

Generating a New HMIS Report

To create and save an HMIS ReportBuilder report that can be re-run in the future, or to generate a single-use report, complete the following steps:

1. From the AWARDS Opening Menu page, click Profile. The Client/Program Profile page is displayed.

The screenshot shows the 'Client / Program Profile' web interface. At the top, there are three dropdown menus: 'Program/Site' (set to 'Family Housing One'), 'Database' (set to 'Data Entry'), and 'A-Z' (set to '*'). Below these are two main sections. The left section contains a 'Face Sheet' button and radio buttons for 'Current Roster' (selected) and 'Roster Archives'. The right section contains a 'Program Profile Report' button and radio buttons for 'Current Roster' (selected) and 'Roster History from' (with date pickers for '02/08/2011' and '02/08/2012'). At the bottom of the main content area are buttons for 'Monthly Profile' and 'ReportBuilders'. A footer bar contains buttons for 'Jump Back', 'Opening Menu', 'Help Menu', and 'Log Out'.

2. Click ReportBuilders. The Client/Program Profile ReportBuilders menu page is displayed.

3. Click the Program drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.

Please keep in mind that this report was designed primarily for use by programs set up to submit the HUD APR. IN AWARDS databases where no programs have been set up to submit the APR, the HMIS ReportBuilder functionality is NOT available. In AWARDS databases where at least one program has been set up to submit the APR, the HMIS ReportBuilder functionality is available for all programs. Keep in mind though that for programs that do not submit the APR many of the variables available for inclusion in the report are not collected, and as a result the report may not be complete.

4. Click HMIS ReportBuilder. The Report Settings page is displayed.

This page contains date range selections, as well as a list of any saved report formats to which you have access.

5. Click the Roster Date Range drop-down arrow and choose which consumers are to be included in the report based on their program history. Available selections are:

IMPORTANT! In all instances household members of clients are included in the report when those clients meeting the criteria specified here and in step 6.

→ In Program - When this option is selected the report will only include clients with program history records indicating they were enrolled in the program at some point during the specified date range. This selection is recommended if you will be narrowing the report contents using multiple date range filters (set in step 12 below).

In this context, clients who were enrolled in the program include those who entered the program on or before the report "To" date, those who were discharged from the program on or after the report "From" date, and those who were enrolled in the program for the entirety of the report period.

→ Admissions - When this option is selected the report will only include clients with program history records indicating they were admitted to the program at some point during the specified date range.

→ Discharges - When this option is selected the report will only include clients with program history records indicating they were discharged from the program at some point during the specified date range. Current program episodes will not be included.

In the event that you are creating a new report format that will be saved, please be aware that the selection you make here is not saved with the report. It, along with the date range specified in step 6, must be set each time the report is run.

6. By default, the report only looks for clients with program histories (of the type specified in the previous step) for today's date. In the From and To fields, make changes to that default date range as necessary (using mm/dd/yyyy format).
7. Leave the Select a saved report format: drop-down selection blank to generate a new report.
8. Click CONTINUE. The Report Options page is displayed.

**Family Housing One
HMIS ReportBuilder
Report Options**

Clients In Program: 11/04/2010 to 11/04/2010

Unduplicated Client Count

Choose fields to display:

Fields with a * are multiple value fields with restrictions in continued report options

Program Info

<input type="checkbox"/> HUD Program Type	<input type="checkbox"/> Program	<input type="checkbox"/> Program Category
<input type="checkbox"/> Program COC	<input type="checkbox"/> Program County	<input type="checkbox"/> Program Division
<input type="checkbox"/> Program GEO Code	<input type="checkbox"/> Program Group	<input type="checkbox"/> Program Submits APR
<input type="checkbox"/> Serves Homeless Only		

Demographics

<input type="checkbox"/> Age	<input type="checkbox"/> Age at Intake	<input type="checkbox"/> Birthdate Data Quality
<input type="checkbox"/> Branch of Military*	<input type="checkbox"/> Client ID	<input type="checkbox"/> Current Student

This page contains a list of program, client, and household member characteristic check boxes, grouped by information type, and representing data collected in several AWARDS locations:

Intake Form	Face Sheet	Household Info Form	Discharge Form	Agency Program Info
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Several other characteristics which are not necessarily found on the above forms are also available; for example "Age" and "Client ID."

The program, client, and household characteristics available for selection on this page are those that the agency collects for the programs set to submit the HUD APR. While the report can be run for non-HUD programs, keep in mind that for such programs many of the report variables are not collected and so the report may not be complete.

9. The HMIS ReportBuilder report includes all clients who were enrolled in, admitted to, or discharged from the selected program(s) during the specified date range, based on the selection made in steps 5 and 6, along with their household members. In some cases, that may result in duplicate report records in instances where a client has multiple histories in a single program, or a history in multiple programs. To filter out those duplicates and to list each client and household member only once in the report results, click the Unduplicated client count check box.

When this option is checked, corresponding Earliest and Latest radio buttons are displayed; click one as appropriate.



When "earliest" is selected, the report contents include the earliest program history for the client within the specified roster date range. When "latest" is selected, the report contents include the most recent program history for the client in that date range.

