

ART Gallery Report 0408

Client Living Situation History

Case Management Report

EXECUTIVE SUMMARY:

This report is designed to allow the case worker to examine and reconstruct a history of client's living situation over an extended period of time. The report utilizes a variety of information from the clients ServicePoint records to construct a chronological history of the client's living situation over time. Events used in constructing this history include: residential program entries and exits; shelter type services; pre-entry prior living situation, and exit destinations. The report allows the user to specify a single client or a list of clients to include in the results.

AUDIENCE:

Case workers and other staff involved directly with client records

FREQUENCY:

As needed

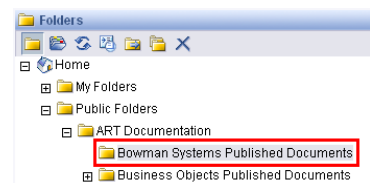
PURPOSE:

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 your 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 client(s) 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.

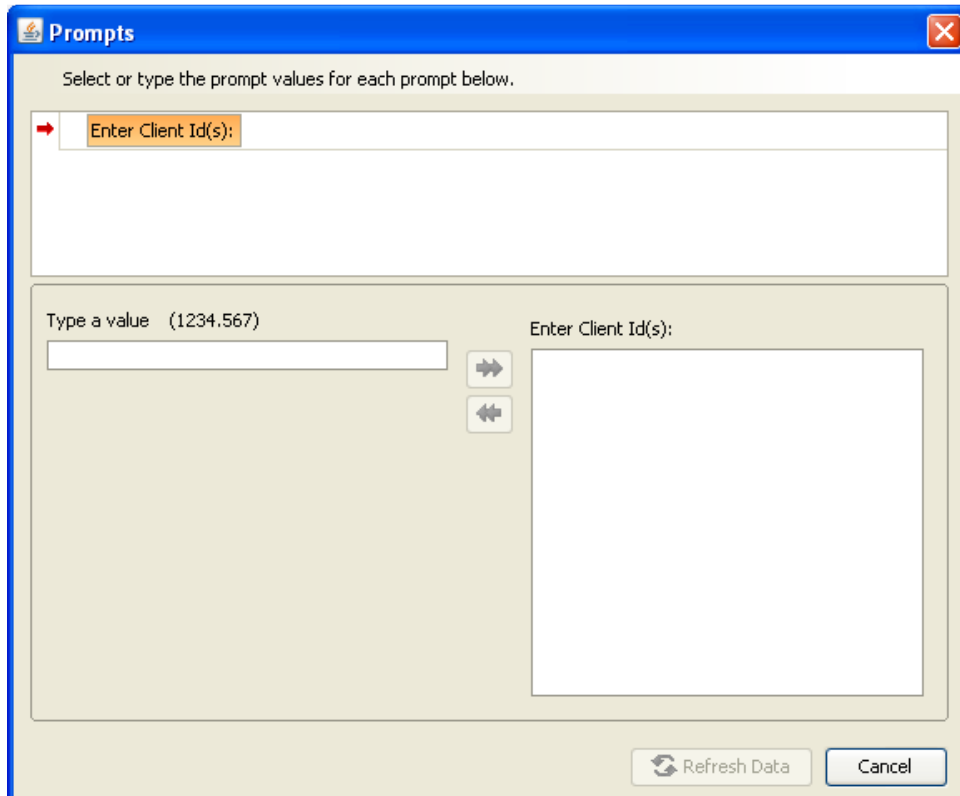


Diagram 1

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 contains 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 Living Situation History				
History of Living Situation				
Client ID: 75121		Gender: Male		
Name: Rodrick R Ogal		Race: (P) Black or African American (HUD)		
SSN: 582-89-0284		Race: (S)		
DOB (Age): 4/25/74 (35)		Ethnicity: Non-Hispanic/Non-Latino (HUD)		
Ref Id	Start Date	End Date	Living Situation / Location	Data Source
74,637	2/21/04	????	Don't Know (HUD)	Exit Destination
345,887	????	4/30/04	Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)	Prior Living Situation
168,895	5/30/06	????	Don't Know (HUD)	Exit Destination
182,810	5/30/06	????	Other (HUD)	Exit Destination
167,297	5/30/06	9/19/06	Emergency Shelter (HUD)	Residential Program Enrollment
295,637	5/30/06	9/19/06	Emergency Shelter (HUD)	Shelter Enrollment
452,178	????	5/31/06	Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)	Prior Living Situation
438,546	????	9/19/06	Staying or living in a friend's room, apartment or house (HUD)	Prior Living Situation
228,330	9/9/07	????	Don't Know (HUD)	Exit Destination
230,797	9/9/07	9/25/07	Emergency Shelter (HUD)	Residential Program Enrollment
728,519	9/9/07	9/25/07	Emergency Shelter (HUD)	Shelter Enrollment
496,894	????	9/25/07	Staying or living in a friend's room, apartment or house (HUD)	Prior Living Situation
780,947	11/23/07	12/17/07	Emergency Shelter (HUD)	Shelter Enrollment
274,343	10/27/08	????	Rental room/house/apartment	Exit Destination
1,240,299	10/27/08	10/31/08	Emergency Shelter (HUD)	Shelter Enrollment
279,262	10/27/08	11/15/08	Emergency Shelter (HUD)	Residential Program Enrollment
540,009	????	11/15/08	Staying or living in a friend's room, apartment or house (HUD)	Prior Living Situation
1,492,094	4/22/09	5/13/09	Emergency Shelter (HUD)	Shelter Enrollment

Diagram 2

