

ART Gallery Report 0254

Shelter History, Overlap and Return Entry Exits or Shelter Stays

EXECUTIVE SUMMARY:

This report will display all of a client's Service and/or Entry Exit history with alerts to notify the user when the client has multiple stays in the same time period at different providers. The report can also be used to determine the number of clients that return to the shelter within a certain time period, allowing the user to calculate the percentage of repeat clients within that time.

AUDIENCE:

For case managers to accurately maintain bedlists and length of stay counts. For agency administrators, executive directors, and stakeholders interested in limiting duplication errors and getting a picture of repeat clients.

FREQUENCY:

This report should be run as needed for data quality or general information. If desired, the report date prompts may be used to modify the date range for the current funding cycle.

PURPOSE:

Data Quality and historical overview of a clients Entry Exit and Service history within the reporting prompts.

COMPATIBILITY AND SYSTEM REQUIREMENTS

This version of the report requires ServicePoint 5x and ART 3x.

PREREQUISITES AND WORK FLOW REQUIREMENTS

This report assumes the use of either Entry Exit records or Service records. Records without an Exit Date or Service End Date will be included in the report.

INSTRUCTIONS:

Instruction on how to retrieve, copy, run, and read this report is outlined below. Requests for additional information concerning the report function/design should be directed to Bowman Systems' staff via email (ART_Reports@BowmanSystems.com).

How to retrieve and copy: Detailed step-by-step instructions concerning how to retrieve, save a copy, and map this ART Report to your site can be found in the Bowman Systems Published Documents folder under ART Documentations in you Public Folders.

How to install: The original version of the report is a template and must be copied from the ART Gallery Templates folder into another folder on your site and mapped to your data before it can be used. Detailed instructions for installing report templates are provided in the Bowman Documentation folder on your ART site.

Before running the report: Prior to running the report the user must determined the providers to be included in the report and a date range on which to base the results.

How to run:

Upon opening the report, the User will be prompted (see Diagram 1) to specify 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 selection has been made. The User should then single-click the “Run Query” button to generate the report. This report makes use of several optional prompts. If no value is selected for all three optional prompts the report will include every type of Service (Shelter and non-Shelter items) and every type of Entry Exit that occurred during the report date range.

