case managers in your organization will appear. Select the case managers (s) from the box that appears, just as the program(s) were selected in step 5.
   - PII: This filter affects how the client name and SSN will appear in the report. If the *Hide PII* box is unchecked, the client name and last 4 of the SSN will be visible. If it is checked, both fields will be hidden.



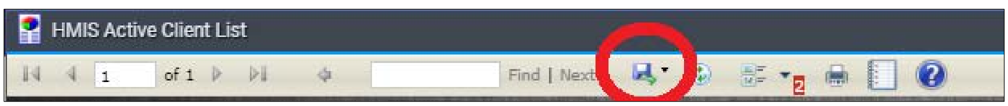
7. To create the report, click on the Report button on the bottom right side of the screen.

8. The report will pop-up on the screen, as seen below. To view client details, click the small "+" sign the left of the participant's Client ID number.

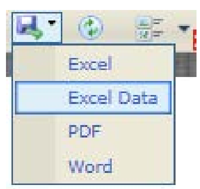


To Save the Report:

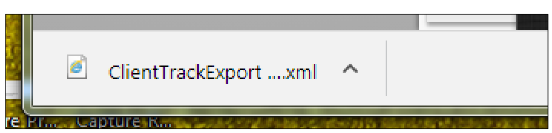
1. To save the report, click on the save icon at the top of the report.



2. For a PDF version of the report, select *PDF* from the drop down menu. For an Excel version that will list all the data to review and analyze, select *Excel Data.*



3. After selecting *Excel Data*, the report will automatically download. You can open the report by going to your Downloads folder and selecting the most recent file, or by clicking on the file that just appeared in the lower left corner of the screen, as seen below.



If you have any questions about the data in your report, please contact one of the following System Performance Analysts: Angela Foreman (**Angela.Foreman@phila.gov**), or Melanie Haake (**Melanie.Haake@phila.gov**).