

Guide to Recommended ART Reports

NCCEH Data Center
September 2016



North Carolina Coalition to End Homelessness

securing resources

encouraging public dialogue

advocating for public policy change

Table of Contents

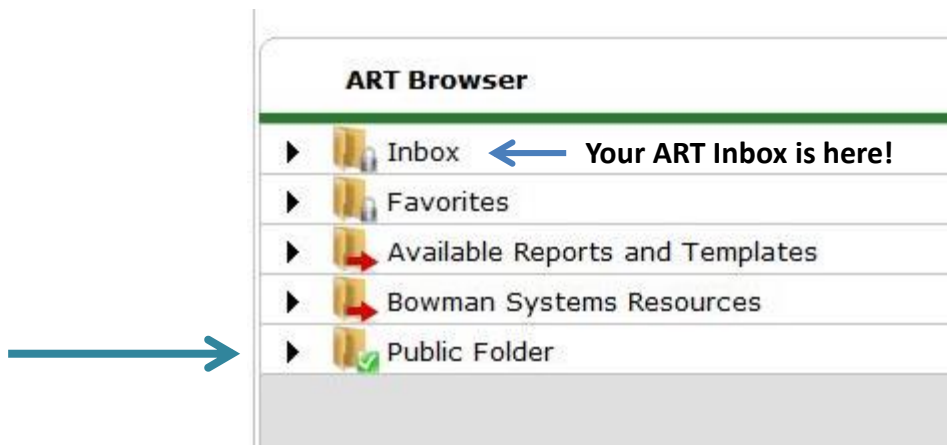
How to access ART	3
Recommended Reports	
Data Quality	4
Case Management	6
Project Management	7
Agency Administrator	9
Reports for Funders	10
Scheduling reports in ART	11
Understanding ART prompts- Single Project	14
Understanding ART prompts- Multiple Projects	15
HUD Data Standards (UDEs and Program Specific)	16

How to Access ART

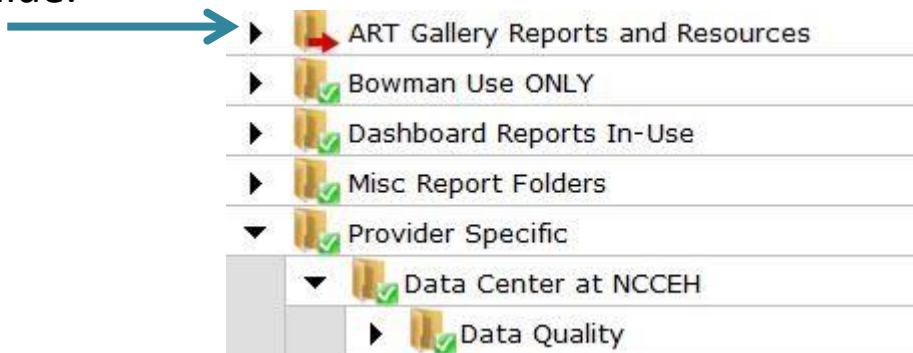
- 1 Select Connect to ART from top right hand corner of the Home Dashboard.



- 2 Click the triangle beside the Public Folder to expand it.



- 3 Click the triangles next to the “ART Gallery Reports and Resources” folder to access the reports recommended in this guide.



Data Quality

0213 Data Elements/Quality at Creation/Entry/Exit

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report is a data completeness monitoring tool for HUD Universal Data Elements entered at record creation, project entry and project exit. The report includes a detail section to assist users in finding and fixing data entry omissions.
Interval	Monthly

02160 Unexited Clients Exceeding Max Length of Stay

Project Types	SO, ES, TH, RRH, PSH
Description	This report monitors data quality by insuring that all clients an accurate project exit recorded in a timely manner. The report allows the User the ability to examine the length of stay (LOS) for all unexited clients . The User must specify the maximum length of stay for each project enabling the report to flag clients whose LOS has exceeded the limit. In addition to listing all unexited clients along with their entry date and LOS, the report also calculates the number of unexited clients, the average LOS for unexited clients, and the number of clients exceeding their maximum LOS. Unexited clients mistakenly entered into the project more than once are also flagged.
Interval	Monthly

0252 Data Quality Report Card (EE)

Project Types	SO, ES, TH, RRH, PSH
Description	This report is a data completeness monitoring tool that produces a letter grade for individual providers. The report checks for null/missing UDEs at client Entry and Exit, and identifies inconsistent subassessment data. The report includes a detail section to assist users in finding and fixing data entry omissions. The detail tab identifies the clients within your project with missing Universal Data Elements and required Program Specific Elements. Data may be marked as “Null” or missing regardless of your program requirements.
Interval	Monthly
Note	Keep in mind that Enter Data As (EDA) has a tremendous impacts on this report. We recommend projects that require services use the optional Service Transactions prompt.

