

# **ART Gallery Report 0412**

## **HPRP Financial Assistance Monitor**

### **Case Management Report**

#### **EXECUTIVE SUMMARY:**

This ART Gallery report is designed to assist case managers and other program staff in monitoring the length of time that a client has been receiving HPRP financial assistance. A visual color coded display identifies clients who are nearing (orange) their 18 month assistance limit, as well as those (red) who have exceeded it. The report can be configured to monitor clients serviced by a single provider or multiple providers. The report can also be used to identify clients with incomplete service records by identifying service transactions without end dates or one with missing financial assistance end dates.

#### **AUDIENCE:**

Case managers or other program staff working with HPRP grants.

#### **FREQUENCY:**

This report should be run monthly or as needed to insure that clients are not exceeding the 18 month limit of HPRP financial assistance.

#### **PURPOSE:**

This report is useful both as a case management tool and as a data quality tool for HPRP grantees and sub-grantees.

#### **COMPATIBILITY AND SYSTEM REQUIREMENTS**

This report requires ServicePoint 5x and ART 3x.

#### **PREREQUISITES AND WORK FLOW REQUIREMENTS**

Adherence to the proscribed HPRP workflow and the proper collection and recording of the HPRP financial assistance services is required. The report can be used with workflows that:

- utilize the “HPRP Financial Assistance Start Date”/ “HPRP Financial Assistance End Date”
- which rely entirely on the “Service Provide Start Date” / “Service Provide End Date”
- utilize a combination of the two.

## INSTRUCTIONS:

Instructions are outlined below concerning how to retrieve, copy, run, and read this report. Requests for additional information concerning the report function/design should be directed to Bowman Systems' staff via email ([ART\\_Reports@BowmanSystems.com](mailto: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 in the ART Documentation section.

**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 have access to the list of ServicePoint providers included in the grant, the grant start date and the starting and ending dates for the current reporting period.

### 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 "Refresh Data" button to generate the report.

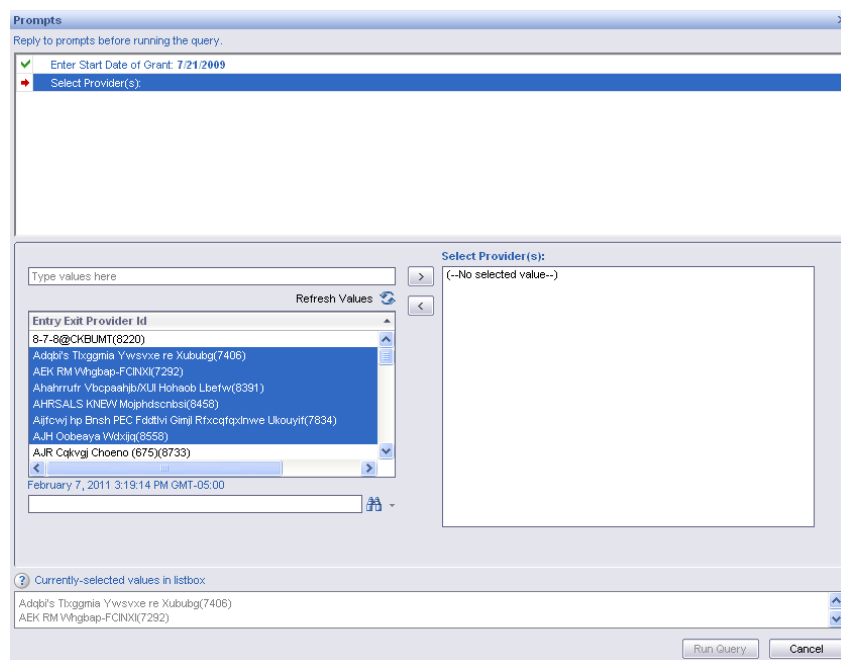


Diagram 1

The two user prompts contained in this report are:

1. **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.
2. **Enter Start Date of Grant:** The user should type in, or select from the calendar, the first day of the HPRP grant.

