ART Gallery Report 222

Work-flow Elements by Client
Data Quality Report

EXECUTIVE SUMMARY:
This ART report is designed to monitor data quality by insuring that all clients in a selected project/provider have all the workflow elements required for that particular project. The report monitors ten common workflow elements including project entries, project exits, client needs, service transaction creation, service provision, referrals, client goals, call records, shelter stays and ROIs. A “Project Summary” section reports the number of clients with and without each of the ten elements as well as the total number of each element that has been recorded. A “Client Detail” section reports the number of each of the ten elements that has been recorded for each client, allowing users to easily identify clients with missing elements.

AUDIENCE:
This report is intended for use by Agency Administrators, by Project data entry staff, or by other HMIS administrators responsible for data quality. The report can be run at any provider level at or above the selected project.

FREQUENCY:
It is recommended that this report should be run monthly for each project.

PURPOSE:
Monitoring data for missing work-flow elements is a basic data quality procedure, since missing element will frequently result in erroneous reporting.

INSTRUCTIONS:

The easiest way to start using this report is to navigate to the automapper. This is a folder that has the reports automatically mapped to your site, so that you don’t have to map them yourself. You can navigate to the automapper as shown in Figure 1, below:

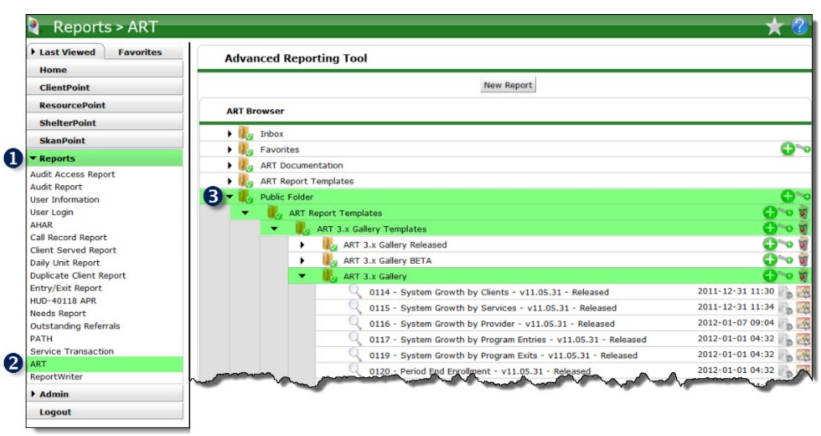

Figure 1

Requests for additional information concerning the report function/design should be directed to Bowman Systems’ Customer Support Specialist (CSS) staff.

How to run:
Upon opening the report, the User will be prompted (see Figure 1) to specify (or select) parameters which control the data returned by the report. Once the User has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a valid selection has been made. The User should then single-click the “Run Query” button to generate the Report.

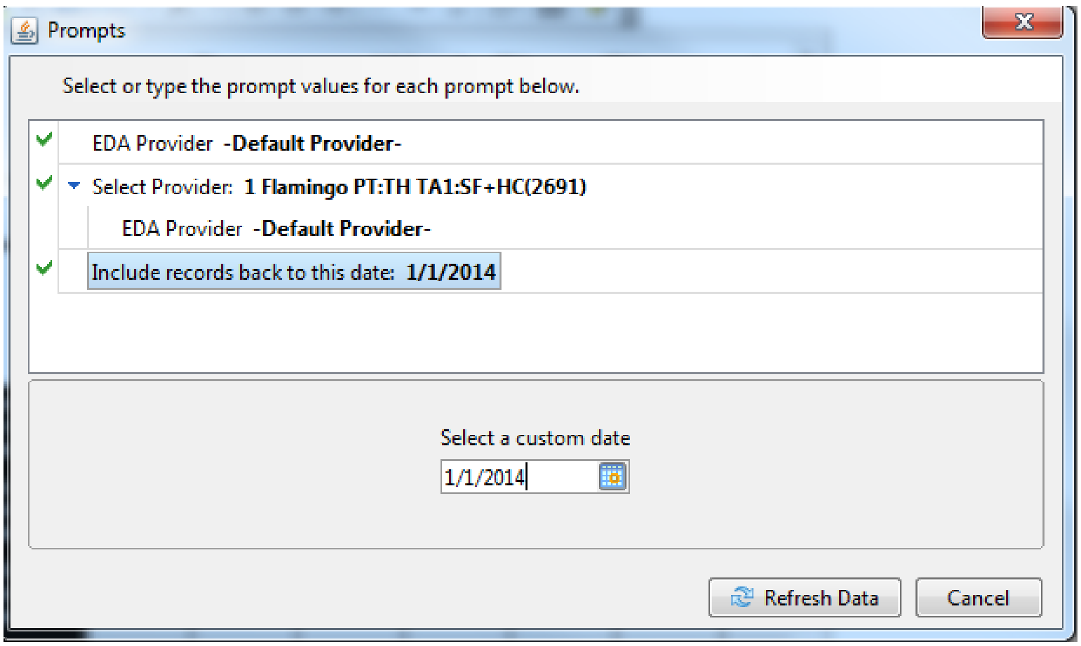

Figure 2

The two user prompts contained in this report are outlined below along with instruction on how each should be answered:

1. **Select Provider:** The user selects the project/ provider to be the subject of the report.
2. **Included records back to this date:** The user should enter (or select from the calendar) a single date. The report will include all client records from this specified date to present (that is the date of the most recent data build).

How to read The report results consist of two report tabs. The first tab/sub-reports is the main body of the report and includes a “Project Summary” section and a “Client Detail” section. The second tab/sub-report includes the selected parameters and additional information provided for the user’s reference. These two tabs/sub-reports are displayed and explained below:

Program Work-Flow Elements by Client

Data Quality Report

Includes records from 1/1/90 to 12/23/09

SUMMARY FOR 1 10th Street Shelter(2055)	Created Clients	Protram Entries	Program Exits	Needs Recorded	Services Created	Services Provided	Referrals Made	Shelter Stays	Call Records	Goals Set	Client ROIs
Total Number of Work-flow Elements	--	1,375	1,359	7,322	4,602	4,378	-	1,614	-	1	1
Clients With This Work-flow Element	1,349	1,004	988	1,328	1,238	1,132	-	1,061	-	1	1
Clients Without This Work-flow Element	167	512	528	188	278	384	1,516	455	1,516	1,516	1,515
Total Clients	1,516	1,516	1,516	1,516	1,516	1,516	1,516	1,516	1,516	1,516	1,516

DETAIL BY CLIENT FOR
1 10th Street Shelter(2055)

Client ID Number	Created Clients	Program Entries	Program Exits	Needs Recorded	Services Created	Services Provided	Referrals Made	Shelter Stays	Call Records	Goals Set	Client ROIs
479	-	1	1	-	-	-	-	-	-	-	-
481	-	1	1	-	-	-	-	-	-	-	-
555	-	-	-	-	-	-	-	-	-	-	-
1063	-	1	1	-	-	-	-	-	-	-	-
1081	-	-	-	-	-	-	-	-	-	-	-
1764	yes	-	-	1	-	-	-	-	-	-	-
2069	-	1	1	10	1	1	-	1	-	-	-
2767	-	-	-	2	1	-	-	-	-	-	-
3147	-	1	1	1	1	1	-	1	-	-	-
3179	-	-	-	1	-	-	-	-	-	-	-
3195	-	-	-	1	-	-	-	-	-	-	-

Figure 3

Tab A – Summary (Figure 3): This tab/sub-report contains three sections:

- **Summary for Provide**r Row 1 of this section reports the number of times each of the ten workflow elements has been recorded relative to the select project/provider during the specified date range. The second and third rows report the number of project clients who possess and who do not possess each of the ten elements, as well as the number of clients "created by" the provider, and the number not created by the provider. The fourth row which is the sum of rows two and three represents the total number of project clients during the date range.

- **Detail by Client** This section reports the number of workflow elements for each individual client and also indicates whether each client was "created by" the provider or not. By finding the dashes “-“ in each column, the user can easily determine the omission errors and make the necessary corrections.

Tab B -Additional Information: This tab is provided as a reference to the User running the report and lists the parameters specified in the user prompts (Figure 4) as well as the total duplicated and unduplicated client counts for the specified provider (Figure 5).

User Prompt Field	Value(s) Selected
Enter Start Date:	1/1/99
Enter Provider(s) for Report:	*ABC Shelter for Women and Families(8325)

Figure 4

Providers Reporting Information	Client Count	Unduplicated Client Count
*ABC Shelter for Women and Families(8325)	513	506

Figure 5

TECHNICAL NOTES:

1. The manner in which clients are identified for inclusion in the report has been designed to be as comprehensive as possible. If a client meets any one (or more) of the following he/she is then considered to be a client of the specified project and included in the report results.
    - Client created by provider on or after report start date
    - Provider was last to update client profile on or after report start date
    - Project entry into provider by client on or after report start date
    - Provider recorded as a service provider for client on or after report start date
    - Service recorded for client by provider on or after the report start date
    - Provider recorded as a need provider for client on or after report start date
    - Call record recorded by provider for client on or after report start date
    - Goal set for client by provider on or after report start date
    - Referral made by the provider on or after report start date
    - Shelter stay recorded for the provider on or after report start date
    - ROI recorded for client by provider on or after report start date
2. The definitions used for the ten work-flow elements and the manner for determining whether a particular client has or has not received each is as follows:

- **Project entry**- a client entry into selected project on or after the specified start date
- **Project exit-** a recorded project exit related to an entry into selected project on or after the specified start date
- **Recorded need-** a recorded client need by the selected project on or after the specified start date
- **Created Service -** a client service recorded by the selected project on or after the specified start date
- **Provided Service -** a recorded client service where the selected project is specified as the service provider and the service start date is on or after the specified report start date
- **Referral made - -** a client service recorded by the selected project with a corresponding referral date on or after the specified start date
- **Call record** - a client call record recorded by the specified provider on or after the specified report start date
- **Goal set** - a client goal set by the specified provider on or after the specified report start date
- **Shelter stay** - a client shelter stay was recorded for the specified provider on or after the specified report start date
- **Client ROI** - a client ROI recorded by the specified provider on or after the specified report start date.

3. It should be noted that inactive clients, entry-exits, needs, services, call records, goals and ROIs were all excluded from the results.

4. Some implementations may use multiple providers to track a single project's activities. In such cases it will be necessary to run the report separately for each provider in order to verify the projects workflow elements, or to modify the report's sub-queries to pull in multiple providers as described below.

REPORT MODIFICATION

Users with ad-hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an ART Gallery report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the "save as" feature or by clicking on the "organize" icon in folder view.

NOTE: The original un-modified version of this report must be retained in the "ART Gallery Reports" folder. This folder is read-only so that changes cannot be inadvertently made to the original version. <u>Since the "ART Gallery Reports" folder is a read-only folder, any/all copies of the report for modification purposes must be made into some other folder.</u>

MODIFICATION OPTIONS

Ad hoc users may choose to customize this report to include only work-flow elements related to a specific project or specific grouping of projects. The report has been designed in such a way as to facilitate such modification. To remove an un-needed work-flow element from the report, the ad hoc user needs only to delete the irrelevant column(s) while in report design view. The modification can be made in this manner without affecting the other data in the report.

Experienced ad hoc users also will be able to included additional work-flow elements in the report if needed. This would be done by constructing additional sub-queries, according to the query logic utilized in this report, and by constructing needed variables and adding the needed column(s) to the report chart.

In certain situations ad hoc users may desire to modify this report to run on multiple providers rather than on a single provider by changing the provider prompts in the various sub-queries to an "in-list" prompts instead of the current "is equal to" prompts. Although this change can be made, the following caution should be noted and considered prior to attempting such a modification:

- It should also be noted that simply changing the prompt to an "in-list" prompt would result in the selected providers being treated as a single entity and not as separate entities. The report would evaluate the data and would count the project elements for each client based on whether the element met the criteria for <u>any of</u> the selected providers, and it would <u>not</u> report <u>on each</u> selected provider/project separately. Because clients are attached to providers in multiple ways the report in its existing form cannot be sectioned by providers. Such a change would require the merging of the various provider fields and a complete redesign of the report.

MAPPING OBJECTS

UNIVERSE: template_u

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
BISData	Client Uid	**Location:** Clients **Use:** Results Object
	Client Date Added	**Location:** Clients **Use:** Results Object
	Client Unique Id	**Location:** Clients **Use:** Results Object
	Client Provider Creating	**Location:** Clients **Use:** Filter Object
	Client Inactive	**Location:** Clients **Use:** Filter Object
ENTRIES	Client Uid	**Location:** Clients **Use:** Results Object
	Client Unique Id	**Location:** Clients **Use:** Results Object
	Entry Exit Uid	**Location:** Entry Exit (Outer) **Use:** Results Object
	Entry Exit Entry Date	**Location:** Entry Exit (Outer) **Use:** Filter Object
	Entry Exit Provider Id	**Location:** Entry Exit (Outer) **Use:** Filter Object
	Client Inactive	**Location:** Clients **Use:** Filter Object
	Entry Exit Inactive	**Location:** Entry Exit (Outer) **Use:** Filter Object
SERV PROV	Client Uid	**Location:** Clients **Use:** Results Object
	Client Unique Id	**Location:** Clients **Use:** Results Object
	Service Uid	**Location:** Services (Outer) **Use:** Results Object
	Service Provide Start Date	**Location:** Services (Outer) **Use:** Sub-query Filter
	Service Provide Provider	**Location:** Services (Outer) **Use:** Filter Object
	Client Inactive	**Location:** Clients **Use:** Filter Object
	Services Inactive	**Location:** Services (Outer) **Use:** Filter Object
SERV CREATE	Client Uid	**Location:** Clients **Use:** Results Object
	Client Unique Id	**Location:** Clients **Use:** Results Object
	Service Uid	**Location:** Services (Outer) **Use:** Results Object
	Service Date Added	**Location:** Services (Outer)

