

ART Gallery Report 0401

Client Program History

Case Management Report

EXECUTIVE SUMMARY:

This report is designed to allow the case worker to examine or print a client's program history as recorded in ServicePoint. The report contains a chronological summary of a client's program enrollment and service history as well as a more detailed display of each event. The report allows the user to specify a single client or a list of clients to include in the results. Event types contained in the report include: program entries, program exits, beginning of services and ends of services.

AUDIENCE:

Case workers and other staff involved directly with client records

FREQUENCY:

As needed

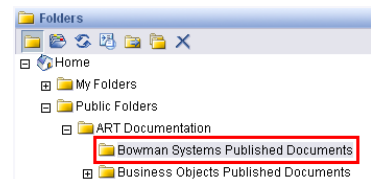
PURPOSE:

Report can be used to research a client's history, check data entry accuracy or print a client's history for paper file.

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 determine the clients to be included in the report

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.

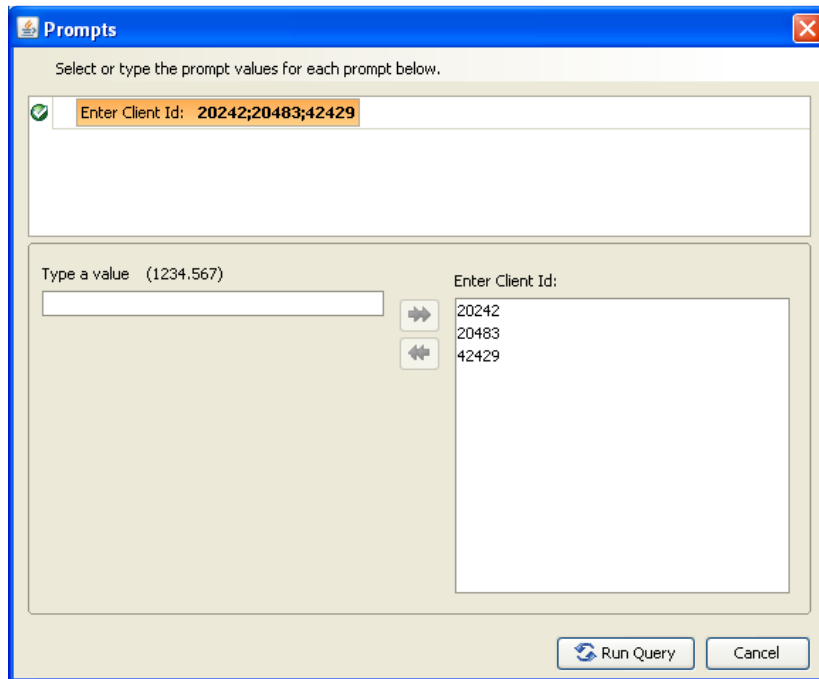


Diagram 1

The only user prompt contained in this report is:

1. **Enter Client Id:** The user should enter Client Id(s) to include by typing them in the left window and moving them into the right window using the right selection arrow.

How to read: The report will generally contain two or more 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 is displayed and described below:

Client Program History Transaction Detail						
Client Id: 42429		Gender: Female		Open EEs: 1		
Name: Lashun Fmylfddwyl		Race: (P): Black or African American (HUD)		Closed EEs: 4		
SSN: 245-81-3037		(S):		Open Svs: 1		
DOB (Age): 3/23/70 (40)		Ethnicity: Non-Hispanic/Non-Latino (HUD)		Closed Svs: 4		
Event Date	Event Type	Provider Name	Program Type	Details	Id	Date Range
11/19/98	Svs Start	Kglasj Kark spa ney Vnryluxi(1489)		Outreach Programs	37319	11/19/98 - 5/2/03
12/9/98	Svs Start	Nuuatfyek Aab0mpds(1545)		Basic Needs	29868	12/9/98 - 5/26/03
12/9/98	Svs Start	Nuuatfyek Aab0mpds(1545)		Basic Needs	29900	12/9/98 - 6/17/03
2/24/03	EE Entry	PHFFDVC(5091)		HUD-40118	25993	2/24/03 - 3/24/03
2/24/03	EE Entry	PHFFDVC(5091)		HUD-40118	25996	2/24/03 - 3/24/03
3/24/03	EE Exit	PHFFDVC(5091)		HUD-40118	25993	2/24/03 - 3/24/03
3/24/03	EE Exit	PHFFDVC(5091)		HUD-40118	25996	2/24/03 - 3/24/03
5/2/03	Svs End	Kglasj Kark spa ney Vnryluxi(1489)		Outreach Programs	37319	11/19/98 - 5/2/03
5/26/03	Svs End	Nuuatfyek Aab0mpds(1545)		Basic Needs	29868	12/9/98 - 5/26/03
6/17/03	Svs End	Nuuatfyek Aab0mpds(1545)		Basic Needs	29900	12/9/98 - 6/17/03
3/29/07	EE Entry	3-4-2@FADKMA(8220)	Other (HUD)	Quick Call	207080	3/29/07 - 3/29/07
3/29/07	EE Exit	3-4-2@FADKMA(8220)	Other (HUD)	Quick Call	207080	3/29/07 - 3/29/07
4/3/07	EE Entry	Uongtfoxc Ahhort XnmI Jbarbomcgh(8326)	Services Only program (HUD)	HUD-40118	212163	4/3/07 - 5/22/07
4/3/07	Svs Start	Uongtfoxc Ahhort XnmI Jbarbomcgh(8326)	Services Only program (HUD)	Case/Care Management	563335	4/3/07 - 5/21/07
5/21/07	Svs End	Uongtfoxc Ahhort XnmI Jbarbomcgh(8326)	Services Only program (HUD)	Case/Care Management	563335	4/3/07 - 5/21/07
5/22/07	EE Exit	Uongtfoxc Ahhort XnmI Jbarbomcgh(8326)	Services Only program (HUD)	HUD-40118	212163	4/3/07 - 5/22/07
6/24/09	EE Entry	Gobu Kqtwb no Uqbrwclj Navvnh0kojg Lontnun2691)	Transitional housing (HUD)	HUD-40118	301732	6/24/09 -
6/24/09	Svs Start	Gobu Kqtwb no Uqbrwclj Navvnh0kojg Lontnun2691)	Transitional housing (HUD)	Case/Care Management	1589182	6/24/09 -