Data Quality (2)

0253 Income Data Quality

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report captures numerous data quality issues that can occur within the income subassessment at project entry and exit. This includes duplicate sources and amounts, earned income conflicts, and no income conflicts.
Interval	Monthly

0260 HUD CoC APR Data Quality/Completeness Report

Project Types	TH, RRH, PSH
Description	This report monitors data quality for the 0625 HUD CoC APR. It provides information about missing HUD Universal Data Elements and identifies annual assessments that are missing or completed outside of the 60 day window. The report includes a detail section to assist users in finding and fixing null and erroneous data.
Interval	Monthly
Note	This report should not be used by emergency shelters

0631 HUD CoC APR Detail

Project Types	TH, RRH, PSH
Description	This ART Gallery report is a companion to report 0625 HUD CoC APR and displays the record level detail behind the HUD CoC APR summary tables. The report consist of several tabs that focus on different areas of HUD CoC APR data. The report flags null data, identifies non-HUD assessment question values, and duplicate clients included in the dataset.
Interval	Monthly
Note	This report should not be used by emergency shelters

Case Management

0401 Client Project History

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report is designed to allow the case worker to examine or print a client's project history as recorded in ServicePoint. The report contains a chronological summary of a client's project enrollment and service history as well as a more detailed display of each event. Users can specify a single client or a list of clients to include in the results.
Interval	As Needed

0404 Client Case Plans

Project Types	SO, ES, TH, RRH, PSH
Description	This report allows users to view multiple clients and their respective case plans at once. The Case Plan document displays goals, action steps, and case notes with full details as well as a history of the client's project enrollment, caseworkers, and infractions. Additional Tabs include a case note – only display, a goal analysis tab and case plan statistics.
Interval	As Needed

0552 Goal Outcomes

Project Types	SO, ES, TH, RRH, PSH
Description	Are the clients in your project achieving their goals? The purpose of this report is to first look at goal outcomes by goal types. Goal outcomes are also grouped by demographic and service-related variables to determine if other factors might be affecting goal outcomes.
Interval	As Needed

Project Management

0315 Project Daily Census

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report provides a daily project census for a selected project for a 31 day period of time. The daily census is based on client entries and exits, and includes individual counts, household counts, percent of capacity and breakdowns by gender, age, race, ethnicity and prior living situation. In addition to this summary data, the report includes the client detail related to each breakdown, and combined counts for the entire reporting period.
Interval	As needed

0347 Billing Summary

Project Types	SO, ES, TH, RRH, PSH
Description	This report allows users to examine billable services by project, service type, client, and case worker .
Interval	As needed
Note	Projects must enter cost information for each service transaction to use this report.

0550 Exit Destination Outcomes

Project Types	SO, ES, TH, RRH, PSH
Description	This report uses exit information to show where clients went after they left your project and whether they were positive or negative destinations. In addition to basic exit and outcome information, the report groups positive and negative exits by different variables such as household status and the number of services received during the project. As a result, projects can learn more about how those variables are associated with positive and negative exit destinations .
Interval	Monthly

Project Management (2)

0551 Exit Reason Leaving Outcomes

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This report displays the reasons for which your clients left your project and whether they were positive or negative reasons. In addition to basic exit and outcome information, the report groups positive and negative exits by different variables such as household status and the number of services received during the project. As a result, you can see how those variables are associated with the positive and negative reasons for leaving the projects.
Interval	Monthly

0554.01 Income Improvement

Project Types	SO, ES, TH, RRH, PSH
Description	This report allows projects to see if a client has improved their income during their stay. An increase in income during a stay is counted positively. However, instances in which there is no change in client income are counted negatively, since income is not improving.
Interval	Monthly

Agency Administrators

0123 ServicePoint User Last Login Report

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This reports allows administrators to identify inactive users and to analyze system usage patterns.
Interval	Monthly

0227 Project Descriptor Elements Data Quality

Project Types	SO, ES, TH, RRH, PSH
Description	This report is designed to monitor data quality by locating HUD required project descriptor data which is missing. This data is crucial to CoC Program Applications, APRs – CoC and HMIS, and for HUD System Performance Measures.
Interval	Quarterly

Data Quality at Creation/Entry/Exit by User

Project Types	SO, ES, TH, RRH, PSH
Description	Do you want to see your systems overall data completeness of your individual providers? This report is a data completeness monitoring tool that produces a letter grade for the system as well as the individual providers. Prompts allow the user to specify a date range and to select the provider(s) on which to base the report as well as the option to include services or not. The report includes a detail section to assist agency end-users in finding and fixing data entry omissions.
Interval	Quarterly

