Service Contacts Reports

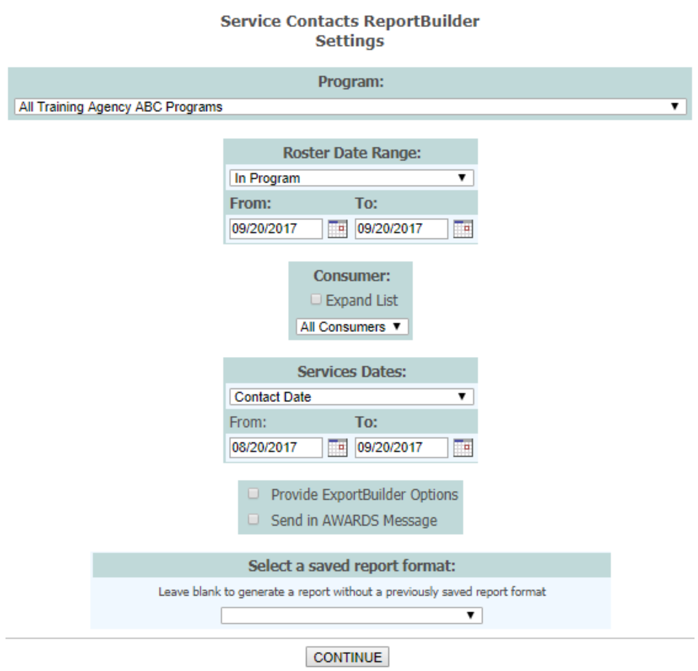
Using Service Contacts ReportBuilder as a Supervisory Tool

AWARDS can be used for more than just basic data entry. Using multiple types of reporting supervisors have the ability to follow up on and review the data that is being entered by staff. This document is intended to give supervisors step by step guidance on how to run a “Pre-Built” Contacts Log Report, as well as instructions on how to build and save a report that can be tailored to the needs of each program.

Staff Contacts Log Summary Report

The purpose of this report is for supervisors to monitor that client contacts are being entered and in a timely manner. It also allows supervisors to open the contacts in report mode to review them.

1. From the AWARDS Home Page select “Charts” from the Left Menu
2. Select Services
3. Select either the specific program to report on, or select “All Agency Programs” from the Program Selection Drop Down menu
4. Select Service Contacts ReportBuilder. The Service Contacts ReportBuilder Settings Page is displayed



5. In the Roster Date Range section select whether to run this report by clients who were In Program regardless of admission or discharge dates during the report time frame, who were Admitted only during the report time fame, or who were Discharged only during the report time frame
6. In the From and To date fields use either enter the dates or use the available date picker to assign the time frame that the clients to be included in the report were either in program, admitted, or

discharged. * Reminder: The system only allows reports to be run for a 2-year maximum. If you need to look back further than 2 years from the current date you will need to run more than 1 report

7. In the Services Date Section select to run the report by Date Written
8. In the From and To date fields either enter the dates or use the available date picker to select the time frame of the contacts that are to be viewed.
9. Select CRHMIS – Staff Contacts Log Summary from the Select a Saved Report Format Drop Down Menu
10. Click Continue
11. The Report is Displayed

CARES

Training - CoC Permanent Housing
CRHMIS - Staff Contacts Log Summary
All Consumers
Roster: 09/21/2015 to 09/20/2017
Services Date Written: 09/21/2015 to 09/20/2017

Excel File

Note Writer	Date Written	Contact Date	Time Written	Name (First Last)	
Kelli Clark	09/19/2017	09/14/2017	4:05 pm	Ben Anas	
Staff Trainer	08/02/2017	08/02/2017	10:52 am	Ava Cado	
Staff Trainer	09/19/2017	09/09/2017	4:01 pm	Ben Anas	
Staff Trainer	09/19/2017	09/01/2017	4:09 pm	Ella Phant	
Staff Trainer	09/19/2017	08/22/2017	4:07 pm	Ava Cado	
Staff Trainer	09/19/2017	08/14/2017	4:07 pm	Ava Cado	
Staff Trainer	09/19/2017	08/05/2017	4:06 pm	Ava Cado	
Staff Trainer	09/19/2017	09/09/2017	4:03 pm	Ben Anas	Vi
Staff Trainer	09/19/2017	09/09/2017	3:58 pm	Ben Anas	
Staff Trainer	08/02/2017	08/02/2017	10:52 am	Ava Cado	
Staff Trainer	09/19/2017	09/09/2017	3:58 pm	Ben Anas	
Staff Trainer	09/19/2017	09/09/2017	3:56 pm	Ben Anas	
Staff Trainer	09/19/2017	09/09/2017	3:56 pm	Ben Anas	
Staff Trainer	09/19/2017	09/08/2017	3:51 pm	Ben Anas	
Staff Trainer	09/19/2017	09/08/2017	3:51 pm	Ben Anas	
Staff Trainer	09/19/2017	09/08/2017	3:51 pm	Ben Anas	
Staff Trainer	08/02/2017	08/02/2017	10:52 am	Ava Cado	
Staff Trainer	09/19/2017	09/05/2017	4:15 pm	Ella Phant	

