



# Sonoma County: Data Management

# Welcome!

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# Agenda

PARTICIPANT DATA

TOUCHPOINT DATA

USER DATA

DATA QUALITY

DATA PULLS

DATA VALIDATION

HUD REPORTS

MANAGING REPORTS



# Learning Objective

To review tools in ETO that allow you to access your data and pull reports from your site.



# Standard Reports

Standard Reports

300 standard reports in ETO

Custom Reports

Query Wizard

ETO Results





# Standard Reports

## Standard Reports

- Demographic Data
- Participant Data
- TouchPoint Data
- Users Data
- Data Quality
- Managing Reports

# Participant Data



# Participant Data

In this section we will review the best reports for pulling Participant data, when to use them, and steps to access them.





# Participant Data

## Common Challenges for pulling Participant data

- Viewing current Caseloads
- Viewing enrollment, active & dismissed numbers
- Viewing historical data entry

## Best Reports to Address Challenges

- Current Caseloads Report
- Enrollments & Dismissals Report
- Participant Referral History
- Review Participant Efforts (New)

# Participant Data

## Enrollments & Dismissals

View Reports (NEW) > Enrollments & Dismissals

Purpose: To view total number of participants within a date range

### Enrollments and Dismissals

Information for all enrollments and dismissals in a date range.

Site Name: ETO Admin HOL

Summary for ETO Admin HOL for 1/1/15 through 12/6/19

#### Enrolled Participants

Number of Participant Enrollments in the Date Range (with duplicates):

Number of Unduplicated Participants Enrolled in the Date Range:

Number of Unduplicated Participants Enrolled in the Date Range and Active (as of today's date):

#### Active Participants

Number of Active Participants in the Date Range (with duplicates):

Number of Unduplicated Active Participants in the Date Range:

#### Dismissed Participants

Number of Dismissed Participants in the Date Range (with duplicates):

Number of Unduplicated Dismissed Participants in the Date Range:

Number of Unduplicated Participants Enrolled before the Start of the Date Range and Dismissed within the Date Range:

Number of Unduplicated Participants Enrolled and Dismissed with "Successful Program" Selected:  
Number of Duplicated Dismissals in the Date Range where "Successful Program" was Selected:

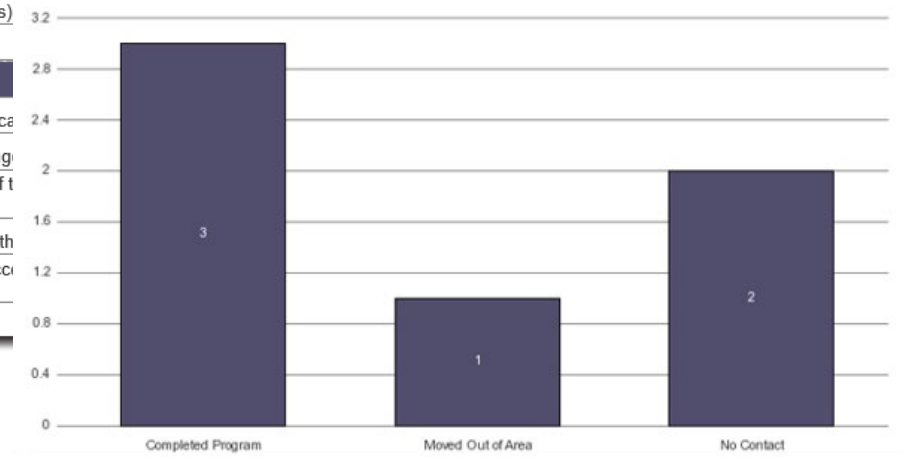
[Click for Reasons for Dismissal Details](#)

### Reason for Dismissal Details

Details of Reasons for Dismissal for 1/1/16 - 8/14/16

Site Name: ETO Admin HOL

Program Name: Case Management



Social Solutions  
transforming human services

# Participant Data

## Current Caseload Report

View Reports (NEW) > Caseload Reports > Current Caseload Report



Purpose: To view a list of caseworkers & their Participants assigned to them & participants who have not been assigned to a caseload.

### Current Caseloads

Current caseload assignments for all selected sites, programs, and user accounts

#### Adams, Sharon

Total number of participants on caseload as of 12/6/19: 5

Participant Site ID	Name	Site Name	Program Name	Program Start Date	Days in Program	Caseload Start Date	Days on Caseload	Date of Last Contact
10732	Leery, Dawson	ETO Admin HOL	Case Management	10/23/17	774	11/20/17	746	3/13/19
10774	Durant, Earl	ETO Admin HOL	Case Management	11/9/17	757	5/21/18	564	
10834	Fake, Chuck	ETO Admin HOL	Case Management	4/29/18	586	5/21/18	564	7/15/19
10835	Peralta, Jake	ETO Admin HOL	Case Management	5/11/18	574	5/11/18	574	3/13/19
10876	Getty, Estelle	ETO Admin HOL	Case Management	8/17/18	476	8/17/18	476	3/13/19