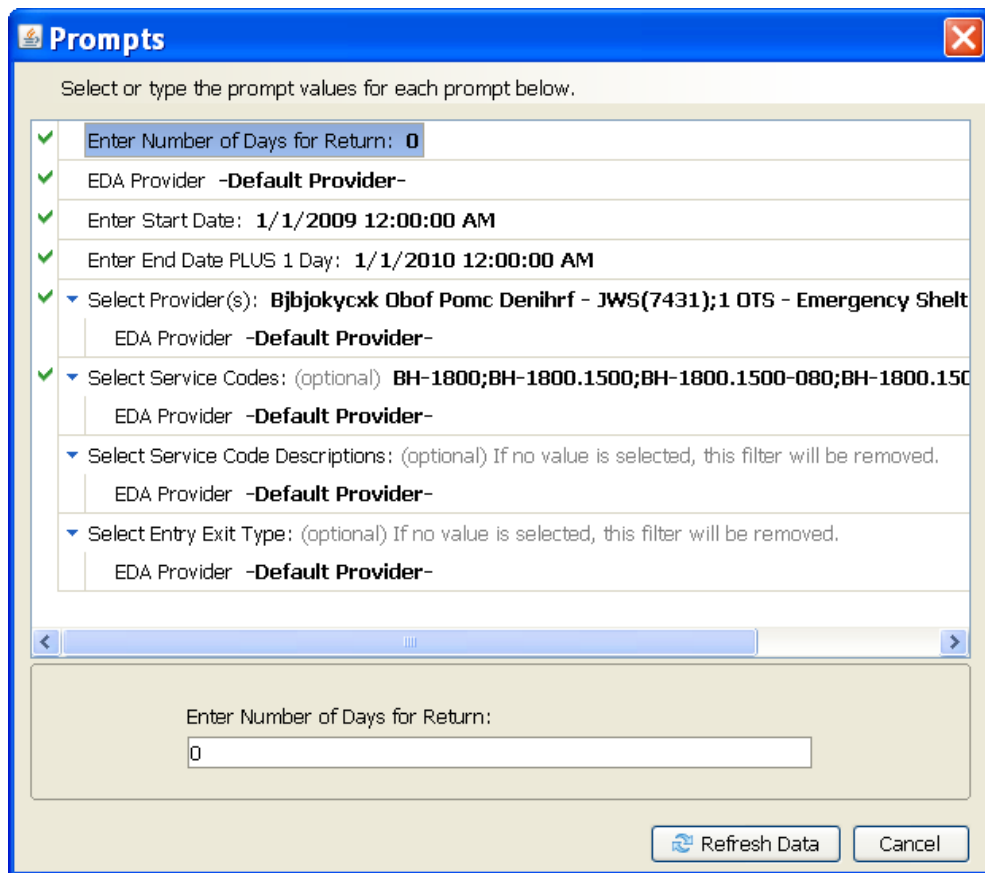


Diagram 1

The eight user prompts contained in this report are:

1. **Enter Number of Days for Return:** Enter the number of days for a client record to be considered a returning client. If you do not want to flag returning clients enter a value of 0.
2. **Enter Start Date:** The user should enter (or select from the calendar) the first date in the range of interest. Entry exits after this date and before the end date will be included in the report. The value selected is retained as the default for the next time the report is run.
3. **Enter End Date PLUS 1 Day:** The user should enter (or select from the calendar) one day after the last date the range of interest. Entry Exits before the end date and after the start date will be included in the report. The value selected is retained as the default for the next time the report is run.
4. **Select Provider(s):** Click the “refresh list” icon and wait for the left window to refresh. Now select the providers to include by highlighting them in the left window and moving them into the right window using the right selection arrow.
5. **Select Service Code (Optional):** Enter the AIRS taxonomy code of the service(s) to include in the report. Leaving this prompt blank will cause the report to ignore this prompt and pull in all Services regardless of their description that fall within the date range and provider prompt selections.
6. **Select Service Code Description (Optional):** Enter the AIRS taxonomy code description of the service(s) to include in the report. Leaving this prompt blank will cause the report to ignore this prompt and pull in all Services regardless of their description that fall within the date range and provider prompt selections.
7. **Select Entry Exit Type (Optional):** Enter the Entry Exit Type(s) to include in the report. Leaving this prompt blank will cause the report to ignore this prompt and pull in all Entry Exits regardless of their type that fall within the date range and provider prompt selections.

How to read: The report will contain two Tabs. Each Tab is a separate sub-report containing three sections:

- **Report Header:** The header contains the title of the report, and specifies any date parameters. When running the report in “modify” view, the report header is only visible in print/page layout mode.
- **Report Footer:** The report footer contains the title of the report, the name of the sub-report, the page number, the version number, and the date/time the report was run /printed. Like the header, the footer is only visible in print mode when the report is run in modify view.
- **Report Body:** The Report Body is the main section of the report located between the header and the footer where the reports data is displayed in a variety of different chart and graph formats. The data contained in each of the Tabs in this report are displayed and described below.

Tab A – Stays (Diagram 2): This tab contains a table that will highlight clients with particular data quality issues. The headers contain counts relevant to the columns dataset. Clients will have all relevant items that were selected in the prompts shown in this table. Services and Entry Exits within a Client record that fall within the Number of Days for Return prompt will have those relevant stays highlighted red. Service and Entry Exit records within a Client record that have overlapping dates will be highlighted blue.

