

Client Counts Report

HMIS Dashboard Report



NC COALITION to
HOMELESSNESS end

Presentation Agenda

By the end, attendees will be able to:

- ✓ Report Name Selections
- ✓ Available Filters
- ✓ How to best utilize this report for your needs
- ✓ Additional Resources





Using the Report

What Does This Report Do?

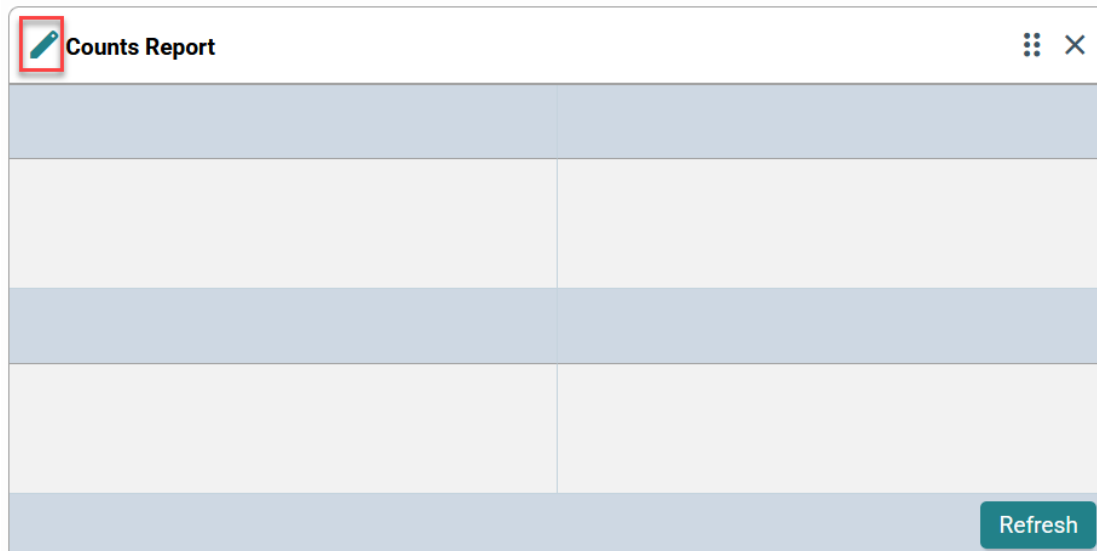
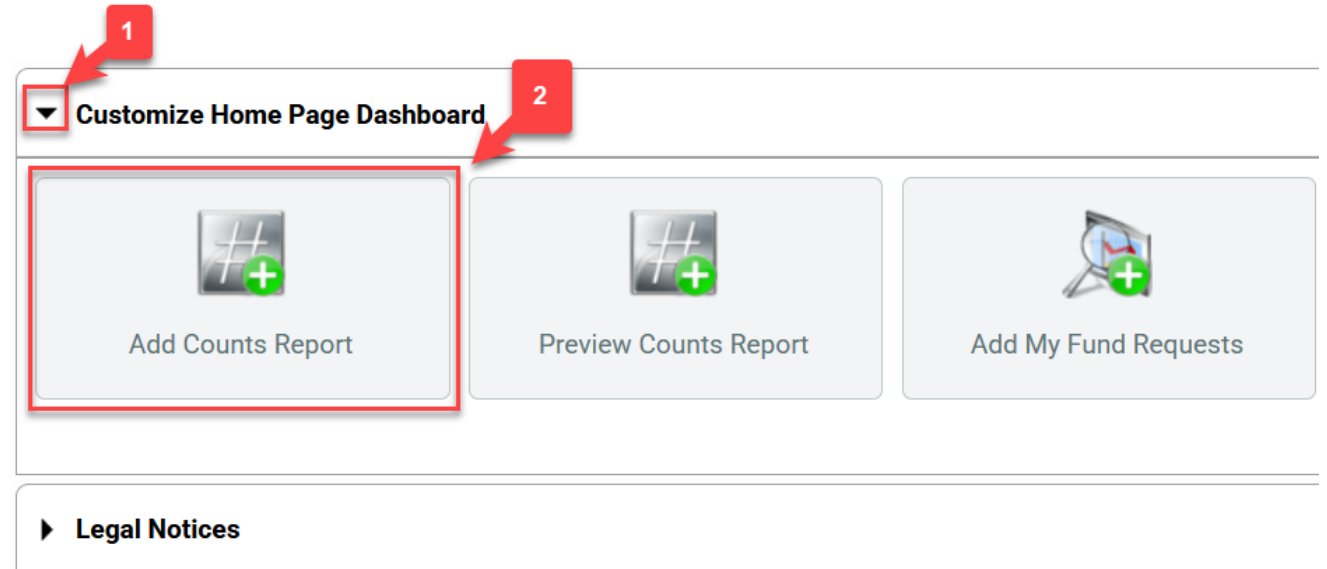
Provides a list of clients who meet the criteria identified in the report as well as quick access to the client profile.