#### Casemanager, Jamie

Total number of participants on caseload as of 12/6/19: 10

Participant Site ID	Name	Site Name	Program Name	Program Start Date	Days in Program	Caseload Start Date	Days on Caseload	Date of Last Contact
10742	Adkins, Yolanda	ETO Admin HOL	Case Management	11/20/17	1,000	11/20/17	999	12/6/19
10761	Fake, Morgan	ETO Admin HOL	Case Management	11/20/17	1,000	11/20/17	999	12/6/19
10762	Davidson, Jenny	ETO Admin HOL	Case Management	11/20/17	1,000	11/20/17	999	12/6/19

### Current Caseloads

Participants who are currently not assigned to a case worker for all selected sites and programs

#### Unassigned Participants

Total number of unassigned participants as of 8/14/16: 47

Participant Site ID	Name	Site Name	Program Enrollment	Program Start Date	Days in Program	Last Caseload End Date	Days Unassigned	Date of Last Contact
2,799	Abate, Samuel	ETO Admin HOL	Case Management	6/20/16	55			
2,824	Arguelles, Cleotilde	ETO Admin HOL	Case Management	3/15/16	152			8/10/16
2,825	Arguelles, Elodia	ETO Admin HOL	Case Management	3/15/16	152			8/10/16
2,826	Arguelles, Jeffrey	ETO Admin HOL	Case Management	3/15/16	152			8/10/16
2,800	Barnette, Jayna	ETO Admin HOL	Case Management	7/20/16	25			
2,801	Barnette, Rolando	ETO Admin HOL	Case Management	3/20/16	147			



# Participant Data

## Participant Referral History

View Reports (NEW) > Referrals Reports > Participant Referral History

Purpose: To view the following referral information for a participant within a date range.

### Participant Referral History



All referrals submitted between: 1/1/2015 - 12/6/2019

#### Current Placements

This table provides details on the participant's current program enrollments.

Program Name	Enrollment Date	Days in Program	Program Services Provided
Alerts- User 2	8/2/17	856	
Children's Program	5/30/17	920	Counseling Group
			Counseling One on One
			Group counseling AI
			maternity Care

#### Referral History

This table summarizes the status of each referral made for the participant within the date range.

Referral Form	Sending Program	Sending Site	Outbound User Sending the Referral	Referral Date	Original Target Provider	Redirected Target Provider	Inbound User Acting on Referral	Date Last Updated	Referral Status	Days Between Referral Date and Enrollment

# Participant Data

Review Participant Efforts

Participant History > Review Participant Efforts (NEW)

Purpose: To view details regarding TouchPoint data entry, attendance, & referrals in a date range.

Detailed Statistics	
TouchPoints	
Name	
+ Client Contact	
+ Goal Plan (Case Management)	
- Initial Needs Assessment (Case Management)	
Date Completed	Date Last Updated
2/13/2016	8/14/2016

Review Participant Efforts (NEW)			
Back	View/Edit Participant	View Participant TouchPoints	Participant Dashboard
Participant Information			
Participant:	Aquino, Aaliyah		
Case Number:	11189		
Site:	ETO Admin HOL		
Period:	1/1/2015 - 12/6/2019		
Program(s):	Food Pantry, HOL Instructor Program		
Overall Statistics			
Number of Point of Service Elements:	0		
Number of Efforts:	0		
Total Time Spent (hh:mm):	0:00		
Attendance:	0		
Total Events Attended:	0		
Total Events Scheduled:	0		
Total Time Spent (hh:mm) (If applicable):	0:00		
Attendance %:	0.00%		

# TouchPoint Data



# TouchPoint Data

In this section we will review the best reports for pulling TouchPoint data, when to use them, and steps to access them.



# TouchPoint Data

## Common Challenges for pulling TouchPoint data

- Printing & viewing TouchPoints for a single participant
- Viewing average responses and statistical data for TouchPoint questions
- Viewing responses for all questions and all participants in specific TouchPoint
- Viewing Collection details

## Best Reports to Address Challenges

- TouchPoint Response Report
- TouchPoint Aggregate Response Report
- TouchPoint Flat File
- Collections Flat File





# TouchPoint Data

TouchPoint Response Report

View Reports (NEW) > TouchPoint Response Report

Purpose: To view & print responses to TouchPoint questions for a single participant.

## Response Report

Individual subjects responses to the selected TouchPoint, showing all questions and responses

Report Date Range: 1/1/16 - 8/14/16

SiteName: ETO Admin HOL

Program Name: Case Management

TouchPoint(s): Goal Plan (Case Management)

Subject Name: Hungate, Cassandra

Date Taken	Recorded By	Recorded on Behalf of
3/1/16	Bradford, Kevin	
Question	Answer	
Goal Category	Employment	
Goal:	Secure Stable Employment	
Goal Objectives (Action Steps)	Complete job readiness training program write up a new resume Obtain at least 3 personal references apply for and secure employment	
Goal Target Completion Date	8/31/16	
Goal Status	Started/In Progress	
By signing below I assume responsibility of the necessary actions I must take outlined in the above 'Objectives' field and understand that I alone am responsible for achieving my goals.	Hungate, Cassandra	



# TouchPoint Data

TouchPoint Aggregate Response

View Reports (New) > TouchPoint Aggregate Response

Purpose: To view a total number of the responses to a TouchPoint within a date range.