Shelter - History, Overlap, and Return

Entry Exit or Service Stays

Report Dates: 1/1/09 - 12/31/09

Client Unique Id (2,035)	Client Id (2,035)	Provider	EE Id (9,072)	Start Date	End Date	Servie / EE Type	Stay	Overlap Return
aabm03181985a165m642	329001	1 EFC Pine Street Men's Drop-In Shelter (3373)	1838925	11/12/2009	12/03/2009	Community Shelters	Svs	R
		1 EFC Pine Street Men's Drop-In Shelter (3373)	1875836	12/04/2009	02/17/2010	Community Shelters	Svs	R
aafm04011984a140p620	324783	1 OTS - Emergency Shelter(5134)	298025	05/02/2009	05/05/2009	HUD	EE	O
		1 OTS - Emergency Shelter(5134)	1508925	05/02/2009	05/05/2009	Emergency Shelter	Svs	O
aakm02131982a535h480	383717	1 OTS - Emergency Shelter(5134)	326259	11/13/2009	01/19/2010	HUD	EE	O
		1 OTS - Emergency Shelter(5134)	1845842	11/13/2009	01/19/2010	Emergency Shelter	Svs	O
aarf07031981a420b420	184462	1 OTS - Emergency Shelter(5134)	317465	10/02/2009	10/09/2009	HUD	EE	O
		1 OTS - Emergency Shelter(5134)	1759082	10/02/2009	10/09/2009	Emergency Shelter	Svs	O
		1 OTS - Emergency Shelter(5134)	325480	11/11/2009	11/30/2009	HUD	EE	O
		1 OTS - Emergency Shelter(5134)	1837850	11/11/2009	11/30/2009	Emergency Shelter	Svs	O
abmm08141982a100s240	240123	1 EFC Pine Street Men's Drop-In Shelter (3373)	1641077	07/28/2009	07/29/2009	Community Shelters	Svs	
acbf11111994a350i152	331429	Bjbjokycxk Obof Pomc Denihrf - JWS (7431)	1549135	02/27/2009	05/28/2009	Emergency Shelter	Svs	R
		Bjbjokycxk Obof Pomc Denihrf - JWS (7431)	1549137	05/28/2009	05/29/2009	Emergency Shelter	Svs	R
		Bjbjokycxk Obof Pomc Denihrf - JWS (7431)	1831281	10/28/2009	10/30/2009	Emergency Shelter	Svs	

Diagram 2

- **Client Unique Id:** The column header counts all Client Unique Id's in the report range. The cells are merged, which means multiple rows of data for that client will only display one Client Unique Id.
- **Client Id:** The column header counts all Client Uid's in the report range. The cells are merged, which means multiple rows of data for that client will only display one Client Uid.
- **Provider:** The Provider of the Entry Exit or Service will be displayed in this column.
- **EE Id:** The Uid of either the Entry Exit or Service record will be displayed in this column. The header is a count of all Uid's in the report range.
- **Start Date:** Depending on the record type, either the Entry Exit Entry Date or the Service Provider Start Date will be displayed in this column.
- **End Date:** Depending on the record type, either the Entry Exit Exit Date or the Service Provider End Date will be displayed in this column.
- **Service / EE Type:** Depending on the record type, either the Entry Exit Type or the Service Code Description will be displayed in this column.
- **Stay:** Depending on the record type it will display **Svs** for Service records or **EE** for Entry Exit records.
- **Overlap/Return:** If a record has a Start Date that is within the Number of Days for Return prompt for the preceding record's End Date, both records will be marked with an R. If two or more records share date ranges that overlap, all affect records will be marked with an O. If a client has multiple lines and they overlap and have returns the overlap will show first. Data quality needs to be corrected (remove overlap) before the return will display in red.

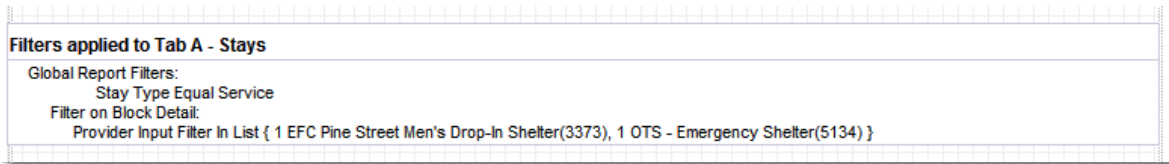


Diagram 3

- **Filters (Diagram 3):** At the end of Tab A there is a table that will list any Input Control filters currently applied to the report.
- **Dimensions used in Tab A:** Client ID, Client Unique ID, Service Code Description, Service Uid, Service Provide Start Date, Service Provide End Date, Service Provide Provider, Service Provided, and Right Now.

Tab A Input Controls (Diagram 4): This report makes use of the Input Control function for further filtering of report results.