**How to read:** This report contains three data tabs. Each tab is a sub-report containing three sections:

- **Report Header:** The header contains the title of the report and the tab/sub-report. 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 tab/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 formats. The data contained in each of the tabs in this report is displayed and described below:

# HPRP Financial Assistance Monitor Summary

## Length of Financial Assistance by Client



Client Uid	Client First Name	Client Last Name	Start of Client's Financial Assistance	End of Client's Financial Assistance	Months of Financial Assistance To Date	Provider / Program
192	Barbara	Ucwoodsq	12/2/09	10/1/10	9.95	Oyxb ar Naiyqoyat JBLU(8645)
5554	Preston	Pbs	12/21/09	12/21/09	0	Oyxb ar Naiyqoyat JBLU(8645)
10891	Azahria	Bwefdv	8/3/10	8/3/10	0	Oyxb ar Naiyqoyat JBLU(8645)
17431	Brett	Vnymomgaj	1/8/10	1/31/10	0.76	Bbmsewamnl MIRP(8601)
19286	Nyteria	Opkhd	9/20/10	on-going	4.67	Oyxb ar Naiyqoyat JBLU(8645)
23543	Tyran	Cgig	1/8/10	10/1/10	8.8	Oyxb ar Naiyqoyat JBLU(8645)
24036	Nancy	Cbppubj	3/18/10	10/1/10	6.47	Oyxb ar Naiyqoyat JBLU(8645)
26475	Lesha	Cfirwmqb	9/1/10	9/1/10	0	Oyxb ar Naiyqoyat JBLU(8645)
26513	Bobbie	Yokaq	4/20/10	10/1/10	5.39	Oyxb ar Naiyqoyat JBLU(8645)
26870	Davonte	Kbec	10/29/09	10/29/09	0	Oyxb ar Naiyqoyat JBLU(8645)
27670	Rose	Lvuf	10/29/09	10/29/09	0	Oyxb ar Naiyqoyat JBLU(8645)
29237	Lynn	Jkhrpboxa	11/25/09	10/1/10	10.18	Oyxb ar Naiyqoyat JBLU(8645)
29755	Lisa	Exlho	5/1/10	6/30/10	1.97	Oyxb ar Naiyqoyat JBLU(8645)
31347	Shemonda	Oixpo	10/11/10	10/18/10	0.23	Oyxb ar Naiyqoyat JBLU(8645)
31409	Marsha	Bubxbtttd	11/1/09	9/1/10	9.99	Oyxb ar Naiyqoyat JBLU(8645)
32483	Laura	llskbjja	7/1/10	10/1/10	3.02	Oyxb ar Naiyqoyat JBLU(8645)
32713	Tonora	Jsyib	7/30/10	7/30/10	0	Oyxb ar Naiyqoyat JBLU(8645)
33390	Yazmin	Jdbif	6/1/10	10/1/10	4.01	Oyxb ar Naiyqoyat JBLU(8645)
34542	Laqurita	lpqbnp	2/11/10	7/31/10	5.59	Bbmsewamnl MIRP(8601)
34570	Damion	Fnveunqk	7/1/10	10/1/10	3.02	Oyxb ar Naiyqoyat JBLU(8645)
34575	Ch'ree	Xjffxjai	7/1/10	10/1/10	3.02	Oyxb ar Naiyqoyat JBLU(8645)
34753	Alexander	Ekymgauqx	7/1/10	10/1/10	3.02	Oyxb ar Naiyqoyat JBLU(8645)
36047	Catherine	lqn	10/23/09	10/23/09	0	Oyxb ar Naiyqoyat JBLU(8645)
37451	Angela	Gvdnuvec	11/18/09	10/1/10	10.41	Oyxb ar Naiyqoyat JBLU(8645)
37452	Robert	Umgjvw	11/18/09	10/1/10	10.41	Oyxb ar Naiyqoyat JBLU(8645)
37860	Lakila	Utqbmpv	10/28/10	10/28/10	0	Oyxb ar Naiyqoyat JBLU(8645)
38119	Monica	Iyenubd	2/11/10	10/1/10	7.62	Oyxb ar Naiyqoyat JBLU(8645)
38151	Jawanza	Fwmn	10/28/10	10/28/10	0	Oyxb ar Naiyqoyat JBLU(8645)
39495	Lizbeth	Tytabop	9/14/10	9/14/10	0	Oyxb ar Naiyqoyat JBLU(8645)
45135	MICHAEL	PCUDVW	3/18/10	3/18/10	0	Oyxb ar Naiyqoyat JBLU(8645)
45300	Lorraine	Rioisq	10/15/10	10/15/10	0	Oyxb ar Naiyqoyat JBLU(8645)
46189	Shervon	Gkphbmrl	9/21/10	9/21/10	0	Oyxb ar Naiyqoyat JBLU(8645)
47273	Lonzetta	Qeqboo	9/1/10	10/1/10	0.99	Oyxb ar Naiyqoyat JBLU(8645)
47865	Raynal	Ocjvt	11/4/09	9/1/10	9.89	Oyxb ar Naiyqoyat JBLU(8645)
48732	Bobbi	Sjihuw	11/13/09	11/29/09	0.56	Bbmsewamnl MIRP(8601)
50262	Devonte	Vqaou	10/11/10	10/18/10	0.23	Oyxb ar Naiyqoyat JBLU(8645)
50263	Dashanay	Ljfak	10/11/10	10/18/10	0.23	Oyxb ar Naiyqoyat JBLU(8645)
50264	Davarius	Xreyu	10/11/10	10/18/10	0.23	Oyxb ar Naiyqoyat JBLU(8645)
50717	Anjanine	Girrm	9/10/10	9/10/10	0	Oyxb ar Naiyqoyat JBLU(8645)
53406	Tautiana	Yangbe	10/15/10	10/15/10	0	Oyxb ar Naiyqoyat JBLU(8645)
59942	James	Xmfp	12/2/09	10/1/10	9.95	Oyxb ar Naiyqoyat JBLU(8645)
59943	Wesley	Yevh	12/2/09	10/1/10	9.95	Oyxb ar Naiyqoyat JBLU(8645)