## TouchPoint - Aggregate Responses

Aggregate responses for the selected TouchPoint  
Report Date Range: 1/1/15 - 12/6/19

**Site Name: ABC Assistance Delaware**

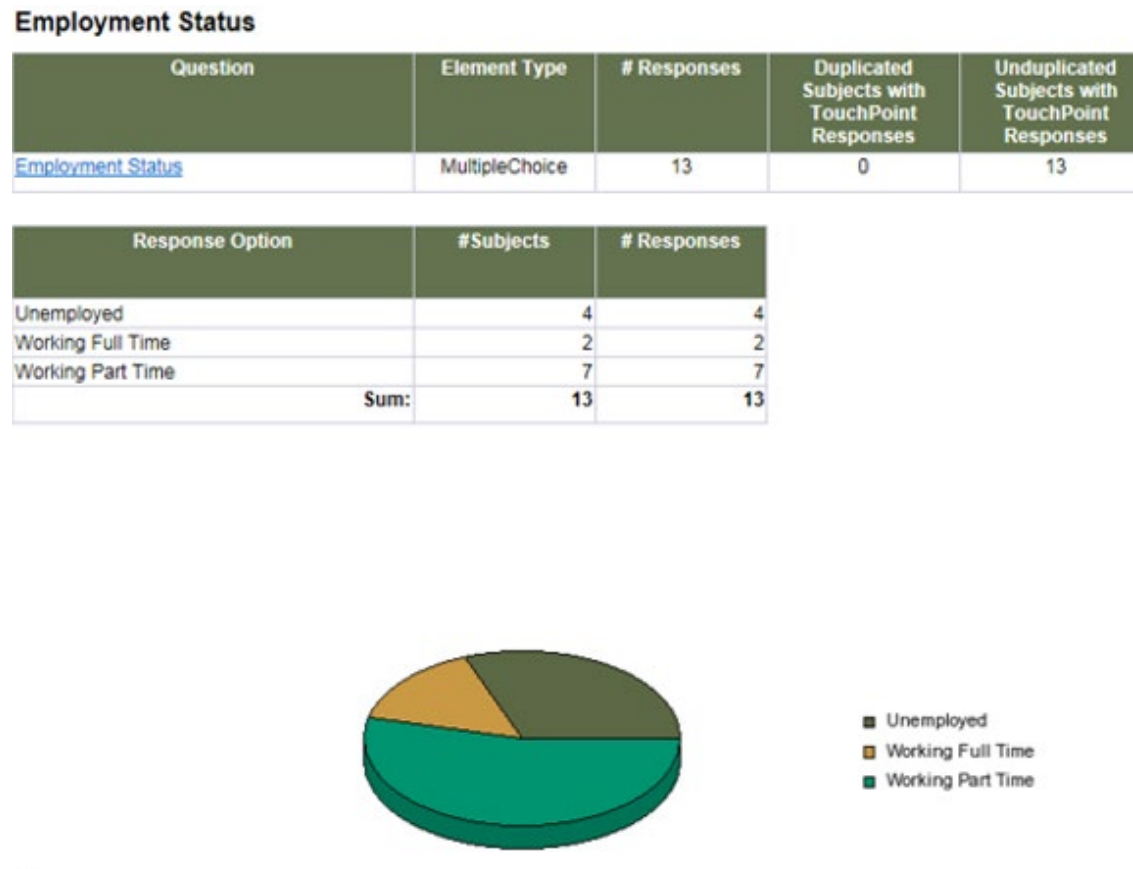
Program Name: Intake

TouchPoint Name	# Responses	Duplicated Subjects with TouchPoint Responses	Unduplicated Subjects with TouchPoint Responses
<a href="#">School Engagement Scale</a>	4	0	4

# TouchPoint Data

TouchPoint Aggregate Response

View Reports (New) > TouchPoint Aggregate Response





# TouchPoint Data

TouchPoint Flat File

View Reports (NEW) > TouchPoint Flat File

Purpose: To view a table of TouchPoint responses within the ETO interface.

The Flat File include the option to:

- Filter results
- Export to Excel, PDF or CSV.

**TouchPoint Flat File**

Select a TouchPoint to Review: -- Select --

Select Dates for Review:

Begin Date: 8/2/2016

End Date: 8/9/2016

This | Previous Month  
This | Previous Quarter  
Year To Date

Check ALL Dates

Submit



# TouchPoint Data

## TouchPoint Flat File

View Reports (NEW) > TouchPoint Flat File

TouchPoint Name	Subject Type	Subject Name	SubjectID	Site	Program	Response Date	Recorded By	Pre or Post test?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
School Engagement Scale	Participant	Santiago, Amy	2953	ETO Admin HOL	Val's Afterschool Program	1/30/2019	Enterprise Manager Tester	Pre Test
School Engagement Scale	Participant	Fake, Erin	2969	ETO Admin HOL	Children's Program	3/18/2019	Enterprise Manager Tester	Pre Test
School Engagement Scale	Participant	Geller, Monica	2766	ETO Admin HOL	Services Program	12/6/2018	Enterprise Manager Tester	Pre Test



# TouchPoint Data

## Collection Flat File

View Reports (NEW) > TouchPoint Reports > Collection Flat File

Collection Data: Collection Flat File

Purpose: To view a table of Collection responses within the ETO interface.

