Marin County HMIS Report Library Glossary

CA-507 Marin County CoC

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Introduction

The goal of this Report Glossary is to help you reference the most helpful* HMIS reports in the Report Library (also referred to as canned reports or Pentaho Reports) accessible to all HMIS Users, as well as to provide valuable use cases for when certain reports may be especially useful for your various reporting requirements. To access reports, click the Launchpad → Reports → Report Library tab. For more information, please visit the Bitfocus Help Center.

Please note that this resource* ***does not include all possible reports found in the Report Library**, but rather aims to provide you with what we believe the most powerful reporting tools are within the Report Library. Additionally, it will not include any custom reports that may have been created by your agency. If there are additional reports you use and think that they would be valuable to include in this resource, please email us at marin-admin@bitfocus.com.*

Highlighted Reports

- ⇒ Program Roster
- ⇒ Annual Performance Review (APR)
- ⇒ HMIS Data Quality
- ⇒ Staff Active Caseload
- ⇒ Case Notes
- ⇒ Annual Assessment Overview

Data Quality Reports

Report Name	Report Description	Examples of When to Use this Report
[DQXX-102] Program Data Review	This report pulls enrollment data by client from both the enrollment and exit screens. Agency Managers can go down the roster and look for data quality issues for each client's enrollment. When the report is run with Report Output Format = Web Page, it is possible to drill down on issues in the "Missing Entry Data" and "Missing Exit Data" columns. Issues will show up when a field response is "Client doesn't know," "Client prefers not to answer," "Data not collected" or is NULL.	This report can help you answer the following questions about individual clients enrolled in a program: • Which active or exited clients have data issues with their enrollments in the program? • How many clients have data issues in the program? • What are the data issues for each client?
[DQXX-121] Project Start Date > Project Exit Date	This report identifies project enrollments where the Project Exit Date is before the Project Start Date. These situations can occur during data integration and in some situations where the project start or exit date are updated after the fact.	This report can help answer the following questions: • Are there data quality issues where Project Exit Dates are before Project Start Dates?

COUNTY OF MARIN

[DQXX-110] Duplicate Clients	The Duplicate Clients report identifies client records that have matching Personal IDs. It is recommended that this report be run regularly to improve data quality. The following fields are included in the report to determine if there is an exact match: ● Name and Name Data Quality ● SSN and SSN Data Quality ● Date of Birth and DOB Data Quality ● Gender ● Race and Ethnicity ● Veteran Status If there is an exact match, the duplicate client records will need to be merged. Please reach out to the Bitfocus Help Desk at marin@bitfocus.com to request client merges for duplicate clients.	This report can help you answer the following questions: ● Are two similar client records duplicates? ● How many clients are potentially duplicates for the agencies and/or programs I work with? ● Are staff searching for existing client records before creating new ones?
[DQXX-103] Monthly Staff Report	The Monthly Staff Report is designed to be scheduled and sent to Agency Managers to review how active staff are doing in terms of data entry, with a focus on timeliness and data issues for HUD-funded CoC projects. The report can assist with more targeted efforts to improve training and data quality. The report also includes inactive users with actively enrolled clients. Users can run the report with Report Output Format = Web Page to drill down to lists of clients included in the report metrics.	This report can help answer the following question: ● Which staff members are having issues with timeliness in data entry? ● Which inactive staff members are still assigned clients? ● Which HUD-required data elements have a high percent of Client Prefers Not to Answer, Client Doesn't Know, or Data Not Collected responses? ● Which staff members are entering the highest percent of Client Prefers Not to Answer, Client Doesn't Know, or Data Not Collected responses?

Service Based Reports

Note: Service Based reports are ONLY helpful to use for services that are not associated with Programs. For that reason, we encourage you to refer to the program-based service reports which will be found in the Program Based reports section of this resource.