Diagram 2

**Tab A – Summary (Diagram 2):** This tab provides a listing of clients who have been served grant-to-date along with a calculation for their earliest financial assistance transaction, their most recent financial assistance transaction, and the number of months in between. Column 6, which displays the duration in months is color coded to provide a visual cue to the user, and allow easy identification of clients nearing or exceeding their 18 month support limit. Color coding is as follows:



Tab A is also equipped with input controls that allow the user to quickly toggle the results between service providers and/or to identify clients of a specified funding duration (such as 14-18 month range for example). These input controls provide instant filtering and can be used separately or in tandem with each other.

HPRP Financial Assistance Monitor													
Detail and Data Quality													
Financial Assistance Program and Service Data													
UId	EE UId	Entry Date	Exit Date	Srv UId	FA \$ Type	Provider/Program	Srv Start	Srv End	Start	FA \$ End	\$START	\$END	FA \$ Months
401042	362312	5/28/10	6/3/10	2223288	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/3/10	6/3/10	6/3/10	missing	6/3/10	6/3/10	0
401060	362357	5/21/10	5/25/10	2223447	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	5/26/10	5/26/10	5/26/10	missing	5/26/10	5/26/10	0
401292	370745	7/29/10	10/29/10	2308881	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	7/29/10	7/29/10	4/1/09	missing	4/1/09	10/29/10	18.92
				2308882			7/29/10	7/29/10	5/1/09	missing			
				2308883			7/29/10	7/29/10	6/1/09	missing			
				2308884			7/29/10	7/29/10	7/1/09	missing			
				2392932			9/15/10	9/15/10					
				2443819			10/14/10	10/14/10					
				2478514	8/16/10	8/16/10							
401292	370745	7/29/10	10/29/10	2339624	Security deposits	Oyxb ar Nalyqoyat JBLU(86)	8/16/10	8/16/10			4/1/09	10/29/10	18.92
401292	370745	7/29/10	10/29/10	2415404	Utility payments	Oyxb ar Nalyqoyat JBLU(86)	9/29/10	9/29/10			4/1/09	10/29/10	18.92
401292	392177	11/15/10		2499796	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	11/15/10	11/15/10	11/1/10		4/1/09	2/9/11	22.28
401297	362561	6/2/10	6/16/10	2225028	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/2/10	6/2/10	6/3/10	missing	6/2/10	6/16/10	0.46
401332	362562	6/2/10	6/16/10	2225024	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/2/10	6/2/10	6/3/10	missing	6/2/10	6/16/10	0.46
401337	362565	6/2/10	6/16/10	2225027	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/2/10	6/2/10	6/3/10	missing	6/2/10	6/16/10	0.46
401343	362563	6/2/10	6/16/10	2225025	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/2/10	6/2/10	6/3/10	missing	6/2/10	6/16/10	0.46
401355	362564	6/2/10	6/16/10	2225026	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/2/10	6/2/10	6/3/10	missing	6/2/10	6/16/10	0.46
401722	362917	6/4/10	6/15/10	2227999	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/4/10	6/4/10	6/15/10	missing	6/4/10	6/15/10	0.36
401731	362918	6/4/10	6/15/10	2227997	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/4/10	6/4/10	6/15/10	missing	6/4/10	6/15/10	0.36
401732	362919	6/4/10	6/15/10	2227998	Rental assistance	Oyxb ar Nalyqoyat JBLU(86)	6/4/10	6/4/10	6/15/10	missing	6/4/10	6/15/10	0.36