		Use:	Filter Object
	Service Provider Creating	**Location:**	Services (Outer)
		Use:	Filter Object
	Client Inactive	**Location:**	Clients
		Use:	Filter Object
	Service Inactive	**Location:**	Services (Outer)
		Use:	Filter Object
ROIS	Client Uid	**Location:**	Clients
		Use:	Results Object
	Client Unique Id	**Location:**	Clients
		Use:	Results Object
	ROI Uid	**Location:**	ROI (Outer)
		Use:	Results Object
	ROI Date Added	**Location:**	ROI (Outer)
		Use:	Filter Object
	ROI Provider	**Location:**	ROI (Outer)
		Use:	Filter Object
	Client Inactive	**Location:**	Clients
		Use:	Filter Object
	ROIs Inactive	**Location:**	ROI (Outer)
		Use:	Filter Object
GOALS	Client Uid	**Location:**	Clients
		Use:	Results Object
	Client Unique Id	**Location:**	Clients
		Use:	Results Object
	Goal Uid	**Location:**	Goals (Outer)
		Use:	Results Object
	Goal Date Set	**Location:**	Goals (Outer)
		Use:	Filter Object
	Goal Provider Creating	**Location:**	Goals (Outer)
		Use:	Filter Object
	Client Inactive	**Location:**	Clients
		Use:	Filter Object
	Goal Inactive	**Location:**	Goals (Outer)
		Use:	Filter Object
NEEDS	Client Uid	**Location:**	Clients
		Use:	Results Object
	Client Unique Id	**Location:**	Clients
		Use:	Results Object
	Need Uid	**Location:**	Needs (Outer)
		Use:	Results Object
	Client Inactive	**Location:**	Clients
		Use:	Filter Object
	Need Inactive	**Location:**	Needs (Outer)
		Use:	Results Object
	Need Provider Creating	**Location:**	Needs (Outer)
		Use:	Results Object
	Need Date Added	**Location:**	Needs (Outer)

		Use:	Results Object
CALLS	Client Uid	**Location:** **Use:**	Clients Results Object
	Client Unique Id	**Location:** **Use:**	Clients Results Object
	Call Record Date Added	**Location:** **Use:**	Calls (Outer) Filter Object
	Call Record Provider Creating	**Location:** **Use:**	Calls (Outer) Filter Object
	Client Inactive	**Location:** **Use:**	Clients Filter Object
	Call Inactive	**Location:** **Use:**	Calls (Outer) Filter Object
REFERRALS	Client Uid	**Location:** **Use:**	Clients Results Object
	Client Unique Id	**Location:** **Use:**	Clients Results Object
	Service Uid	**Location:** **Use:**	Services (Outer) Results Object
	Service Refer Date	**Location:** **Use:**	Services (Outer) Filter Object
	Service Provider Creating	**Location:** **Use:**	Services (Outer) Filter Object
	Client Inactive	**Location:** **Use:**	Clients Filter Object
	Service Inactive	**Location:** **Use:**	Services (Outer) Filter Object
SHELTER	Client Uid	**Location:** **Use:**	Clients Results Object
	Client Unique Id	**Location:** **Use:**	Clients Results Object
	Service Uid	**Location:** **Use:**	Services (Outer) Results Object
	Service Shelter Item	**Location:** **Use:**	Services (Outer) Filter Object
	Services Provide Start Date	**Location:** **Use:**	Services (Outer) Filter Object
	Service Provide Provider	**Location:** **Use:**	Services (Outer) Filter Object
	Client Inactive	**Location:** **Use:**	Clients Filter Object
	Services Inactive	**Location:** **Use:**	Services (Outer) Filter Object
EXITS	Client Uid	**Location:** **Use:**	Clients Results Object
	Client Unique Id	**Location:** **Use:**	Clients Results Object
	Entry Exit Uid	**Location:**	Entry Exit (Outer)

		Use:	Results Object
	Entry Exit Entry Date	**Location:** **Use:**	Entry Exit (Outer) Filter Object
	Entry Exit Exit Date	**Location:** **Use:**	Entry Exit (Outer) Filter Object
	Entry Exit Provider Id	**Location:** **Use:**	Entry Exit (Outer) Filter Object
	Client Inactive	**Location:** **Use:**	Clients Filter Object
	Entry Exit Inactive	**Location:** **Use:**	Entry Exit (Outer) Filter Object

REVISION HISTORY:

Version	Description of Changes
V11.04.13	Original version –BETA
V2	Revision: Removed Client Updated query; removed sub-queries; updated default prompt date.