The Flat File include the option to:

- Filter results
- Export to Excel, PDF or CSV.

**Collection Flat File**

Select a Collection Type to Review: -- Select --

Select Dates for Review:

Begin Date: 11/29/2019

End Date: 12/6/2019

[This](#) | [Previous Month](#)  
[This](#) | [Previous Quarter](#)  
[Year To Date](#)

Check ALL Dates

**Submit**



# TouchPoint Data

## Collection Flat File

View Reports (NEW) > TouchPoint Reports > Collection Flat File

Collection Name	Response ID	Collection Type	Subject Type	Subject Name	SubjectID	Site	Program	Response Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Baking for Kids	1	After School Program 2018	Participant	Cobb, Jules	2886	ETO Admin HOL	HOL Instructor Program	10/25/2018
Baking for Kids	7	After School Program 2018	Participant	Jones, Melissa	2626	ETO Admin HOL	HOL Instructor Program	10/25/2018
Baking for Kids	2	After School Program 2018	Participant	Fake, Jennifer	2776	ETO Admin HOL	HOL Instructor Program	10/25/2018
Baking for Kids	3	After School Program 2018	Participant	Fake, Amber	2775	ETO Admin HOL	HOL Instructor Program	10/25/2018

# User Data





# User Data

In this section we will review the best reports for pulling User data, when to use them, and steps to access them.



# User Data

## Common Challenges for pulling User data

- Viewing user roles & access
- Identifying how many User accounts you have per program
- Viewing log in details
- Viewing staff Data Entry

## Best Reports to Address Challenges

- User Account Details Report
- Review Staff Efforts Feature

# User Data

## User Account Details

View Reports (New) > Management Reports > User Account Details

Purpose: View the number of accounts per program & user details



### User Account Details

Returns aggregate user account details across the enterprise by a given site

#### Summary

Total # Sites	Total # Programs	Total # User Accounts
1	1	6
Site Name	Program Name	# User Accounts Per Program
After School Program	Science Club	6



### User Account Details

Returns user account details across enterprise by site

#### Site Name: After School Program

Name	User Role	Reporting Role	Last Login Date	Disabled	Program Name	Caseload Enforced
<a href="#">Solutions, Inc., Social</a>	Developer	<Default>	11/30/15	No	Science Club	No
<a href="#">Weber, Brandon</a>	Developer	<Default>	12/1/15	No	Science Club	No
<a href="#">Maschi, Kristopher</a>	Enterprise Manager	<Default>	11/20/15	No	Science Club	No
<a href="#">Manager, Portal</a>	Site Manager	<Default>	10/21/15	No	Science Club	No
<a href="#">Black, Frank</a>	Enterprise Manager	<Default>	11/20/15	No	Science Club	No

Total User Accounts: 5

Total Programs: 1

# User Data

Review Staff Efforts (NEW)

Program Administration > Review Staff Efforts (NEW)

Purpose: View user's data entry within a date range.

Select Details to View:  Select All Details

	Participants	Entities	General	Other Types of Work		
Point of Service Elements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Employment	<input type="checkbox"/> Referrals	<input type="checkbox"/> Assessments
Composite Point of Service Elements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Education	<input type="checkbox"/> Processes	<input type="checkbox"/> Legal Case History
Multiple/Group Efforts	<input type="checkbox"/>	<input type="checkbox"/>	N/A			
Composite Group/Family Efforts	<input type="checkbox"/>	N/A	N/A			

Summary Statistics		
	Program Summary HOL Instructor Program	Site Summary ETO Admin HOL
<b>Number Of Participant Point of Service Elements:</b>	0	0
<b>Number Of Efforts:</b>	0	0
<b>Total Time Spent (hh:mm):</b>	00:00	00:00
<b>Number Of Entity Point of Service Elements:</b>	0	0
<b>Number Of Efforts:</b>	0	0
<b>Total Time Spent (hh:mm):</b>	00:00	00:00
<b>Number Of General Point of Service Elements:</b>	0	0
<b>Number Of Efforts:</b>	0	0
<b>Total Time Spent (hh:mm):</b>	00:00	00:00
<b>Employment Placements:</b>	0	0
<b>Education Placements:</b>	0	0
<b>Referrals:</b>	0	0
<b>Assessments Completed/Updated:</b>	N/A	0

# Data Quality



# Data Quality

In this section we will review the best reports for run data quality, when to use them, and steps to access them.