Report Name	Report Description	Examples of When to Use this Report
[GNRL-104] Service Summary [Service Based]	This service-based report provides a high-level summary for selected services over the reporting period. It includes the number of unique clients, number of services, and number of service days for each service. Services are reported by Service Name, with counts for each Service Item. When the report is run with Report Output Format = Web Page, it is possible to drill down to lists of clients and service dates within each cell of the report.	This report can help you answer the following questions: ● What services were used by clients during a reporting period? ● How many services were provided over the reporting period? ● How many unique clients were served during the reporting period for each service, regardless of how many times the services were provided? ● What was the total number of service days provided for each service?

[GNRL-102] Client List	This is a service-based report that lists details of all clients who have received selected service item(s) for a specified period of time. Important report parameters to note: ● The "Veteran Status" parameter in this report allows you to run this report based on the response option in the "Veteran Status" field on the client profile (No/Yes/Client doesn't know/Client prefers not to answer/Data not collected). If "All" is selected for this parameter, the report results are not filtered based off of a client's specific veteran status. ● The "Matching Criteria" parameter in this report determines how clients with the selected service(s) will be generated. If you run the report with multiple services, selecting **In All the selected services** displays only clients receiving all of the selected services, whereas selecting **In Any of the selected services** displays all the clients receiving *at least one* of the selected services. This report contains: ● Responsible Staff ● Client Name, Unique ID ● Data Quality Percentage (Based on Quality of Name, SSN, Quality of SSN, DOB, Quality of DOB, Gender, Race & Ethnicity, Veteran Status (for those 18 or older)	This report can help you answer the following questions for a specific time period: ● What services has a client had? ● What services have veterans received? ● What staff members have provided or recorded the service? ● Which clients received a particular service?
[GNRL-103] Service Census [Service Based]	This is a service-based report that displays all the services and times that those services were provided throughout a predetermined reporting period. Each drill down generates a list of clients who received those services. The report contains: ● The report is divided by month ● A list of services that were provided during the date range ● Count of total number of services provided Vs. Number of unduplicated Clients Served The drill down contains: ● Unique ID, Client Name, Data quality, Responsible Staff	This report can be used to: ● Identify the total number of services that were provided during a specific time. ● Identify clients who received recurrent services without fixing their homelessness status. ● Know which services has more demand, which are the services that are not necessary.

[EXPS-101] Funding Source Financial Detail	This service-based report provides detailed information for programs tracking expenses for clients using services. It can be run for current or past funding sources. The report includes the following fields for each Service/Service Item: • Notes • Vendor • Check Number • Check Date (Expense Date) • Month Paid (Expense Date) • Amount • Address (Client Location) There is also a “Current Funding Totals” table to help see the funding source amount and the total amount available.	This report can help you answer the following questions: • What service expenses have been entered? • Which clients received the services/ had a payment? • How many checks have been issued for a particular service? • What vendors have been paid? • When did service expenses occur? • Where were the clients located who received payment?

Program Based Reports

Report Name	Report Description	Examples of When to Use this Report
[EXPS-103] Program Funding Source Financial Detail	This enrollment-based report provides a full list of expense service records. The report will include spending records for program-related services that have a date during the reporting period and matched the parameter requirements. The report will be organized by program, service and service item.	This report can help you answer the following questions: • What service expenses have been entered? • Which clients received the services/ had a payment? • How many checks have been issued for a particular service? • What vendors have been paid? • When did service expenses occur? • Where were the clients located who received payment?
[GNRL-406] Service Census [Program Based]	This report shows the number of clients who received selected services per day within the report's date range, organized by program. It has a table for each program to differentiate where the client received the service. • Daily report of how many clients were in beds (ie, utilization of beds) • Total clients or households served in reporting period • Total bed nights provided in reporting period • Max occupancy for beds in program • Drilldown functionality to provide client lists	This report can be used to: • Identify the total number of services that were provided during a specific time. • Identify clients who received recurrent services without fixing their homelessness status. • Know which services has more demand, which are the services that are not necessary.