Diagram 3

**Tab B – Detail and Data Quality (Diagram 3):** This tab provides the program enrolment and service detail relative to the client’s financial assistance. Like Tab A, this report also includes the color coded

alerters connected with the duration of the clients financial support. (Columns 12-14 are color coded).) The client service records are grouped in conjunction with the client's program enrollment period and clients with multiple enrollments (entry-exits) are highlighted for easy identification. In this case the Entry Exit Uid is displayed on a yellow background as shown in Diagram 3. The cases where the client has exited the program, any null service end dates are identified as missing. Any financial assistance starts without financial assistance ends are also flagged as missing giving the report extra value as a data quality monitoring tool.

Like Tab A, this report is also enhanced with input controls. In addition to the Provider/Program filter and the length of assistance filters included in Tab A, this report has an additional input control which allows the end user to quickly filter by a single client or by a group of clients. (see Diagram 4). As is Tab A, these input filters can be used independently or in tandem with each other.

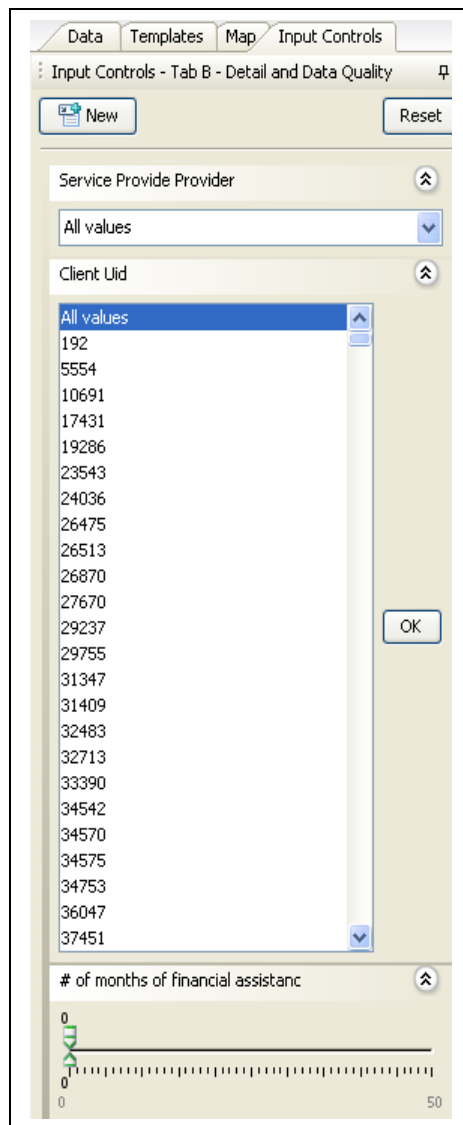


Diagram 4

## HPRP Financial Assistance Monitor Length of Financial Assistance Additional Information

User Prompt Field	Value(s) Selected
Enter Start Date of Grant:	7/30/09
Select Provider(s):	Bbmsewamnl MIRP(8601); Oyxb ar Naiyqoyat JBLU(8645)

Providers Reporting Information	Unique Client Count	Client Count
Bbmsewamnl MIRP(8601)	829	829
Oyxb ar Naiyqoyat JBLU(8645)	1,595	1,595

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**Diagram 5**

**Tab C – Additional Information (Diagram 5):** This tab is provided as a reference to the user running the report and lists the parameters specified in the user prompts, as well as client counts by provider:

- “Client Count” represents the number of clients served during the reporting period.
- “Unique Clients” is the Client Count de-duplicated using the Client Unique Id algorithm.

## TECHNICAL NOTES

1. **Inclusion:** This report pulls data in conjunction with HPRP eligibility/reporting criteria, so that the clients contained in this report will be a subset of those included in the HPRP APR (#0624) and the HPRP QPR (#0610). This report however excludes clients who receive only Housing Relocation and Stabilization Services and not Financial Assistance services. This report also does not distinguish between clients served during a Reporting Period and Grant-To-Date period but rather includes all HPRP clients who received Financial Assistance during the grant period.
2. **Calculation of Duration:** In calculating the length of time the client received assistance this report identified a starting point and ending point and measures the amount of time between the two. The logic used in determining the starting and ending points is described below. It should be noted that this report does not attempt to adjust the length of duration by excluding gaps in assistance that may have occurred.