Tab A –History of Living Situation (Diagram 2): This tab contains a chronological history of the client’s living situation over time based upon events recorded in ServicePoint including: residential program entries and exits; shelter type services; pre-entry prior living situation; and exit destinations. The manner in which this information is processed is described in Technical Note #3 below.

Client Living Situation History Residential Program Enrollment

Client ID: 75121 Name: Rodrick R Ogal

Ref ID	Start Date	End Date	Provider	Program Type	Entry Exit Type
167297	5/30/06	9/19/06	RCEU, Bwp.(7773)	Emergency Shelter (HUD)	HUD-40115
230797	9/9/07	9/25/07	RCEU, Bwp.(7773)	Emergency Shelter (HUD)	HUD-40115
279282	10/27/08	11/15/08	RCEU, Bwp.(7773)	Emergency Shelter (HUD)	HUD-40115

Diagram 3

Tab B –Residential Program Enrollment (Diagram 3): This tab contains detail information related to the client’s program enrollments contained in Tab A.

Client Living Situation History Exit Destination

Client Id: 75121 Name: Rodrick R Cgall

Ref Id	Exit Date	Provider	Exit Destination
74837	2/21/04	Q.S.D.N. (Hhrrng Aawrdlx Sltbrng Qyrybka) Fortuk(7532)	Don't Know (HUD)
188855	5/30/08	RCEU, Bwp.(7773)	Don't Know (HUD)
182810	5/30/08	OGY FRN PECOP Fy) (7432)	Other (HUD)
228330	6/30/07	RCEU, Bwp.(7773)	Don't Know (HUD)
274343	10/27/06	RCEU, Bwp.(7773)	Rental roomhouse/apartment

Diagram 4

Tab C –Exit Destination (Diagram 4): This tab contains detail information related to the client’s exit destinations used in Tab A.

Client Living Situation History Prior Living Situation

Client Id: 75121 Name: Rodrik R Ogasal

Ref Id	Entry Date	Provider	Prior Living Situation
345587	4/20/04	Q.S.D.N. (Hiring Aauzdik Sibunq Gysyblwa) Fortuk(7532)	Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)
438548	9/19/05	RCEU, Bwp.(7773)	Staying or living in a friend's room, apartment or house (HUD)
452178	5/31/05	OGY FRN PEOP Fy(7432)	Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)
496894	9/25/07	RCEU, Bwp.(7773)	Staying or living in a friend's room, apartment or house (HUD)
540509	11/15/08	RCEU, Bwp.(7773)	Staying or living in a friend's room, apartment or house (HUD)

Diagram 5

Tab D –Prior Living Situation (Diagram 5): This tab contains detail information related to the client’s prior living situations used in Tab A.

Client Living Situation History Shelter Enrollment

Client Id: 75121 Name: Rodrick R Cgall

Ref Id	Start Date	End Date	Provider	Program Type	Service Code
295837	5/30/06	9/19/06	MWNY, Tgj - Armb Wideaps - RUM(7774)	Emergency Shelter (HUD)	Emergency Shelter
728519	9/9/07	9/25/07	MWNY, Tgj - Armb Wideaps - RUM(7774)	Emergency Shelter (HUD)	Emergency Shelter
790947	11/23/07	12/17/07	MWNY, Tgj - Armb Wideaps - RUM(7774)	Emergency Shelter (HUD)	Emergency Shelter
1240299	10/27/08	10/31/08	MWNY, Tgj - Armb Wideaps - RUM(7774)	Emergency Shelter (HUD)	Emergency Shelter
1492094	4/22/09	5/13/09	MWNY, Tgj - Armb Wideaps - RUM(7774)	Emergency Shelter (HUD)	Emergency Shelter

Diagram 6

Tab E –Shelter Enrollment (Diagram 6): This tab contains detail information related to the client’s shelter services used in Tab A.