Diagram 2

Tab A – Transaction Detail (Diagram 2): This tab displays a client’s identifying information at the top of the report and provides a chronological history of program related events including program entries, program exits, starts of a service and ends of a service. Event details include:

- **Program entries and exits:** event date, event type, program/provider name, program type, entry exit type, entry exit id, and date range of enrollment
- **Service starts and ends:** event date, event type, program/provider name, program type, service type, service id, and date range of service

Client Program History Additional Information

User Prompt Field	Value Selected
Enter Client Id:	20242; 20483; 42429

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Diagram 3

Tab B – Additional Information (Diagram 3): This tab is provided as a reference to the user running the report and lists the parameters specified in the user prompts.

TECHNICAL NOTES:

1. Inactive (deleted) transactions are not included in this report.
2. Because of the many data tables included in this report, the report may take several minutes to run, especially when multiple clients are specified.
3. When multiple clients are specified, the report is sectioned by client so that each client's record can be printed individually.

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 is a template and is retained in ART Gallery Templates folder structure. These template folders are read-only and any reports must be copied to a location in the user's site (Favorites or Public Folders) then mapped to the site's data.

MAPPING OBJECTS

UNIVERSE: template_event_u

This report is mapped to the event universe template_event_u and should be copied to your Public or Favorite folder then mapped to the equivalent event universe for your site (ex. *yoursite_event_u*). Mapping can be done from the first query EE.

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
EE	Event Id	Location: Events Type: System Field Use: Result Object
	Event Date	Location: Events Type: System Field Use: Result Object
	Event Type	Location: Events Type: System Field Use: Result Object
	Client Id	Location: Events Type: System Field Use: Result Object
	Client First Name	Location: Event Details / Client Type: System Field Use: Result Object
	Client Last Name	Location: Event Details / Client Type: System Field Use: Result Object
	Client Middle Name	Location: Event Details / Client Type: System Field Use: Result Object
	Client SSN	Location: Event Details / Client Type: System Field Use: Result Object
	Client Date of Birth	Location: Event Details / Client Type: System Field Use: Result Object
	Client Gender	Location: Event Details / Client Type: System Field Use: Result Object
	Client Primary Race	Location: Event Details / Client Type: System Field Use: Result Object
	Client Secondary Race	Location: Event Details / Client Type: System Field Use: Result Object
	Client Ethnicity	Location: Event Details / Client Type: System Field Use: Result Object

EE	Client Age (Current)	Location: Event Details / Client Type: System Field Use: Result Object
	Entry Exit Id	Location: Event Details / Entry Exit Type: System Field Use: Result Object
	Entry Exit Type	Location: Event Details / Entry Exit Type: System Field Use: Result Object
	Entry Exit Entry Date	Location: Event Details / Entry Exit Type: System Field Use: Result Object
	Entry Exit Exit Date	Location: Event Details / Entry Exit Type: System Field Use: Result Object
	Provider	Location: Event Details / Provider Type: System Field Use: Result Object
	Provider Program Type Code	Location: Event Details / Provider Type: System Field Use: Result Object
	Event Type is Program Entry	Location: Event Filters / Event Type Filters Type: System Field Use: Filter Object
	Event Type is Program Exit	Location: Event Filters / Event Type Filters Type: System Field Use: Filter Object

Svs	Event Id	Location: Events Type: System Field Use: Result Object
	Event Date	Location: Events Type: System Field Use: Result Object
	Event Type	Location: Events Type: System Field Use: Result Object
	Client Id	Location: Event Details / Client Type: System Field Use: Result Object
	Provider	Location: Event Details / Provider Type: System Field Use: Result Object
	Service Id	Location: Event Details / Service Type: System Field Use: Result Object
	Service Code	Location: Event Details / Service Type: System Field Use: Result Object
	Service Code Description	Location: Event Details / Service Type: System Field Use: Result Object
	Service Provide Start Date	Location: Event Details / Service Type: System Field Use: Result Object
	Service Provide End Date	Location: Event Details / Service Type: System Field Use: Result Object
	Service Provider Selected	Location: Event Details / Service Type: System Field Use: Result Object
	Provider Program Type Code	Location: Event Details / Provider Type: System Field Use: Result Object
	Event Type is Service Start	Location: Event Filters / Event Type Filters Type: System Field Use: Filter Object
	Event Type is Service End	Location: Event Filters / Event Type Filters Type: System Field Use: Filter Object