The report displays the Staff that entered the information "Note Writer", the date the note was entered into AWARDS "Date Written", the date the contact with the client occurred "Contact Date", the time the note was entered into AWARDS "Time Written" and the Client's name. To the right of each row is a magnifying glass icon. Clicking this allows the supervisor to open the note in a separate tab in report mode to view the contents.

Training - CoC Permanent Housing Supportive Services Checklist Report

Consumer	Date
Ben Anas	**09/09/2017**

Start Time	End Time	Duration	Face to Face	Primary Problem Area
09:45 AM	10:00 AM	Hours 0 Minutes 15	no	Case/Care Management

Supportive Services Checklist:

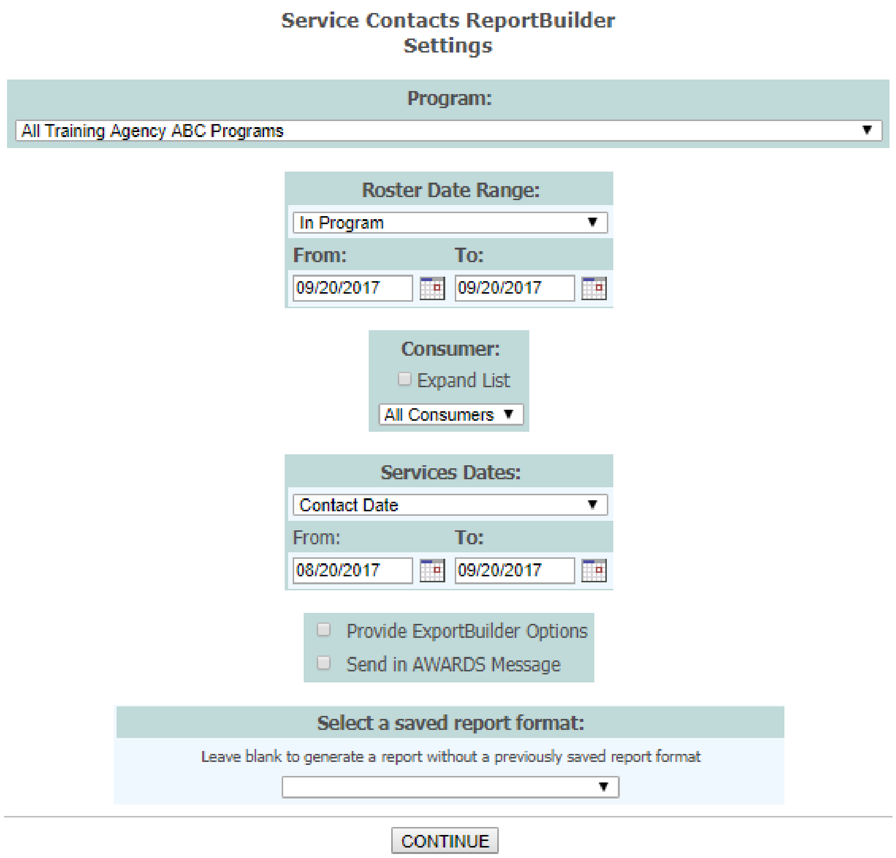
Service	Units	Cost	Service Details	Funding Source
• Housing Placement	1	0		unknown
• Phone Call	1	0		unknown

Progress Note:
Writer contacted client via phone. Client stated he could not attend scheduled office visit due to friend letting him know that he could not give him a ride until this afternoon. Office visit is rescheduled for 3:30 today 9/9/17