# Data Quality

## Common Challenges for pulling Data quality

- Duplicated Participant records
- TouchPoints not being submitted

## Best Reports to Address Challenges

- TouchPoint Submission Report



# Data Quality

TouchPoint Submission Report

View Reports (New) > TouchPoint Submissions Report

Purpose: To view a list of possible duplicate participants based on the site's duplicate check settings

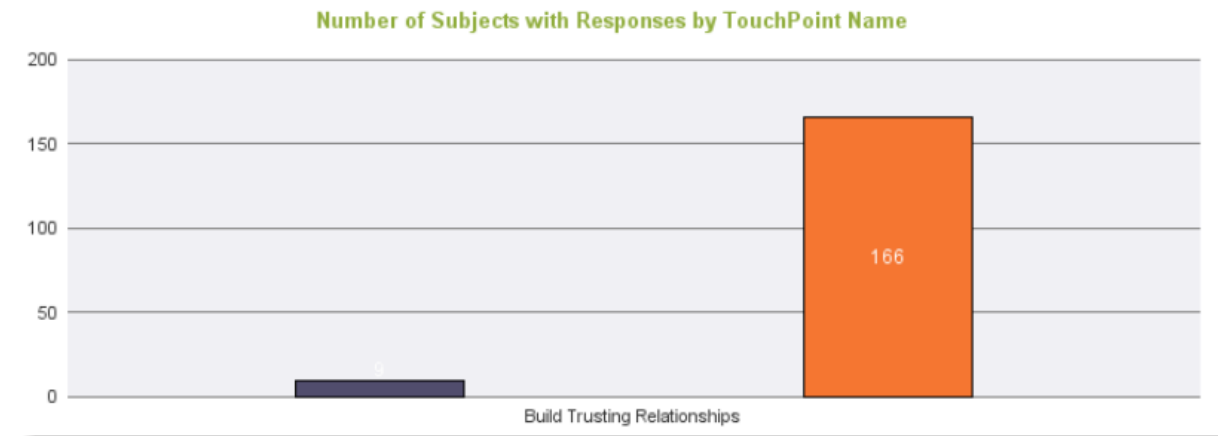
## TouchPoint - Submission Report (Participant)

Completion Rates

Report Date Range: 1/1/15 - 12/10/19

Site Name: ETO Admin HOL

Program Name: Alerts





# Data Quality

## TouchPoint Submission Report Continued

View Reports (New) > TouchPoint Submissions Report

### TouchPoint - Submission Report (Participant)

Completion Details

Report Date Range: 1/1/15 - 12/10/19

Site Name: ETO Admin HOL

Program Name: Alerts



TouchPoint Name	# of Subjects with Responses	Total # of Responses	# Subjects with No Responses
Build Trusting Relationships	<a href="#">9</a>	11	<a href="#">127</a>

### TouchPoint - Submission Report (Participant)

Participants Without Responses

Report Date Range: 1/1/15 - 12/10/19

Site Name: ETO Admin HOL

Program Name: Alerts

#### Build Trusting Relationships

Subject Name	Program Start Date
Alerts, Issue	1/26/18
Alerty, Alert Val	5/22/18
Bedelia, Amelia	3/13/18
Davenport, Marcus	11/9/17

# HMIS Data Pulls



# HMIS Data Pulls

In this section we will review HMIS Data Pulls, when to use them, and steps to access them.

# HMIS Data Pulls

Reports > HMIS Data Pulls & APR

Purpose: Helps software to know what data and which date range to pull

Search Term(s)... Within Participants In Sono - COTS, ES MIC - Singles SEARCH

Manage HMIS Data Pulls

Create Data Pull Run Validation HMIS Data Validations Go To Reporting Site

Export ID	Description	Version	Hash Status	Included	Requested On	Requested By	Refresh automatically?	Date Completed	Take Action
7028	COTS Site, 1/1/2019 - 12/31/2019 ✓	2020 (v1.5 csv)	Unhashed (Standard CSV)	Non-Readable CSV	1/23/2020 8:34:33 PM	Daniel Overbury-Howland	<input type="checkbox"/>	1/23/2020	<a href="#">Open</a> <a href="#">Download</a> <a href="#">Reporting</a> <a href="#">Delete</a>

# HMIS Data Pulls

Step 1: Select “Create Data Pull”

Search Term(s) ... Within Participants In Sono - COTS, ES MIC - Singles SEARCH

**Manage HMIS Data Pulls**

Create Data Pull Run Validation HMIS Data Validations Go To Reporting Site

Export ID	Description	Version	Hash Status	Included	Requested On	Requested By	Refresh automatically?	Date Completed	Take Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	
7028	COTS Site, 1/1/2019 - 12/31/2019 ✓	2020 (v1.5 csv)	Unhashed (Standard CSV)	Non-Readable CSV	1/23/2020 8:34:33 PM	Daniel Overbury-Howland		1/23/2020	<a href="#">Open</a> <a href="#">Download</a> <a href="#">Reporting</a> <a href="#">Delete</a>

# HMIS Data Pulls

Step 2: Select a Hash Status, Scope and Grant Start/End Date

Step 3: Click Submit, to start the process

**Create HMIS Data Pull**

Please select the scope, a date range, the files types you would like included and notification options. You may also elect to have this data pull automatically refreshed based off of a schedule. ?