[GNRL-407] Service Summary [Program Based]	This program-based report the number of unique clients, the number of services, and the number of service days per selected service within the report date range, organized by program. The report is sorted by program. It provides a total number of unique clients, number of services provided and number of service days.	This report can help you answer the following questions: ● What services were used by clients during a reporting period? ● How many services were provided over the reporting period in a program? ● How many unique clients were served during the reporting period for each service, regardless of how many times the services were provided in the program? ● What was the total number of service days provided for each service?
[GNRL-408] Service Issuance Summary [Program Based]	This report summarizes the issued services within the report date range by program. This report includes a table for each program that differentiates which program the client received the service. The report is divided into two sections: ● Summary: ○ # of Clients - This indicates how many clients received the service ○ # of Issuances - This indicates how many times a service was issued ● Totals: ○ Total Clients - unduplicated count of clients who received at least 1 issuance of the service ○ Total Issuances - This is the total amount of times the service was issued during the report dates	This report can help you answer the following questions for a specific time period: ● What services has a client had? ● What services have veterans received? ● What staff members have provided or recorded the service? ● Which clients received a particular service?
[GNRL-409] Annual Assessment Overview [Program Based]* **Brand New Report as of 5/19/25*	This program-based report gives you a clear overview of a client's Annual Assessment Status. It helps you quickly spot completed, upcoming, and overdue annual assessments so you can stay on top of your programs data, keep your data accurate and in compliance. The report is divided into two sections: ● Annual Assessment Overview Table displays the count of Annual Assessments ○ Total number of assessments and their status ○ Each status has drilldown functionality that will display a list of clients ● Client Detail Table displays a summary of the client's ○ Program enrollment ○ Number of expected and completed annual assessments ○ Status of last completed assessment and the due date for their next assessment	This report can help you answer the following questions: ● Have clients completed their Annual Assessments on time? ● What has been completed, is overdue, or missing in the annual assessment? ● When is the next annual assessment due?

[OUTS-205] Program Recidivism	This report gives a summary, by program type, of destinations and length of time before returning to homelessness over the reporting period. The report is organized by Program Type and displays the following categories: • Number of clients who exited • Number of clients who exited to permanent destinations • Number of clients returning to homelessness • Average number of days from program exit to re-entry	This report can help answer the following questions: • Who exited SO, ES, TH, SH or PH to a permanent housing destination? • Who returned to homelessness after exiting to a permanent destination? • What is the average time of homeless recidivism?
[OUTS-200] Program Outcomes	This report details the client's cash and non-cash income at exit from mainstream programs. It also provides housing outcomes for the Transitional and Permanent Housing programs. The report is divided into two tables: • Table A: Displays cash and non-cash benefits reported by clients at program exit. • Table B: Only reports information for Transitional Housing & Permanent Housing programs.	This report can be helpful to: • Analyze cash and non-cash benefits • Analyze stayers and leavers • Know the number of Adults and HoH exited during a date range
[GNRL-241] New vs. Re-Entry Client Program Classification	This report gives an overview of program starts within the reporting period. It determines whether the client or family has already enrolled in the program. The report is organized by program and shows the number of new clients and re-entry clients.	This report can help answer the following questions: • How many clients were enrolled in the projects within a given timeframe? • How many clients have been enrolled in the project prior to the current enrollment? • How many clients are brand new to program?
[GNRL-106] Program Roster	This report is an incredibly powerful tool that provides a user-friendly list of clients and households enrolled in and exited from programs during a specific date range. This report contains: • Client Name, Unique Identifier, DOB, Age at Entry, Current Age • Enroll Date, Exit Date • LOS, Housing Move-in Date • Number of A (Assessments), S (Services), CN (Case Notes) recorded • Assigned Staff, Unit Assignment, Bed Assignment. • Occupancy Start Date, Occupancy End Date • Number of Enrollments, Number of Unique Clients and Number of Households per project	This report can help answer the following questions: • Are all clients currently being served enrolled in the program? (Do they show up on the report?) • How many clients were served in the last year? • How long have clients been enrolled? • Are there households who have left the program but still show up on the roster and need to be exited? • Are household members grouped together correctly? (Clients are grouped by household.) • Which HH is missing Move-In Date? • Who is the assigned staff to a specific client? • Has a client been enrolled more than once in a project?