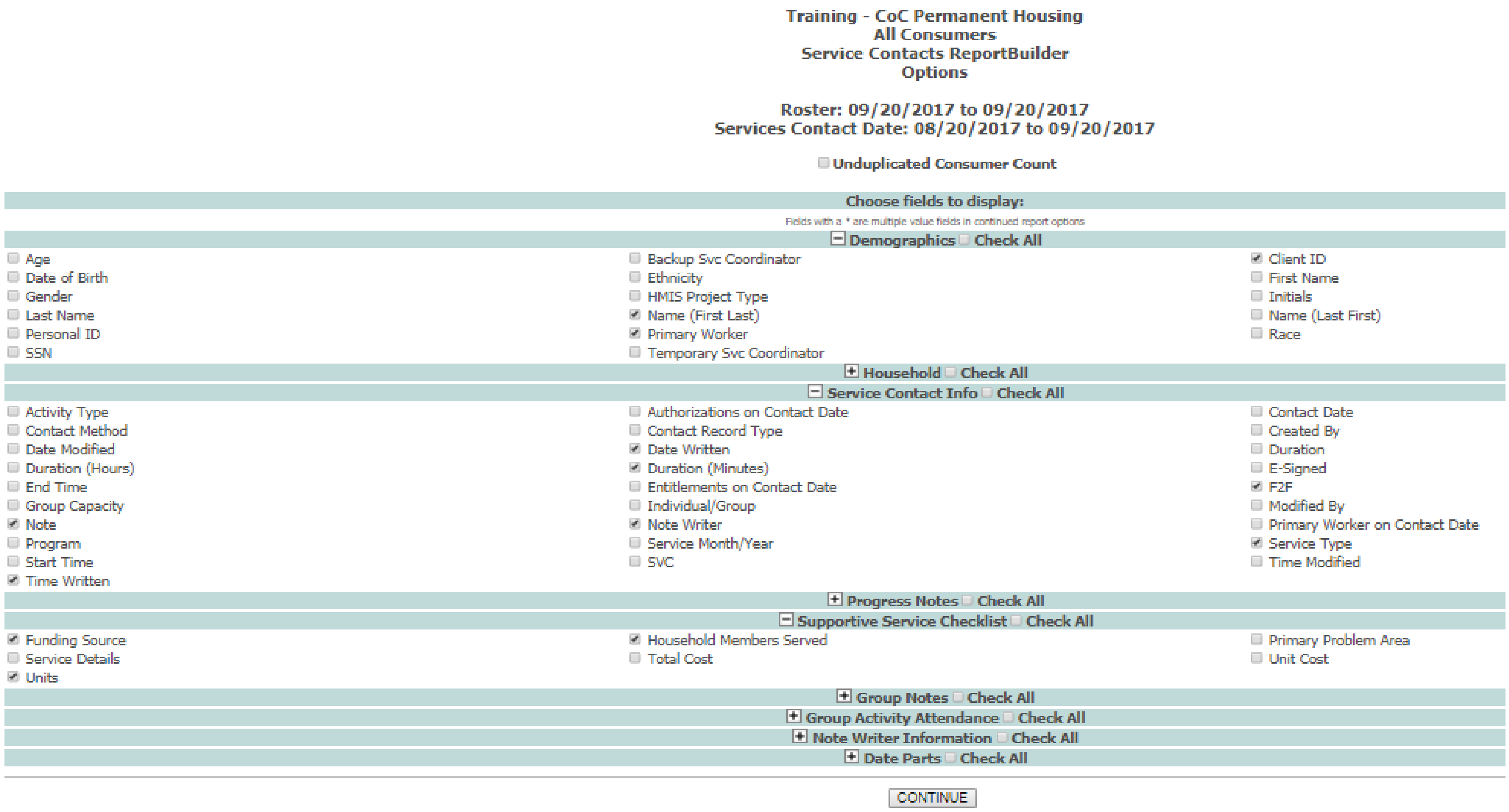
Service Contacts ReportBuilder

AWARDS Users can build and run reports in different reportbuilder modules to meet the needs of the program.