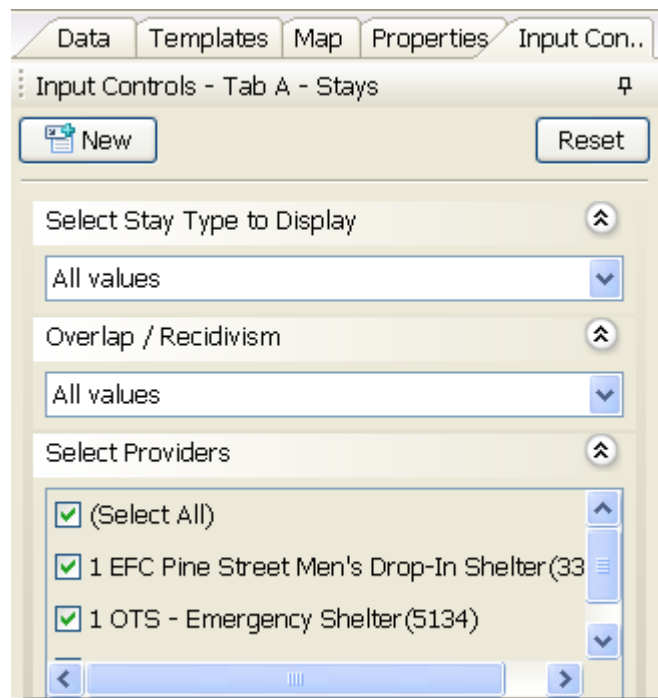


Diagram 4

- **Select Stay Type to Display:** Limits the data by either Entry Exits or Services.
- **Overlap / Recidivism:** Limits the data to either records that display only Returns / Overlap results, or all client records including those that are not Return/Overlaps.
- **Select Providers:** Limits the results of the report by one or more Providers.

Tab B – Additional Information (Diagram 5): This tab contains all prompt responses for the report along with a Client count by Provider.

Shelter - History, Overlap, and Return
Additional Information
Report Dates: 1/1/09 - 12/31/09

User Prompt Field:	Values Selected:
Enter Number of Days for Return:	3
Enter Start Date:	1/1/09
Enter End Date PLUS 1 Day:	1/1/10
Select Service Codes:	BH-1800; BH-1800.1500; BH-1800.1500-080; BH-1800.1500-100; BH-1800.1500-200; BH-1800.1500-700; BH-1800.1500-800; BH-1800.3500; BH-1800.8500; BH-1800.8500-100; BH-1800.8500-150; BH-1800.8500-170; BH-1800.8500-300; BH-1800.8500-500; BH-1800.8550; BH-1800.9000
Select Service Code Descriptions:	Transitional Housing/Shelter
Select Provider(s):	Bjbjokycxk Obof Pomc Denihrf - JWS(7431); 1 OTS - Emergency Shelter(5134); 1 EFC Pine Street Men's Drop-In Shelter(3373)
Select Entry Exit Type:	HUD
Providers Reporting Information:	Clients
1 EFC Pine Street Men's Drop-In Shelter(3373)	1,259
1 OTS - Emergency Shelter(5134)	762
Bjbjokycxk Obof Pomc Denihrf - JWS(7431)	27

Diagram 5

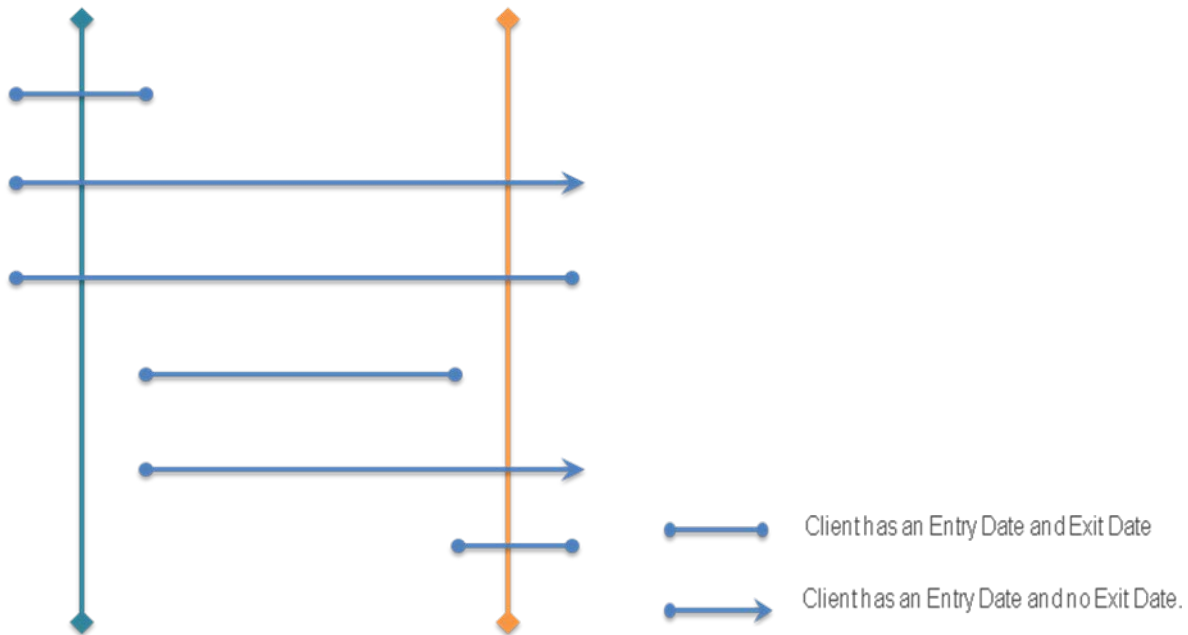
- **Client Count:** Client count is determined by the Client Unique ID and is broken down by Provider. All clients that are included in the report are totaled here. There is no breakdown of clients by Entry Exits or Services.
- **Dimensions used in Tab B:** Client Unique Id, Service Provide Provider.