Reports for Funders

0323 Project Demographics

Project Types	Street Outreach (SO), Emergency Shelter (ES), Transitional Housing (TH), Rapid Re-housing (RRH), Permanent Supportive Housing (PSH)
Description	This ART report provides demographics on clients served during a user specified reporting period. Data is compiled using the last transaction per client for Entry/Exits, Services and/or Shelter Stays. The report also contains various tabs with tables and graphs for Project Type, Age/Gender, Race/Ethnicity, Homeless Condition, Veteran Status, Disability, Domestic Violence/Extent, Income/Non-Cash Benefits, and Employment/Education.
Interval	As Needed

0625 HUD CoC APR

Project Types	TH, RRH, PSH
Description	This ART Gallery report has been to allow for the completion of the HUD CoC APR. The layout of the report is aligned with e-snaps forms. A companion ART Gallery Report, the 0631 HUD CoC APR Detail provides several data detail and data quality tabs to assist the user in reviewing data for completeness and accuracy.
Interval	Quarterly

D554 - Income Change Pie Chart

Project Types	SO, ES, TH, RRH, PSH
Description	This dashlet shows those clients in a project whose income has exhibited a positive change versus those who have not. You can select all clients or only those 18 and over.
Interval	As needed

2016 CAPER

Project Types	Prevention (PREV), SO, ES, TH, RRH
Description	This report is used by Emergency Solutions Grant (ESG) funded projects for annual reporting. The easy to navigate interface allows projects to correct Missing data by clicking numbers hyperlinked in blue.
Interval	Quarterly
Note	This is not an ART report and runs live. No need to schedule or wait for results. This report is located on the report dashboard, accessed through the Reports menu always on the left of ServicePoint.

Scheduling Reports in ART

- 4 Click the triangle next to the “ART Gallery Reports and Resources” and “Art Gallery Reports” folders to access the recommended reports.



- 5 To schedule an ART report, click the magnifying glass next to report. We recommend scheduling all ART reports.



- 6 In the ART Item Details window, select the Schedule Report button. In this example, we’re scheduling the Data Completeness Report Card

A screenshot of the "ART Item Details" window. The title bar says "ART Item Details". The main content area is titled "0252 - Data Completeness Report ...". Below the title, there is a table with the following fields: Name (0252 - Data Completeness Report Card (EE) - v15), Description (Do you want to see your systems overall data completeness of your individual providers? This report is a data completeness monitoring tool that), Creation Date (2016-06-30 12:56), Update Date (2016-06-30 12:57), Type (Webi), and Owner (chin_live:tiasrice503). At the bottom of the window, there is a row of buttons: "View Report", "Edit Report", "Schedule Report" (which is highlighted with a blue border), "Send", "Organize", and "Delete".

7

Complete the prompts below by clicking on each prompt and entering or selecting the suggested text. Do not click Next until you have entered all prompts. You may skip prompts that say “optional”. The text below is just an example. Each report has different prompts. Please contact us if you need assistance completing them in ART.

NOTE: Agencies *never* use the CoC Code prompt. Always leave this prompt **blank**.

The screenshot shows the 'ART Report' window with a 'Prompts' section. Below the section title is the instruction 'Fill out each of the prompts below *'. A list of prompts is shown in a scrollable area:

- EDA Provider
- Enter Start Date:
- Enter End Date PLUS 1 Day:
- Select Provider(s):
- Include Services in Report Card?

Annotations with arrows point to each prompt:

- EDA Provider: Enter the name of project
- Enter Start Date: Enter start date
- Enter End Date PLUS 1 Day: Enter end date + 1 day
- Select Provider(s): Enter the name of project
- Include Services in Report Card?: Select "Yes" only if you enter service transactions

Below the prompts list, there is a text input field containing 'EDA Provider', a button labeled '-Default Provider-', and a button labeled 'Select'. At the bottom right of the form is a button labeled 'Next'.

8

Click the Next button to schedule the report.

A close-up of the 'Next' button, which is a rectangular button with a blue border and the text 'Next' in the center.

9

Select the desired Report Format and Interval from the drop down menus. We recommend Excel for report format. See Interval section of each report for frequency recommendations. Only schedule up to three months in advance.

Schedule Report ✕

Schedule

Name *	0252 - Data Completeness Report Cal				
Report Format *	Excel ▾				
Users Inbox *	Andrea Carey (5510)	Search	My User	Clear	
Interval *	Monthly ▾	Run Every Month ▾			
Start Date *	10 / 03 / 2016	23	4	: 00	AM ▾
End Date *	12 / 03 / 2016	23	5	: 00	AM ▾

Send

10

Change the End Date time to allow the report at least 1 hour to run. In the example above, we've edited the End Date time to reflect 5:00 AM.