1. From the AWARDS Home Page select “Charts” from the Left Menu
2. Select Services
3. Select either the specific program to report on, or select “All Agency Programs” from the Program Selection Drop Down menu
4. Select Service Contacts ReportBuilder. The Service Contacts ReportBuilder Settings Page is displayed



5. In the Roster Date Range section select whether to run this report by clients who were In Program regardless of admission or discharge dates during the report time frame, who were Admitted only during the report time fame, or who were Discharged only during the report time frame
6. In the From and To date fields use either enter the dates or use the available date picker to assign the time frame that the clients to be included in the report were either in program, admitted, or discharged. * Reminder: The system only allows reports to be run for a 2-year maximum. If you need to look back further than 2 years from the current date you will need to run more than 1 report
7. In the Services Date Section select to run the report by Date Written
8. In the From and To date fields either enter the dates or use the available date picker to select the time frame of the contacts that are to be viewed.
9. Click Continue. The Service Contacts ReportBuilders Options Page is displayed



Training - CoC Permanent Housing
All Consumers
Service Contacts ReportBuilder
Options

Roster: 09/20/2017 to 09/20/2017
Services Contact Date: 08/20/2017 to 09/20/2017

☐ Unduplicated Consumer Count

Choose fields to display:
Fields with a * are multiple value fields in continued report options

⊟ Demographics ☐ Check All

☐ Age
☐ Date of Birth
☐ Gender
☐ Last Name
☐ Personal ID
☐ SSN
☐ Backup Svc Coordinator
☐ Ethnicity
☐ HMIS Project Type
☑ Name (First Last)
☑ Primary Worker
☐ Temporary Svc Coordinator
☑ Client ID
☐ First Name
☐ Initials
☐ Name (Last First)
☐ Race

⊞ Household ☐ Check All

⊟ Service Contact Info ☐ Check All

☐ Activity Type
☐ Contact Method
☐ Date Modified
☐ Duration (Hours)
☐ End Time
☐ Group Capacity
☑ Note
☐ Program
☐ Start Time
☑ Time Written
☐ Authorizations on Contact Date
☐ Contact Record Type
☑ Date Written
☑ Duration (Minutes)
☐ Entitlements on Contact Date
☐ Individual/Group
☑ Note Writer
☐ Service Month/Year
☐ SVC
☐ Contact Date
☐ Created By
☐ Duration
☐ E-Signed
☑ F2F
☐ Modified By
☐ Primary Worker on Contact Date
☑ Service Type
☐ Time Modified

⊞ Progress Notes ☐ Check All

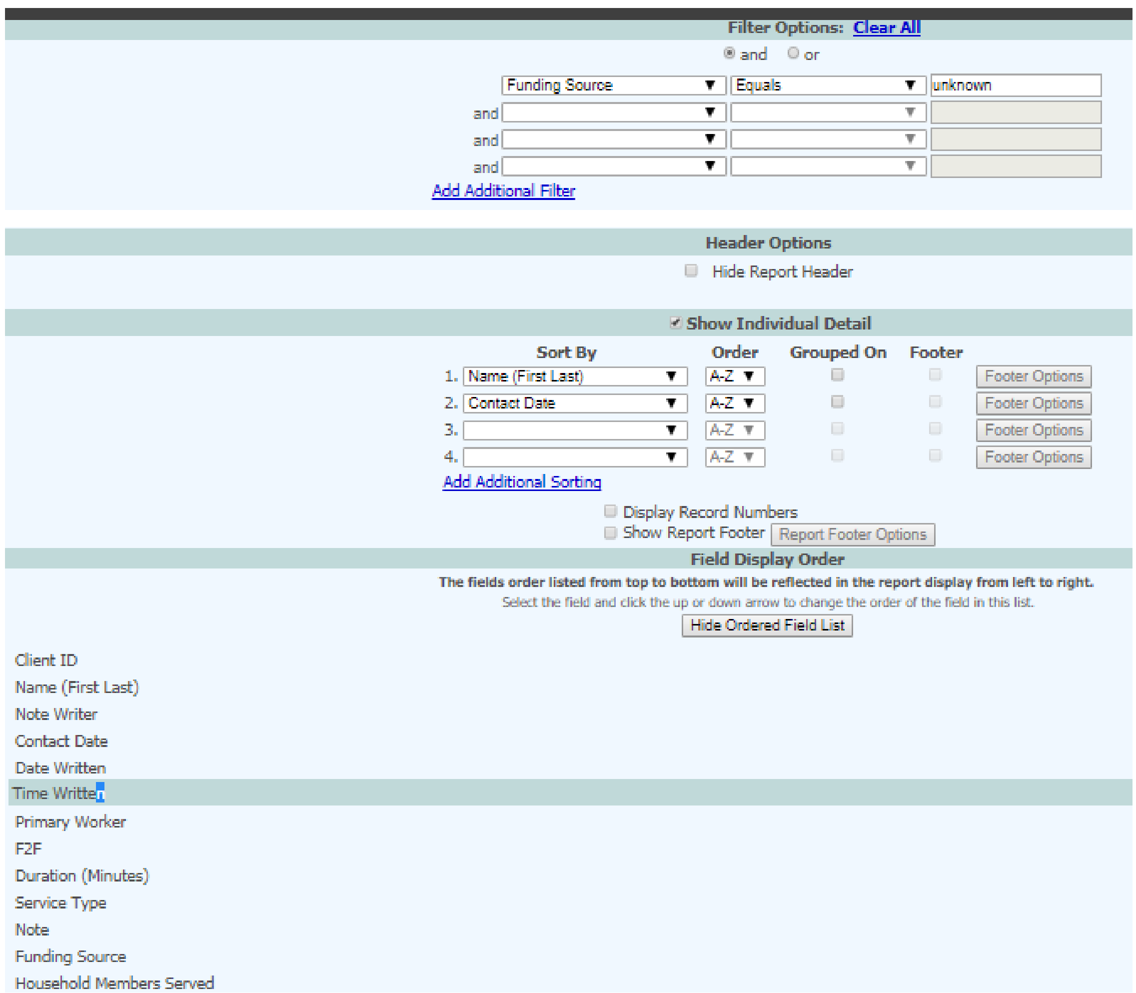
⊟ Supportive Service Checklist ☐ Check All