10. Click the check box next to each program, client, and household member characteristic for which data is to be included in the report.

Characteristic fields with an asterisk (*) next to them are those for which one client or household member may have multiple values. Multiple value fields include those that have check boxes for data entry where multiple boxes may be checked for each individual, as well as instances where multiple records may have been entered for a client, such as children details.

11. Click CONTINUE. The Report Options - Continued page is displayed.
12. Configure the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents, and set the "Show Individual Detail" and/or "Summary Tables" options to adjust the way in which the contents are displayed.

Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options, see [HMIS ReportBuilder Viewing Options](#).

13. To save the report settings so that this report can be easily re-run in the future, click SAVE REPORT FORMAT. The Save Report Format dialog box is displayed.

A screenshot of a "Save Report Format" dialog box. The title bar reads "Save Report Format". Below the title, there is explanatory text: "This feature allows you to save your settings selected for this report without requiring you to enter all the settings repeatedly when you want to run the same report in the future." and "You will only be able to modify or delete a report format that you created yourself unless you are in the system administrator usergroup." The dialog contains three rows of controls: "Report Format Title:" with a text input field; "Save Report Format for:" with radio buttons for "Yourself" (selected) and "All Staff"; and "Allow Report Format for:" with radio buttons for "This Program" and "All Programs" (selected). At the bottom, there are two buttons: "Save Report Format" and "Cancel".

If it is not necessary to save the report format and you wish only to view the report contents, please skip to step 18.

14. In the Report Format Title field, type the name of the report.

We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

15. Click one of the Save Report Format for radio buttons to determine who the report should be accessible by. Available options are:

→ Yourself - When this option is selected, only the user saving the report format has the ability to use or modify that format.

→ All Staff - When this option is selected, all staff in the program(s) selected in step 3 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

16. Click one of the available Allow Report Format for radio buttons to determine which programs this report format can be used for. Available options are:

→ This Program - When this option is selected, the report format being saved is available for use only by the program selected in step 3.

→ All Programs - When this option is selected, the report format being saved is available for use by all programs, regardless of which program was selected in step 3.

The Allow Report Format for options are only available when a single program was selected in step 3; otherwise, the format is saved for all programs by default.

17. Click Save Report Format. The report format is saved and the Report Options - Continued page is re-displayed.

18. Click DISPLAY REPORT. The report is generated and displayed on the HMIS ReportBuilder page.

When working with the report data, please keep in mind that:

→ The report shows the values for each characteristic as of the date on which the report is generated. For example, if a client's marital status on his or her date of intake was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the client's intake date.

→ When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each client or household member includes a list of the characteristic values separated by commas. Additionally, because each client or household member may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total number of record count for the report.

→ If a report's results include fewer than 5,000 records, the data comes from the live database. If the report's results include more than 5,000 records, the data comes from the previous night's database backup, and it is exported to a data file rather than displayed on the screen. The number of records included in the report, and the link to the data file (if applicable), is displayed on the report page.

→ When a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.

19. Once the report is displayed, complete any of the following tasks as needed:

→ Show/hide individual detail or summary table content - In some cases you may have chosen to include a program, client, or household member characteristic in the report for filtering or grouping purposes, but do not necessarily want to see the associated individual detail. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page, as well as whether individual detail is shown or hidden. To do so, click the show/hide icon to the left of the table you would like to alter.



The Column/Row Display pop-up for that table is displayed, an example of which is shown here:

Column Display	
<input checked="" type="checkbox"/>	Person Type
<input checked="" type="checkbox"/>	Age
<input checked="" type="checkbox"/>	Gender
<input checked="" type="checkbox"/>	Race
<input checked="" type="checkbox"/>	Veteran?
Row Display	
<input checked="" type="checkbox"/>	Details

Check or uncheck columns for that table as needed, and/or uncheck the row display "Details" option to hide individual detail completely (leaving only "grouped on" data/cells and subtotal footer rows, if applicable). Checked columns/rows are displayed, unchecked are hidden.

The option to hide individual detail rows is only available when grouped on/footer options have been selected under "Individual Detail" on the Report Options - Continued page.

Showing/hiding columns and/or rows of individual detail or summary tables does not impact the contents of the Excel File version of the report data.

→ Sort individual detail or summary table contents - Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press <SHIFT> and click on the second column heading.

When "Grouped On" has been selected as an individual detail option under report settings, sorting is NOT available.

When sorting is used, an ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↑) or descending (↓) order. In this example, the table is being sorted alphabetically by client/household member name from A to Z.



Changing the sort order of an individual detail or summary table overrides any sorting for those tables specified in the report settings or in a saved report format. However, such changes do not impact the contents of the Excel File version of report data, nor are they saved when a report format is saved.

→ Print the report - To do so, click File on the Internet browser's menu bar and select Print. Adjust the printer settings as necessary, and then click Print to complete the printing process.

→ Export the contents to Microsoft Excel - To do so, click the Excel File link at the top of the page.

→ Save the format of the report for future use if you have not already done so - To do so, click the Internet browser's Back button to return to the Report Options - Continued page, and then complete steps 13 through 17 above.

The process of generating a new HMIS ReportBuilder report is now complete.