11

Click Send. Check your ART inbox in 1 hour to download the report.

Advanced Reporting Tool

ART Browser

- ▶ Inbox
- ▶ Favorites
- ▶ Available Reports and Templates
- ▶ Bowman Systems Resources
- ▶ Public Folder



Protect client data.
Never save client identifying information to your computer.

Understanding ART Prompts

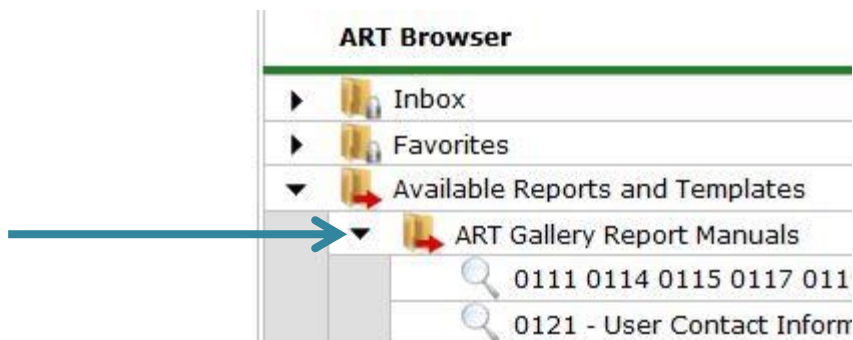
To run reports in ART, you will need to give ART information about which project(s) you want included in the report, the calendar dates you want the report to cover, etc. When scheduling an ART report, this information is captured in the “Prompts” window.



A large majority of ART reports require users to provide Start Date, End Date, Provider, EDA Provider and Effective Date. We’ve explained each of these items on the next page.

Some reports require you to enter additional information.

Good News: There is a manual for each report recommended in this guide. The manuals explain all of the prompts required for each report. Click the triangles next to the “Available Reports and Templates” and “ART Gallery Report Manuals” folder to access the reports recommended in this guide.



Understanding ART Prompts

Basic Prompts

Report Start Date: The date corresponding to the beginning of the desired date range for the report.

Report End Date: Enter the date one day after the end of the desired date range.

Effective date: Enter the date for which all data should be effective. This should be the same as the End Date PLUS 1 day.

Provider(s) for Report: Select the project(s) to include in the report.

EDA Provider: Select the project to include in the report. ONLY enter this prompt if running a report for a single project. If running a report for multiple projects, SKIP this prompt.

HUD Data Standards

<u>Universal Data Element's – All programs</u>	
Name	(All, Must Select Data Quality Type)
Social Security Number	(All, Must Select Data Quality Type)
Date of Birth	(All, Must Select Data Quality Type)
Race	(All)
Ethnicity	(All)
Gender	(All)
Veteran Status	(HoH & Adults Only)
Disabling Condition	(All)
Living Situation	(HoH & Adults Only)
- A: Living Situation	(HoH & Adults Only)
- B: Prior Living Situation	(HoH & Adults Only)
Project Entry Date	(All)
Project Exit Date	(All)
Destination	(All)
Personal ID	(HMIS System Automatically Generates)
Household ID	(HMIS System Automatically Generates)
Relationship to Head of Household	(All)
Client Location	(Normally your CoC)

HUD Data Standards

(continued)

<u>Program Specific Data Elements Apply to Specific Programs</u>	
Housing Status	(Required for PATH, HOPWA)
Income and Sources	(HoH & Adults Only)
Non-Cash Benefits	(HoH & Adults Only)
Health Insurance	(All)
Physical Disability	(All)
Developmental Disability	(All)
Chronic Health Condition	(All)
HIV/AIDS	(All)
Mental Health Problem	(All)
Substance Abuse	(All)
Domestic Violence	(HoH & Adults Only)
Contact	(SO for All Clients)
Date of Engagement	(Street Outreach Only)
Services Provided	(Required for HOPWA, PATH RHY, SSVF)
Financial Assistance Provided	(Required for HOPWA, SSVF)
Referrals Provided	(Not Required for CoC & ESG)
Residential Move-In Date	(RRH Only for All Clients)
Housing Assessment at Exit	(Prevention Only for All Clients)

ncceh.org/hmis

access local support for Balance of State, Wake,
Durham, & Orange CoCs

919.410.6997 or hmis@ncceh.org

helpdesk for local support

Executive Director

Denise Neunaber, denise@ncceh.org

Data Analyst

Tia Sanders-Rice, tia@ncceh.org

System Administrators

Thurston Alexander-Smith, thurston@ncceh.org

Jasmin Volkel, jasmin@ncceh.org

Support Specialist

Andrea Carey, andrea@ncceh.org



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securing resources

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advocating for public policy change