TECHNICAL EXPOSITION

How the data is pulled: Clients are pulled into this report if they have an active Entry Exit and/or Service (depending on prompt selections) within the report date range and Provider selection. If a user selects picklist items from all three optional prompts, the report will filter based on those selections. Conversely, leaving the optional prompts blank will pull in every Entry Exit and Service type that occurred within the report range and at the report Provider. The chart below shows how clients can be included in the report based on their Entry Exit or Service dates.

Report Start Date:
07/01/2009 at
12:00:00 AM

Report End Date:
06/30/2010 at
11:59:59 PM



Stay Tab: In the Overlap/Return column, if a record has a Start Date that is within the Number of Days for Return prompt for the preceding record's End Date both records will be marked with an R. If two or more records share date ranges that overlap, all affect records will be marked with an O. In both instances there must be two or more records of Entry Exits or Services to be compared with. Records between different Providers within a Client record are also compared.

Programming notes, Stay Tab: Both tables pull data from the Combined Query Data.

- **Column Headers:** The report pulls both Entry Exit and Services, however the headers will default to Services.
- **Overlap/Return:** The Overlap variable will take priority over the Return variable. This means there may be instances where you are performing data quality and a record goes from Overlapping to Return.
- **Input Controls:** The Overlap/Recidivism control cannot limit the data to show only Overlaps only or Returns only. It either shows all clients in the report range or clients that have either/both Overlaps and Returns.
- There are Input Controls available to select only Entry Exits or Services. This control is based off of the Stay Type variable.

TECHNICAL NOTES:

1. Report counts are deduplicated by Client Unique ID. To find potential duplicate client IDs, refer to Tab E Data Quality.
2. Client's records at minimum must have either a Service or an Entry Exit to be included in the report.

MODIFICATION OPTIONS:

Modification is not recommended for this report.

MAPPING OBJECTS:

A listing of the report objects and their source universe and source folder is provided below. Objects are arranged by query and by object type.

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION
Provider Universe: provider_u (Provider Universe)	Result objects	Providers Provider Merge Id	Providers folder
	Filter object	Providers Provider Merge Id	Providers folder
		Providers Uid	Providers folder
BISData Universe: u (Client Universe)	Result objects	Client Uid	Clients folder
		Client Unique Id	Clients folder
		Service Uid	Clients / Services (Outer) folder
		Service Provide Provider	Clients / Services (Outer) folder
		Service Provide Start Date	Clients / Services (Outer) folder
		Service Provide End Date	Clients / Services (Outer) folder
		Service Code Description	Clients / Services (Outer) folder
		Service Provided	Clients / Services (Outer) folder
		Right Now	Clients / Date Objects / Right Now folder
		Entry Exit Uid	Clients / Entry Exit (Outer)/ folder
		Entry Exit Provider Id	Clients / Entry Exit (Outer)/ folder
		Entry Exit Entry Date	Clients / Entry Exit (Outer)/ folder
		Entry Exit Exit Date	Clients / Entry Exit (Outer)/ folder
		Entry Exit Type	Clients / Entry Exit (Outer)/ folder
	Entry Exit Inactive	Clients / Entry Exit (Outer)/ folder	
	Filter object	Client Inactive	Clients folder
		Service Inactive	Clients / Services (Outer) folder
Service Code		Clients / Services (Outer) folder	

Version	Description of Changes
V1	Original version –BETA
V1	(Doc Only) Revised user manual to reflect that if clients have multiple lines the Overlap shows first and needs to be corrected before a Return will display. Updated query 2 name to BISData.