[OUTS-101] Program Outcome Measures	This program enrollment-based report reviews basic exit destination and income outcomes of enrollment in the selected programs. This report contains: ● Number of clients and percentages for 6 outcomes based on Destination and Income measures. ● The 6 outcomes are: ○ Obtain permanent housing ○ Decrease exits to streets/shelters ○ Exit with earned income ○ Obtain stable income at discharge (for those who had 0 income at intake) ○ Exits to known destinations ○ Of those who exited to PH, Length of Time to obtain housing	This report can help you answer the following questions: ● What were outcomes related to housing and income for clients or head of households in the program?
[GNRL-220] Program Details Report	This report pulls all program enrollment data from screens in Clarity into an Excel file format. This report helps Agency Managers to check and analyze data entered for specific programs. The report can be run for all screens – or any chosen screens, including: ● Entry Data ● Status Assessment Data ● Annual Assessment Data ● Current Living Situation ● Exit Data ● Follow-Up Assessment Data	This report can help answer the following questions: ● What fields contain a large number of Client Doesn't Know, Client Prefers not to Answer, or Data Not Collected? ● What fields do we need to focus on to improve our overall data quality? ● Where can training be improved for better data entry? ● Where can workflows be improved for better data entry?
[OUTS-106] Client Demographics [Program Based]	This report displays client demographic information using graphics (column and pie charts) to visualize the data. ● You can include one or more projects and/or project types, ● You can also run the report just for the veterans This report contains: Age, Gender, Race & Ethnicity, disabled (Adults & HoH), Physical Disability, Developmental Disability, Chronic Health Condition, HIV/AIDS, Mental Health Disorder, Substance Use Disorder, Chronic Homelessness (Adults & HoH at Project Start), Veteran Status (Adults Only), Prior Living Situation (Adults & HoH), Prior Living Duration (Adults & HoH), Individual Income (Adults & HoH), Household Income, SSN Validity.	This report can be helpful to: ● Analyze demographic data for a specific project, project type. ● This is a quick way to analyze data for vets and their demographic info. ● Analyze equity and distribution by demographic groups for clients served by programs.

[GNRL-105] Program Participation Summary	This report contains basic program information for both active and inactive clients who participated in the selected program(s) within the specified report times. The report focusses on the head of household with the option to include or exclude family members in the report prompts. The report is divided in two sections, Active and Inactive clients. This report contains the following data: ● Unique ID, DOB, Household Members, Start Date, End Date, LOS, Assessments, Services, Assigned Staff, Group Members (if show group member is selected in the prompts)	Use this report when: ● A count of HoHs is required. ● Analyzing the LOS for HoHs. This report can help answer the following questions: ● What is the LOS in specific projects? ● What is the typical size of a family?
[EXIT-101] Potential Exits	This program-based report lists clients who are active in a program but have not received services, case notes, unit connections, or CE events or program-connected assessments since a selected cutoff date. The report includes the following information: ● Client's Unique ID, Name, SSN, Project Name ● Most recent activity(ie, service, case note, current living situation, etc.) ● Date of most recent activity ● Assigned staff ● Household type	This report can help answer the following questions: ● Are there clients active in a program who should be exited? ● When was a client enrollment last updated for a particular program? ● What type of activity was the most recent update to a client's enrollment?
[GNRL-240] Program Household Served	This program-based report provides a summary of households served, during the reporting period, and the size of the enrolled households. It can be run for one or multiple programs, and will be broken down by program. For each Household size (1 person HH to 7+ person Household), the number of households and total number of persons is reported. When the report is run with Report Output Format = Web Page, it is possible to drill down on either the number of households or number of persons in households to lists of clients.	This report can help you answer the following questions: ● What household size is most often served by a program? ● How many single-person households are served vs family households? ● Are large families served by a program? ● What is the most common household size for the clients in the program?