HUD Version: 2020 (v1.5 csv) ▼

Hash Status: Unhashed (Standard CSV) ▼

Scope: -- Select a Scope --  
This Program  
This Site  
A Program Group  
Whole Enterprise

Grant Start Date:

Grant End Date:

Include Readable CSV's:

Notify upon completion:

Refresh automatically:



# HMIS Data Pulls

Step 4: Open the data pull once the check mark is in the description

Search Term(s) ... Within Participants In Sono - COTS, ES MIC - Singles SEARCH

Manage HMIS Data Pulls

Create Data Pull Run Validation HMIS Data Validations Go To Reporting Site

Export ID	Description	Version	Hash Status	Included	Requested On	Requested By	Refresh automatically?	Date Completed	Take Action
							<input type="checkbox"/>		
7028	COTS Site, 1/1/2019 - 12/31/2019	2020 (v1.5 csv) ✓	Unhashed (Standard CSV)	Non-Readable CSV	1/23/2020 8:34:33 PM	Daniel Overbury-Howland		1/23/2020	<a href="#">Open</a> <a href="#">Download</a> <a href="#">Reporting</a> <a href="#">Delete</a>

# Data Validation





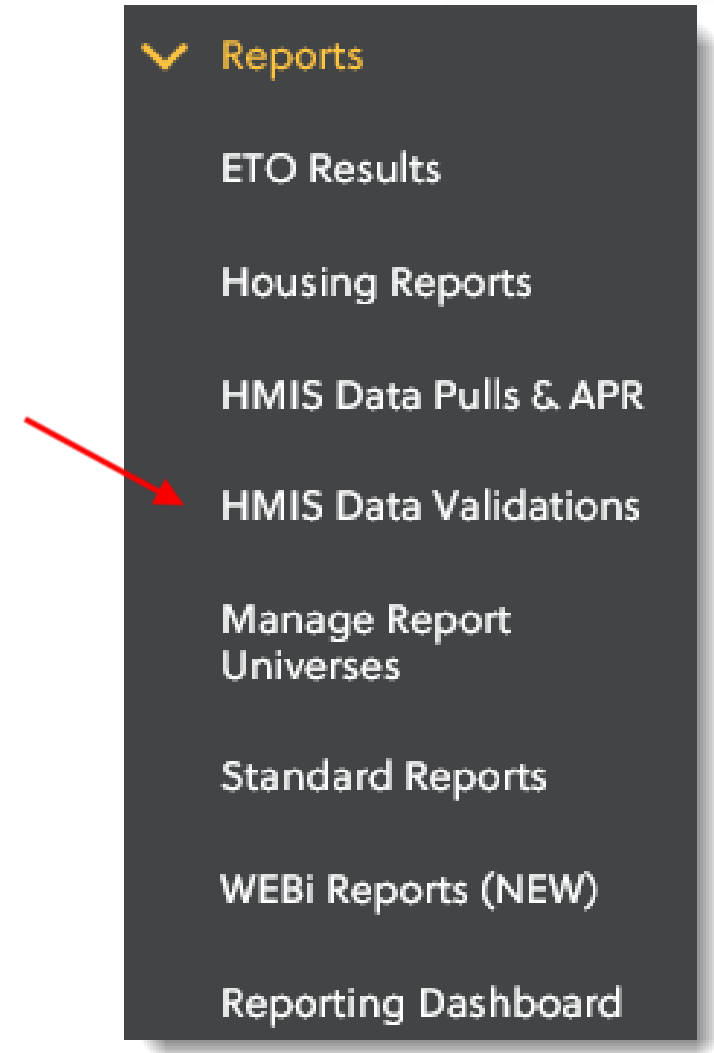
# Data Validation

In this section we will review Data Validation, when to use them, and steps to access them.



# Data Validation

Accessing HMIS Data Validations  
Reports > HMIS Data Validations



# Data Validation

Purpose: To check the ETO data against HUD's data collection requirements and flag any problems

Search Term(s)...

Within Participants In Sono - COTS, ES MIC - Singles SEARCH

Manage HMIS Data Validations

Run Validation Create Data Pull HMIS Data Pulls & APR

Validation ID	Description	Version	Requested By	Date Completed	Take Action
3349	Sono - COTS, RRH RP Program, 7/1/2019 - 2/11/2020	2020 (v1.5 csv)	Carmen Razo-Clark	2/11/2020	<a href="#">Open</a> <a href="#">Report</a> <a href="#">Delete</a>

# Data Validation

Step 1: Select “Run Validation”

Search Term(s) ... Within Participants In Sono - COTS, ES MIC - Singles SEARCH

Manage HMIS Data Validations

Run Validation Create Data Pull HMIS Data Pulls & APR

Validation ID	Description	Version	Requested By	Date Completed	Take Action
3349	Sono – COTS, RRH RP Program, 7/1/2019 - 2/11/2020	2020 (v1.5 csv)	Carmen Razo-Clark	2/11/2020	<a href="#">Open</a> <a href="#">Report</a> <a href="#">Delete</a>



# Data Validation

Step 2: Select a Hash Status, Scope and Grant Start/End Date

Step 3: Click Submit, to start the process

**Create Validation Report**

Please select scope and a date range. ?

HUD Version: 2020 (v1.5 csv) ▾

Hash Status: Unhashed (Standard CSV) ▾

Scope: -- Select a Scope --  
This Program  
This Site  
A Program Group  
Whole Enterprise

Grant Start Date:

Grant End Date:

Cancel Submit

# Data Validation

Step 4: Open the data validation once the check mark is in the description

Search Term(s)...