☑ Funding Source
☐ Service Details
☑ Units
☑ Household Members Served
☐ Total Cost
☐ Primary Problem Area
☐ Unit Cost

⊞ Group Notes ☐ Check All
⊞ Group Activity Attendance ☐ Check All
⊞ Note Writer Information ☐ Check All
⊞ Date Parts ☐ Check All

CONTINUE

10. Select the data elements to be included in the report
11. Click Continue. The Service Contacts ReportBuilder Options Continued Page is displayed



Filter Options: Clear All

◉ and ○ or

Funding Source | Equals | unknown
and
and
and

Add Additional Filter

Header Options

☐ Hide Report Header

☑ Show Individual Detail

Sort By	Order	Grouped On	Footer	
1. Name (First Last)	A-Z	☐	☐	Footer Options
2. Contact Date	A-Z	☐	☐	Footer Options
3.	A-Z	☐	☐	Footer Options
4.	A-Z	☐	☐	Footer Options

Add Additional Sorting

☐ Display Record Numbers
☐ Show Report Footer Report Footer Options

Field Display Order

The fields order listed from top to bottom will be reflected in the report display from left to right.
Select the field and click the up or down arrow to change the order of the field in this list.

Hide Ordered Field List

Client ID
Name (First Last)
Note Writer
Contact Date
Date Written
Time Written
Primary Worker
F2F
Duration (Minutes)
Service Type
Note
Funding Source
Household Members Served

12. Configure the filter options as needed. In this case I am looking for Contact Logs that only contain a funding source of Unknown
13. Select to display the report with Individual Detail
14. Select how the report should be sorted. In this case I want the report to display by Client (in alphabetical order) followed by the dates of each contact
15. Configure the Field Order Display for how the report columns should display by clicking and holding the mouse on the data element to be "moved" and dragging it to where you want it. If this is not done the report will default to displaying the first 2 columns based on the "sort" selections and the remainder of the columns will display alphabetically. In this case I chose to move the elements around so that the Client ID will display first followed by the client name, then the name of the staff that entered the information and so on. This may take some playing around with until the report displays in a way that makes sense to you.
16. If this is a report you will plan on running with any sort of frequency you can save this report.
    a. Click Save Report Format
    b. Name the report
    c. Select who to save the report for
    d. Select which programs to display the report for
    e. Click Save Report Format. The page will refresh and this pop up will disappear
17. Click Display Report. The report is displayed

Save Report Format

This feature allows you to save your settings selected for this report without requiring you to enter all the settings repeatedly when you want to run the same report in the future

You will only be able to modify or delete a report format that you created yourself unless you are in the System Administrator or Executive Officer user groups.