Assessment Based Reports

Report Name	Report Description	Examples of When to Use this Report
[GNRL-210] Assessment Details Report	The Assessment Details report pulls all client responses to questions on selected assessments into an Excel file. Clients must have an assessment during the reporting period to be included in the report, but do not have to have an enrollment. In addition to the assessment fields, this report includes basic information for each client, including the assessing agency and/or program and demographic information (Age, Gender, Race and Ethnicity).	This report can help you answer the following questions: ● What were the responses for questions on assessments? ● What fields contain many Client Doesn't Know, Client Prefers not to Answer, or Data Not Collected? ● What fields do we need to focus on to improve our overall data quality?
[GNRL-404] CE Assessment Details Report	The CE Assessment Details report will only pull in clients that had a Coordinated Entry Assessment (MAV-SA and Family Self-Sufficiency Matrix Assessments) completed during the reporting period selected. Users must have access to the Marin County Coordinated Entry Agency and be switched into that agency when running the report in order for results to return. This report can be run based on "Assessing Users" (selection of specific or all users), or not based on "Assessing Users." The report includes the following information: ● Client Name (Last, First) and Unique ID ● Assessment Date ● Client Demographics – age, gender, veteran status ● Household type and count of adults and children ● Referred to Queue ● If the client has Contact Info and Location Info (Y/N) ● Assessing Program Name, Assessing Staff Name, Staff Home Agency	**This report is only applicable to the MAV-SA and Family Self-Sufficiency Matrix Assessments**. This report can help you answer the following questions: ● Which clients had a MAV-SA and Family Self-Sufficiency Matrix Assessments completed within a specific date range? ○ What is the demographic break-down and/or household type of these clients? ● Which users are assessing clients (i.e., completing MAV-SA and Family Self-Sufficiency Matrix Assessments)? ● Are clients that our agency has assessed currently referred to a Queue? ● Do clients that our agency has assessed have Contact and/or Location info logged in the Contact and Location tabs on the client's profile?
[GNRL-405] CE Assessing Staff Report	This report provides all the same detail as the CE Assessment Details report (see above row for more details on that report). The difference is that the CE Assessing Staff Report is separated by the assessing staff person.	**This report is only applicable to the MAV-SA and Family Self-Sufficiency Matrix Assessments**. This report is intended for use by assessing staff and program managers who are overseeing accessing staff.

[OUTS-108] CE Demographics Report	This report shows the demographics of people served by the Coordinated Entry system, and reports on clients that had a MAV-SA and Family Self-Sufficiency Matrix Assessments completed during the reporting period selected. Users must have access to the Marin County Coordinated Entry Agency and be switched into that agency when running the report in order for results to return. This report displays client demographic information using graphics (column and pie charts) to visualize the data. ● Selected assessment must be "MAV-SA and Family Self-Sufficiency Matrix Assessments" ● You can also run the report just for the veterans This report contains: Age, Gender, Race & Ethnicity, disabled (Adults & HoH), Physical Disability, Developmental Disability, Chronic Health Condition, HIV/AIDS, Mental Health Disorder, Substance Use Disorder, Chronic Homelessness (Adults & HoH at Project Start), Veteran Status (Adults Only), Prior Living Situation (Adults & HoH), Prior Living Duration (Adults & HoH), Individual Income (Adults & HoH), Household Income, SSN Validity, Sexual Orientation.	**This report is only applicable to the MAV-SA and Family Self-Sufficiency Matrix Assessments.** This report can be helpful to: ● Analyze demographic data for clients who have a MAV-SA and Family Self-Sufficiency Matrix Assessments. ● This is a quick way to analyze data for vets with a MAV-SA and Family Self-Sufficiency Matrix Assessments and their demographic info.