Within Participants In Sono - COTS, ES MIC - Singles SEARCH

Manage HMIS Data Validations

Run Validation Create Data Pull HMIS Data Pulls & APR

Validation ID	Description	Version	Requested By	Date Completed	Take Action
3349	Sono - COTS, RRH RP Program, 7/1/2019 - 2/11/2020	2020 (v1.5 csv)	Carmen Razo-Clark	2/11/2020	<a href="#">Open</a> <a href="#">Report</a> <a href="#">Delete</a>

# HUD Reports



# HUD Reports

In this section we will review HUD Reports, when to use them, and steps to access them.





# HUD Reports

## Reports in HMIS

- Annual Performance Review (APR)
  - Provider level report
- Consolidated Annual performance and Evaluation Report
  - Used for organizations using ESG Grants
- Data Quality Report
  - Allows COCS and grantees to review demographic and HUD Assessment TouchPoint data
- System Performance Measures Report (SPM)
  - COC report that aggregates data



# HUD Reports

## Reports in HMIS

- Annual Performance Review (APR)
  - Provider level report
- Consolidated Annual performance and Evaluation Report
  - Used for organizations using ESG Grants
- Data Quality Report
  - Allows COCS and grantees to review demographic and HUD Assessment TouchPoint data
- System Performance Measures Report (SPM)
  - COC report that aggregates data



**COMPLETE AT LEAST  
ONE SUCCESSFUL HMIS  
DATA PULL**

**LIMITATION**





***CAN ONLY USE DATA  
PULLS THAT YOU  
CREATED UNDER YOUR  
USER WHEN RUNNING A  
REPORT***

***LIMITATION***



# HUD Reports

## Accessing HUD Reports

Reports > HMIS Data Pulls & APR > Go To Reporting Site

- ▼ Reports
  - ETO Results
  - Housing Reports
  - HMIS Data Pulls & APR
  - HMIS Data Validations
  - Manage Report Universes
  - Standard Reports
  - WEBi Reports (NEW)
  - Reporting Dashboard

Search Term(s)...

Within Participants In Sono - COTS, ES MIC - Singles SEARCH

**Manage HMIS Data Pulls**

Create Data Pull Run Validation HMIS Data Validations Go To Reporting Site

Export ID	Description	Version	Hash Status	Included	Requested On	Requested By	Refresh automatically?	Date Completed	Take Action
7028	COTS Site, 1/1/2019 - 12/31/2019	2020 (v1.5 csv)	Unhashed (Standard CSV)	Non-Readable CSV	1/23/2020 8:34:33 PM	Daniel Overbury-Howland	<input type="checkbox"/>	1/23/2020	<a href="#">Open</a> <a href="#">Download</a> <a href="#">Reporting</a> <a href="#">Delete</a>



# HUD Reports

Accessing HUD Reports

Reports > HMIS Data Pulls & APR > Go To Reporting Site

Reports

ALL REPORTS

Report Name	Created	Modified	Last Run	Action
HMIS				
LSA	January 21, 2020	January 21, 2020	January 21, 2020	
PATH	January 21, 2020	January 21, 2020	January 21, 2020	
HIC	January 21, 2020	January 21, 2020	January 21, 2020	
PIT	January 21, 2020	January 21, 2020	January 21, 2020	



# HUD Reports

## Running HUD Reports

Select the Data Pull and Report Start/End date

**Run report APR** \* Required

Select Data Pull \*

Report Start Date \*

Report End Date \*

The screenshot shows a form titled "Run report APR" with a "\* Required" label in the top right. It contains three input fields: "Select Data Pull \*" (a dropdown menu with a downward arrow icon), "Report Start Date \*" (a text box), and "Report End Date \*" (a text box). At the bottom right, there are two buttons: "CLOSE" and "RUN REPORT". Two red arrows point to the dropdown arrow icon and the "RUN REPORT" button.






# HUD Reports


Running HUD Reports

Checking Status of Report

ALL REPORTS RUN REPORT

## APR Run History

ETO APR Report 2019 1.1 on Wed Jan 29 2020 CREATED January 29, 2020 by Social Solutions, Inc. STATUS in progress	 
ETO APR Report 2019 1.1 on Wed Jan 29 2020 CREATED January 29, 2020 by Social Solutions, Inc. STATUS completed	










# HUD Reports

Running HUD Reports

Accessing the Report you ran

ALL REPORTS RUN REPORT

## APR Run History

ETO APR Report 2019 1.1 on Wed Jan 29 2020 CREATED January 29, 2020 by Social Solutions, Inc. STATUS in progress	 
ETO APR Report 2019 1.1 on Wed Jan 29 2020 CREATED January 29, 2020 by Social Solutions, Inc. STATUS completed	

*Note: A red arrow points from the 'STATUS in progress' text of the first row to the 'STATUS completed' text of the second row.*

# Manage Reports



# Manage Reports

Site managers and above can set security for the reports so that users can view reports in the system.



# Manage Reports

## Common Challenges

- Users cannot access reports
- Feeling overwhelmed due to the long list of reports on the View Reports page.
- Unsure of which reports to use.

## Best Practice to overcome:

- Create a Custom Rule

# Manage Reports

Site Administration > Manage Site Navigation

Create a Custom Rule for the Navigation Bar allowing staff to access View Reports (New).

Steps:

- Click the green 'Manage Rules' on the top right column
- Click Add New Rule
- Name the rule and select roles.