**NOTE:** Grantees using alternative methods for calculating the duration of assistance, which adjusts for gaps in coverage, are advised to seek HUD guidance on proper methodology.

3. **Calculating the Start of the Financial Assistance Period:** The beginning of the client's financial assistance period is calculated by taking the earliest financial assistance service transaction start date, or their earliest financial assistance start date, depending on which indicates the earliest date.
4. **Calculating the End of the Financial Assistance Period:** The methodology used takes a number of fields into consideration and is a four step process:
  - a. If the client has not exited the program, and has an un-ended financial assistance service transaction, or has a financial assistance start date without an end date, then the financial assistance is considered to be still in progress , and the current date is used to calculate the end point of the financial assistance period.
  - b. If the client has exited the program, and has an un-ended financial assistance service transaction, or has a financial assistance start date without an end date, then the program exit date is used to calculate the end point of the financial assistance period.
  - c. If all of the client's financial assistance service transactions have recorded end dates and are not accompanied by financial assistance start dates /end dates, then the most recent service transaction end date is used to calculate the end point of the financial assistance period.
  - d. If all of the client's financial assistance service transactions have recorded end dates and some or all are accompanied by financial assistance start dates with end dates, then either the most recent service transaction end date or the most recent financial assistance end date used to calculate the end point of the financial assistance period, depending upon which is most recent.



5. **Input Controls:** Input controls are intended to be used in combination with each other to isolate desired data subsets, however not all combinations are possible, and certain combinations may result in a “COMPUTATION” error message. If/when such a message is encountered, all of the input filters for that report should be reset to the “All Values” default setting at which point the error message will disappear and the full data set will again be visible.
6. **Export to Excel:** When exporting this report to Excel, some of the date fields may lose their proper formatting and appear as a time rather than a date in the Excel Spreadsheet. This can be corrected by reformatting these cells in Excel.

## REPORT MODIFICATION

Experienced Ad Hoc users may choose to modify this report by including additional user prompts, input controls, data fields, sub-reports, display options, etc, however altered versions of this report may not be supported.

## DATA MAPPING GUIDE

UNIVERSE: [template\_ee\_u]

This report is mapped to the entry-exit universe ([template\_ee\_u]) and should be copied to your Public or Favorite folder then mapped to the equivalent entry-exit universe for your site (ex. *yoursite\_ee\_u*). Mapping can be done from the first query ([data]).

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE
	Client Uid	Location: Client Type: System Field Use: Results object
	Entry Exit Uid	Location: En try Exit Type: System Field Use: Results object
	Entry Exit Entry Date	Location: En try Exit Type: System Field Use: Results object
	Entry Exit Provider Id	Location: En try Exit Type: System Field Use: Sub-query filter/ Results object
	Service Uid	Location: Services (Outer) Type: System Field Use: Sub-query filter / Results object

data	Service HPRP Financial Assistance Type	Location: Services (Outer) Type: System Field Use: Sub-query filter / Results object
	Client Unique Id	Location: Client Type: System Field Use: Results object
	Entry Exit Exit Date	Location: En try Exit Type: System Field Use: Sub-query filter/Results Object
	Service Provide Start Date	Location: Services (Outer) Type: System Field Use: Results Object
	Service Provide End Date	Location: Services (Outer) Type: System Field Use: Sub-query filter/Results Object
	Service HPRP Finance Start Date	Location: Services (Outer) Type: System Field Use: Results Object
	Service HPRP Finance End Date	Location: Services (Outer) Type: System Field Use: Results Object
	Client First Name	Location: Client/ Client Unique Id Type: Field Detail Use: Results object
	Client Last Name	Location: Client/ Client Unique Id Type: Field Detail Use: Results object
	Service Provide Provider	Location: Services (Outer) Type: System Field Use: Results Object
	Entry Exit Type	Location: En try Exit Type: System Field Use: Sub-query filter
	Entry Exit Inactive	Location: En try Exit Type: System Field Use: Sub-query filter
	Client Inactive	Location: Client Type: System Field Use: Sub-query filter
	Housing Status	Location: En try Exit/Entry Objects Type: System Field Use: Sub-query filter
	Service Inactive	Location: Services (Outer) Type: System Field Use: Sub-query filter

## #521 Revision History

Version	Description of Changes
V2	Fixed an issue where the variable \$END would be a day off from the actual end date.