- Available to all HMIS users
- 4 reports can be selected at a time
- EDA Sensitive
- Updates information in real time

Adding the Dashlet to your Home Page

Reporting Path:

Customize Home Page
Dashboard > Add Counts
Report



- 4 available reporting quadrants
- Click on the Edit Pencil button to select reporting criteria

Editing the Dashlet

- Report Name
- Description
- Filters
 - Select Dates
 - Provider Type
 - Provider
 - Including Subordinates

Edit Dashlet ✕

Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	Clients With An Entry But No Exit ▼		
Description	Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date		
Filters			
Select Dates		Start Date	End Date
All Dates ▼		<input type="text"/>	<input type="text"/>
Provider Type *	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group		
Provider *	North Carolina Coalition to End Homelessness (2)		<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Including Subordinates	<input checked="" type="checkbox"/>		

Once you've made your changes to the count quadrants, click Save at the top of the Home Page

Home > Home Page Dashboard Type here for Global Search 🔔 ★ ?

i You have modified your Home Page Dashboard. Click Save to save your changes or Undo Changes to undo all modifications.

System News (48) **Agency News (0)** **Follow Up List (0)**

Useful Report Names



Clients With An Entry But No Exit

Clients with entries under a specific provider and date range but no exit date



Clients with Expiring ROI's

List of clients with ROI's expiring within the selected reporting date

*Not filtered by Entries/Exits



Incoming Referrals

Lists all referrals made TO the specified provider during the specified date range

*Time frame should be set to "This Week" as referral numbers do not decrease



Client List View and Export

- Selecting the number of any Counts report to pull a list of clients meeting the criteria
- Client ID's are links to the client profile
- Click “Download Full Report” to download an excel list of clients

Count Details ×

Clients With An Entry But No Exit

Client ID	Last Name	First Name	Middle Name	Suffix	Soc Sec No	Alias	Date of Birth	Gender	Number Of Entries
1060488					***-**-			Man (Boy, if child)	1
1060490					***-**-			Man (Boy, if child)	1
1043434					***-**-			Woman (Girl, if child)	1
1049839									1
1063677					***-**-			Woman (Girl, if child)	1
359902					***-**-			Man (Boy, if child)	2

[Download Full Report](#) Showing 12796-12808 of 12808 [First](#) [Previous](#) [Next](#) [Last](#)

[Counts Report](#)

Clients With An Entry But No Exit:

12799



Report walkthrough
Follow along!

How to Best Utilize the Report



QUICK DATA
QUALITY CHECKS



CLIENT PROGRESS
UPDATES



CASE MANAGER
ACTIVITY



UTILIZATION
RATES

[Customizing Your HMIS Home Dashboard: Counts Report](#) ZenGuide
Article

Similar Reports Available

CoC APR/ESG CAPER:

- Project performance & Impact on overall system performance

Clients Served Report:

- Details who and how clients are served

EVA – Client Counts Report:

- Shows status of clients within projects within a date range such as exits and how many days current clients are enrolled





Questions?