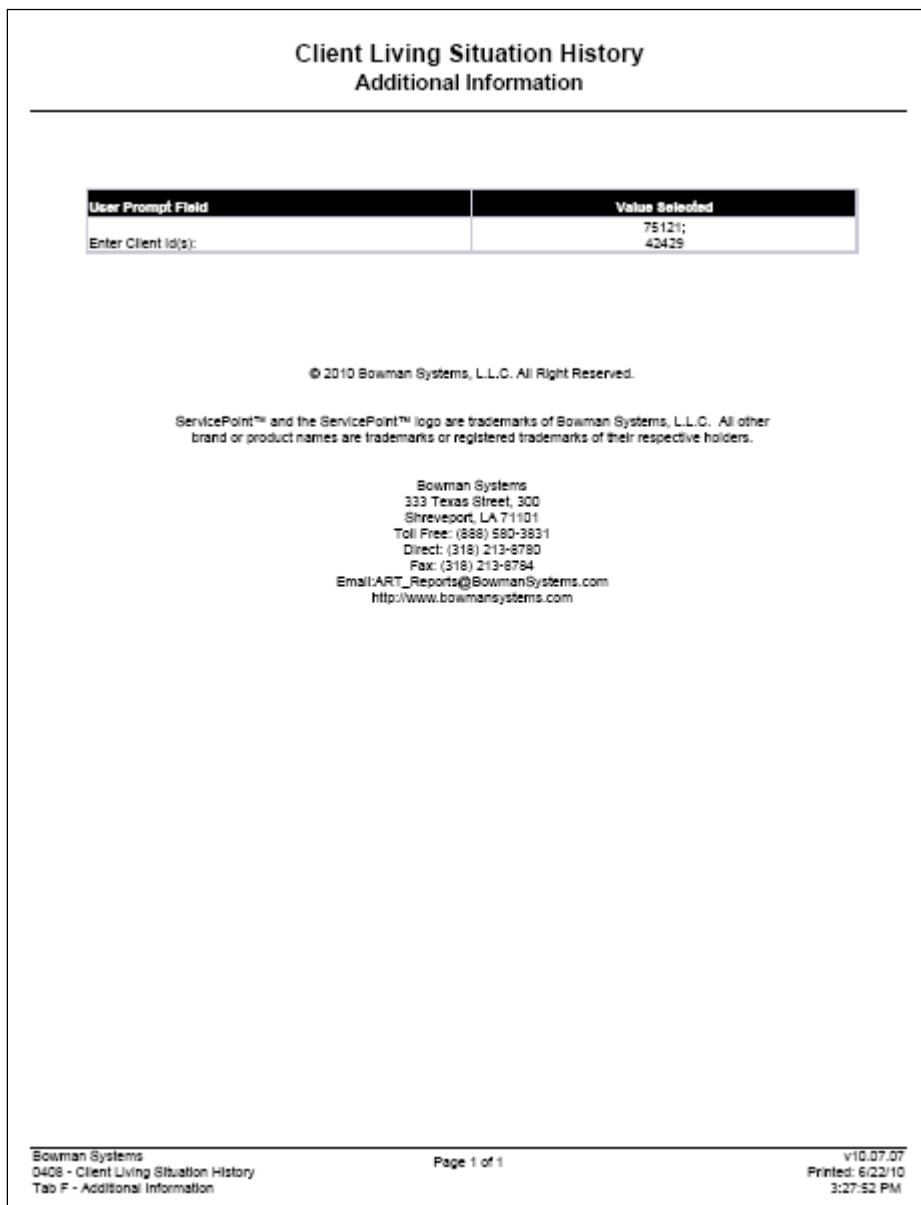


Diagram 7

Tab F – Additional Information (Diagram 7): 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) The construction of the living situation history contained in this report is based on the combination of several data elements as described above. The manner in which these elements are used in the construction is as follows:

- In the case of residential program enrollment, the living situation is determined by the program’s program type code and the dates displayed in the start and end columns reflect the entry and exit dates. If there is no exit, then “???” is displayed in the end date column.
- In the case of residential services, the living situation is determined by the service code description and the dates displayed in the start and end columns reflect the service start and end dates. If there is no service end date, then “???” is displayed in the end date column.
- When the living situation is based on client’s recorded prior living situation at time of entry, only the end date is displayed, and is based on the entry date. Since there is no means of determining when this prior living situation began, “???” is displayed in the start date column.
- When the living situation is based on client’s recorded exit destination, only the start date is displayed, and is based on the exit date. Since there is no means of determining when this destination ended, “???” is displayed in the end date column.