The screenshot displays the 'Manage Site Navigation' interface. At the top, there is a header bar with the text 'Manage Site Navigation'. Below this is a table with the following columns: 'Component', 'Feature', 'Default Rule', 'Show using default', 'Show using CxRules', and 'Manage Rules'. The 'Manage Rules' column contains the text 'Set status for all CxRules to'. A red arrow points to the 'Manage Rules' button in the top right corner of the table. Below the table, there is a modal form for creating a new rule. The form includes a dropdown menu for 'Select Existing Visibility Rule:' with 'Staff and above' selected. A red arrow points to the 'ADD NEW RULE' button in the top right corner of the modal. Below this, there is a text input field for 'New Rule Name' and a dropdown menu for 'Rule Type' with 'Roles' selected. A red arrow points to the 'Rule Type' dropdown. At the bottom left of the modal, there is a 'GO' button with a green checkmark icon.

# Manage Reports

Site Administration > Manage Site Navigation

Steps:

- Double click the 'Staff' user role and each one above it to move to the box on the right.
- Click Go to save.

The screenshot displays a web interface for managing site navigation. At the top, there is a dropdown menu labeled "Select Existing Visibility Rule:" and a button labeled "ADD NEW RULE" with a green arrow icon. Below this, the title "Roles for Visibility Rule: hi." is shown. The interface is divided into two main sections: "Available Roles:" on the left and "Existing Roles:" on the right. The "Available Roles:" section contains a list of roles: Enterprise Manager, Site Manager, Department Head, Program Manager, Staff, Funders/Reports Only, Intake, Survey Taker, and Entity Self Service. The "Existing Roles:" section is currently empty. Between the two sections are four buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). A red arrow points from the "Staff" role in the "Available Roles:" list to the "Existing Roles:" box. Another red arrow points from the "GO" button at the bottom right to the "Existing Roles:" box. The "GO" button has a green arrow icon.

# Manage Reports

Site Administration > Manage Site Navigation

Steps:

- On the row that says View Reports, click the radio button in the ‘Show using CX Rules’ column.
- Select the rule you created in the drop box in the far right column and click save at the bottom

Component	Feature	Default Rule	Show using default	Show using CX Rules	Manage Rules
	<input checked="" type="checkbox"/> Duplicated Participants	Site Manager	<input type="radio"/>	<input checked="" type="radio"/>	Set status for all CxRules to Staff <input type="button" value="Go"/>



# Manage Reports

Adding Reports

Site Administration > View Reports (New)

**View Reports**

[Manage Reports \(NEW\)](#) [Manage Report Universes](#) [Refresh Report List](#)

<input type="checkbox"/> Category Name
<input checked="" type="checkbox"/> <b>Demographics Reports</b>
<input type="checkbox"/> <b>Enrollment &amp; Dismissal Reports</b>
<b>Report</b>
<a href="#">Avery 8160 Mailing Labels for Participants</a>
<a href="#">Enrollments and Dismissals</a>



# Manage Reports

Give permission to the roles and programs that should be able to view the report.

**Manage Report: Participant Report**

[Return to Manage Reports](#) [Save](#)

Report Name: Participant Report  
Category: Uncategorized  
Description:

Show Disabled Programs:

Report description can not be edited unless a category has been selected.

**ABC Assistance Delaware**

<input type="checkbox"/> Program	<input type="checkbox"/> Developer	<input type="checkbox"/> Enterprise Manager	<input type="checkbox"/> Site Manager	<input type="checkbox"/> Department Head	<input type="checkbox"/> Program Manager	<input type="checkbox"/> Staff
<input type="checkbox"/> Healthy Living	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Intake	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Parents As Teachers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Social Work Center	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



# Manage Reports

Editing Reports

Site Administration > Manage Reports (New)

**Manage Reports**

[Manage Reports \(NEW\)](#) [Manage Categories](#) [ETO Results](#) [Refresh Rep](#)

**+ Category Name**

**- Uncategorized**

Take Action Report

[Edit](#) [Participant Report](#)

**- Assessment Aggregates Reports**

Take Action Report

[Edit](#) [Aggregate Assessment Report in a Date Range By Program](#)

[Edit](#) [Aggregate Assessment Report in a Date Range for the Current Program](#)

# Manage Reports

Uncheck the boxes associated with the user roles and programs who should NOT have access to the report.

**Manage Report: Participant Report**

[Return to Manage Reports](#) [Save](#)

Report Name: Participant Report  
Category: Uncategorized  
Description:

Show Disabled Programs:

Report description can not be edited unless a category has been selected.

**ABC Assistance Delaware**

<input type="checkbox"/> Program	<input type="checkbox"/> Developer	<input type="checkbox"/> Enterprise Manager	<input type="checkbox"/> Site Manager	<input type="checkbox"/> Department Head	<input type="checkbox"/> Program Manager	<input type="checkbox"/> Staff
<input type="checkbox"/> Healthy Living	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Intake	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Parents As Teachers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Social Work Center	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



# Welcome to Office Hours!

- Please use this time to

ASK QUESTIONS ABOUT FUNCTIONALITY

ASK TRAINER TO REDO A DEMO

ASK REAL-LIFE APPLICATION QUESTIONS



# We Value Your Feedback!

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