Profile Screen Reports

Report Name	Report Description	Examples of When to Use this Report
[GNRL-212] Profile Details Report	This report lists all the responses or data elements collected on the client profile screen based on Services, Assessments and enrollments within a date range.	This report can help you answer the following questions: ● What were the responses for questions on the Client Project Profile Screen? ● What fields do we need to focus on to improve our demographic information data quality?

Housing Reports

Report Name	Report Description	Examples of When to Use this Report
[HSNG-108-AD] Housing Census	The report gives users a day-by-day account of the bed occupancy for particular agencies and programs during the user-selected reporting period. This is broken out into separate tables by programs selected. This report contains: ● Daily report of how many clients were in beds (ie, utilization of beds) ● Total clients or households served in reporting period ● Total bed nights provided in reporting period ● Max occupancy for beds in program ● Drilldown functionality to provide client lists	This report can help you answer the following questions for particular agencies and programs during a user-selected reporting period: ● What was the bed utilization? ● How many clients were served in beds? ● How many households were served in beds? ● How many total bed nights were provided? ● How many veteran individuals or households were served in beds?
[HSNG-104] Monthly Housing Report	This enrollment-based report provides a single-month review of housing programs. It is run for a one-month time period; it is possible to run it for any single month up to 6 months ago. The report gives a monthly average for how many clients were in each program's beds out of the total beds available. If there are no clients an "X" will appear; if there are no beds, a "0" will appear. When the report is run with Report Output Format = Web Page, it is possible to drill down to lists of clients in the "Unq" column. The report also has a "DQ%" column which can also be drilled on to view data quality issues.	This report can help you answer the following questions for a selected month: ● What were programs' average bed utilizations? ● How many unique clients occupied a program's beds? ● Are there data quality issues related to be utilization? ● Are programs correctly recording bed nights by project type? (ie, using this report to check that there are clients in beds) ● Are there programs without active bed inventory?

HUD Reports

Report Name	Report Description	Examples of When to Use this Report
[HUDX-225] HMIS Data Quality Report [FY 2024]	This report helps you assess and summarize the quality of data entered in Clarity. The report has 7 tables: ● Q1. Report Validation Table (total number of participants) ● Q2. Personally Identifiable Information (PII) ● Q3. Universal Data Elements ● Q4. Income and Housing Data Quality ● Q5. Chronic Homelessness ● Q6. Timeliness ● Q7. Inactive Records: Street Outreach and Emergency Shelter	This report can be useful to: ● Identify areas that need improvement. ● Identify missing data or data quality issues related to exit destinations, chronic homelessness, income and sources, non-cash benefits, and annual assessments. ● Track project progress and review timeliness of data entry. ● Develop a starting point for data quality management (DQM). ● Set standards for improving information quality and more. ● Prep/review data prior to running an APR.