4) It should be noted that in cases where a program’s workflows involves the recording of both and entry exit and a shelter services that the reports will display redundant data as shown in diagram 8 below:

Ref Id	Start Date	End Date	Living Situation / Location	Data Source
74837	???	2/21/04	Don't Know (HUD)	Prior Living Situation
345859	4/30/04	???	Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)	Exit Destination
168855	???	5/30/06	Don't Know (HUD)	Prior Living Situation
182610	???	5/30/06	Other (HUD)	Prior Living Situation
167297	5/30/06	9/19/06	Emergency Shelter (HUD)	Residential Program Enrollment
295637	5/30/06	9/19/06	Emergency Shelter (HUD)	Shelter Enrollment
452150	5/31/06	???	Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)	Exit Destination
438518	9/19/06	???	Staying or living in a friend's room, apartment or house (HUD)	Exit Destination
???	???	???	Don't Know (HUD)	Prior Living Situation

Diagram 8

If desired, the report can be easily modified to disregard either program enrollments or shelter services, by removing the first or the fourth query and the corresponding report tab.

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

UNIVERSES: template_client_event_u
 template_ee_u
 template_u

This report is mapped to the event universe (template_client_event_u), entry exit universe (template_ee_u), and client universe (template_u) and should be copied to your Public or Favorite folder then mapped to the equivalent event universes for your site (ex. *yoursite_client_event_u*). Mapping for the entry exit universe can be done from the first query Res. Mapping for the event universe can be done from the second query Exit Dest. Mapping for the client universe can be done from the last query Shelter.

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
Res	Client Uid	Location: Entry Exit / Clients Type: System Field Use: Result Object
	Entry Exit Uid	Location: Entry Exit Type: System Field Use: Result Object
	Entry Exit Entry Date	Location: Entry Exit Type: System Field Use: Result Object
	Entry Exit Exit Date	Location: Entry Exit Type: System Field Use: Result Object
	Entry Exit Provider Id	Location: Entry Exit Type: System Field Use: Result Object
	Entry Exit Provider Program Type	Location: Entry Exit / Entry Exit Provider Id Type: System Field Use: Result Object
	Entry Exit Type	Location: Entry Exit Type: System Field Use: Result Object
	Client Inactive	Location: Entry Exit / Clients Type: System Field Use: Filter Object
	Entry Exit Inactive	Location: Entry Exit Type: System Field Use: Filter Object

PLS	Client Id	Location: Event Details / Client Type: System Field Use: Result Object
	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
	Provider	Location: Event Details / Provider Type: System Field Use: Result Object
	Type of Living Situation(TYPEOFLIVINGSITUATION)	Location: Event Details / Assessments / HUD-40118(HUD40118) 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
	Client Age (Current)	Location: Event Details / Client Type: System Field Use: Result Object
	Event Type is Program Entry	Location: Event Filters / Event Type Filters Type: System Field Use: Filter Object

Exit Dest	Client Id	Location: Event Details / Client Type: System Field Use: Result Object
	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
	Provider	Location: Event Details / Provider Type: System Field Use: Result Object
	Entry Exit Destination	Location: Event Details / Entry Exit Type: System Field Use: Result Object
	Event Type is Program Exit	Location: Event Filters / Event Type Filters Type: System Field Use: Filter Object
Shelter	Client Uid	Location: Clients Type: System Field Use: Result Object
	Service Uid	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Service Provider Start Date	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Service Provide End Date	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Service Provide Provider	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Service Provide Provider Program Type Code	Location: Clients / Services (Outer) / Service Provide Provider Type: System Field Use: Result Object
	Service Shelter Item	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Service Code Description	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Service Code	Location: Clients / Services (Outer) Type: System Field Use: Result Object
	Client Inactive	Location: Entry Exit / Clients Type: System Field Use: Filter Object
	Service Inactive	Location: Clients / Services (Outer)

		Type: System Field Use: Filter Object
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