Report Format Title: Report Name

Default Report: Yes No

Save Report Format for: Yourself All Staff

Allow Report Format for: This Program All Programs

Save Report Format | Cancel

CARES

Training - CoC Permanent Housing
Service Contacts ReportBuilder
All Consumers
Roster: 09/20/2017 to 09/20/2017
Services Contact Date: 08/20/2017 to 09/20/2017

Filter Applied:
Funding Source Equals unknown
Excel File

Client ID	Name (First Last)	Note Writer	Contact Date	Date Written	Time Written	Primary Worker	F2F	Duration (Minutes)	Service Type	Note	Funding Source	Household Members Served	
242158041	Ava Cado	Staff Trainer	08/22/2017	09/19/2017	4:07 pm		No	10	Case/Care Management	writer left VM for client to schedule an office visit	unknown	1	
242493041	Ben Anas	Staff Trainer	09/08/2017	09/19/2017	3:51 pm		Yes	90	Case/Care Management	Met with client for initial intake. Client provided this writer with all necessary documentation re: Homelessness and disability status. Client stated he is happy to be working with this agency. Writer provided client an apartment listing. Appointment is scheduled for tomorrow 9/9/17 to call potenti...	unknown	1	
242493041	Ben Anas	Staff Trainer	09/08/2017	09/19/2017	3:51 pm		Yes	90	Housing Placement	Met with client for initial intake. Client provided this writer with all necessary documentation re: Homelessness and disability status. Client stated he is happy to be working with this agency. Writer provided client an apartment listing. Appointment is scheduled for tomorrow 9/9/17 to call potenti...	unknown	1	
242493041	Ben Anas	Staff Trainer	09/08/2017	09/19/2017	3:51 pm		Yes	90	Symptom Management	Met with client for initial intake. Client provided this writer with all necessary documentation re: Homelessness and disability status. Client stated he is happy to be working with this agency. Writer provided client an apartment listing. Appointment is scheduled for tomorrow 9/9/17 to call potenti...	unknown	1	
242493041	Ben Anas	Staff Trainer	09/09/2017	09/19/2017	4:03 pm		Yes	150	Housing Placement	Client and writer visited 2 apartments for possible rental. Client felt the first apartment was a little to small, and did not like the gas stove. Client was really happy about the second apartment. Liked the size and that it was located on the first floor. Client signed lease with the land lord	unknown	1	
242493041	Ben Anas	Staff Trainer	09/09/2017	09/19/2017	4:01 pm		Yes	70	Housing Placement	Office Visit with client to call land lords on apartment listing. Client selected 4 apartments and called the land lords to schedule appointments to view the apartments. 2 of the 4 had availability to show apartments right away. Client and writer will view apartments later this afternoon	unknown	1	
242493041	Ben Anas	Staff Trainer	09/09/2017	09/19/2017	3:58 pm		No	15	Phone Call	Writer contacted client via phone. Client stated he could not attend scheduled office visit due to friend letting him know that he could not give him a ride until this afternoon. Office visit is rescheduled for 3:30 today 9/9/17	unknown	1	
242493041	Ben Anas	Staff Trainer	09/09/2017	09/19/2017	3:58 pm		No	15	Housing Placement	Writer contacted client via phone. Client stated he could not attend scheduled office visit due to friend letting him know that he could not give him a ride until this afternoon. Office visit is rescheduled for 3:30 today 9/9/17	unknown	1	
242493041	Ben Anas	Staff Trainer	09/09/2017	09/19/2017	3:56 pm		No	5	Phone Call	Writer received VM from client stating he could not attend 11:00 Office Visit due to lack of transportation at that time. Asks to reschedule for the afternoon. Writer will return call	unknown	1	
242493041	Ben Anas	Staff Trainer	09/09/2017	09/19/2017	3:56 pm		No	5	Housing Placement	Writer received VM from client stating he could not attend 11:00 Office Visit due to lack of transportation at that time. Asks to reschedule for the afternoon. Writer will return call	unknown	1	
242493041	Ben Anas	Kelli Clark	09/14/2017	09/19/2017	4:05 pm		Yes	15	Case/Care Management	Client called to let us know that he is all moved into his new apartment and to let writer know that he will be in tomorrow 9/15/17 for his scheduled office visit	unknown	1	
242496041	Ella Phant	Staff Trainer	09/01/2017	09/19/2017	4:09 pm		No	15	Case/Care Management	Phone call with client to schedule upcoming home visit. Client agreed to meet writer at their apartment on 9/6/17 at 2:00pm	unknown	1	
242496041	Ella Phant	Staff Trainer	09/05/2017	09/19/2017	4:15 pm		Yes	30	Case/Care Management	Home Visit completed I am done writing notes	unknown	1	

Record Count: 13

Now that this report has been saved you will be able to select it from the Select a Saved Report Format Drop Down Menu as described in the CRHMIS – Staff Contacts Log Summary section above