[HUDX-227] Annual Performance Report [FY 2024] And [HUDX-228] ESG CAPER [FY 2024]	The APR and CAPER are two reports used to collect and submit performance data to the U.S. Department of Housing and Urban Development (HUD) within 90 days at the end of a recipient's operating year. APR is required by projects with CoC funding and the CAPER for projects funded by ESG.	This report can be useful to: • Review performance for CoC and ESG funded projects (Income, Chronicity, disabilities, etc). • Check Data Quality. • See active and inactive participants within a date range.
[HUDX-111] HUD CSV / XML Program Data Export [FY 2024]	This report pulls data from Clarity based on the mandated HUD Specs. The exported data is formatted in CSV or XML.	Use this report when you need to export data from Clarity.
[HUDX-235] CE APR (Coordinated Entry Annual Performance Report)	The CE APR is required to be submitted to HUD by communities receiving HUD Continuum of Care (CoC) funding for Supportive Services Only: Coordinated Entry (SSO: CE) projects. The CE APR is similar to the APR and CAPER Reports- but highlights Coordinated Entry specific data elements (i.e., 4.19 Coordinated Entry Assessment and 4.20 Coordinated Entry Event). The Web Page version of the report has drilldown functionality.	The CE APR is useful for evaluating data quality related to Coordinated Entry projects. In general, clients are included who have a Coordinated Entry Assessment and/or event during the reporting time period. The Bitfocus Help Center includes a helpful tool for an in-depth understanding of this report- and troubleshooting.
[HUDX-123] Housing Inventory (HIC) Supplemental	The Housing Inventory Count (HIC) Supplemental report is designed to be used as a tool to review housing inventory available for people experiencing homelessness. The report offers a point-in-time look at utilization while also being a visual tool to accompany LSA review for HIC reporting submissions. Logic in this report heavily relies on mimicking the LSA where relevant, while also including additional data points to aid in report review and analysis.	This report can help you answer the following questions: • What is my program's inventory in the HMIS? • What is my program's utilization rate for the Point-in-Time (PIT) Count date? (or another day, though the report is designed as a supplemental tool for HIC reporting) • What site address is in the HMIS for my program(s)? The "HIC Data Quality Review" section can additionally help you answer: • Do my program(s) have any overlapping enrollments on the PIT Count date? • Do my program(s) have any unknown household types or undefined Head of Households in the HMIS? • For housing programs – who is missing move-in dates on the PIT Count date?

Community and Referrals Reports

Report Name	Report Description	Examples of When to Use this Report
[RFRL-103] Referral Statistics – Inbound	This is a referral-based report is a helpful tool to provide aggregate counts of incoming referrals that were referred to the agency running the report, with the counts broken out by different referral statuses and by the referred-to program. Referrals included in this report were: ● Created within the reporting period or where any of the following referral statuses were recorded during the reporting period: Pending, Pending – In Process, Denied, Expired, Completed ● Created or changed status to Pending or Pending – In Process before the report start date and did not change status during the reporting period	Recommended to be used by users who are responsible for processing incoming referrals, or users who are responsible for overseeing staff who are processing referrals. This report can be useful to: ● Understand the number of referrals your agency received within a specified date range; understand the referral status of referrals your agency received. ● Gauge if you are following your community's referral policy of changing the referral status from "Pending" to "Pending – In Process" within 30 days of receiving the referral. ● High-level overview of the referrals that are being accepted/completed, expired, and denied.
[RFRL-122] CE Community Queue Detail Report	This is a referral-based report that requires a Coordinated Entry assessment (MAV-SA and Family Self-Sufficiency Matrix Assessments) within the Coordinated Entry program enrollment to be included in this report. This report is a tool that provides details about clients on Coordinated Entry queues. The report will contain the following information in a table format per each Community Queue selected in the report parameters: ● Client Name and Unique ID ● Client Demographics – gender, age, race and ethnicity, veteran status, social security number ● Assessment Date ● Days on Queue	Use this report when you are curious about clients currently on Community Queues.

Agency Management Reports

Report Name	Report Description	Examples of When to Use this Report
[STFF-103] Staff Active Caseload* *This report was previously called the User Active Caseload and was updated as of 7/7/25*	This report offers a detailed look at a user's current caseload. For this report, a staff member is considered assigned to an enrollment based on the Assigned Staff selection in the program enrollment. The default value for the Assigned Staff is the user that created the enrollment record. The report will display all clients with active enrollments who are assigned to the selected staff. The webpage report output format was built with drilldown functionality so you can click into different sections to see more details across three drilldown tables. 1. The Assessment Table includes assessment name, date and score. 2. The Services Table includes the service category, service name & service item, delivery type, start and end dates, total service days and expenses (if applicable). 3. The Case Notes Table displays the case note title, category, date, time tracking (when applicable) and the full case note The report contains: ● Assigned Staff, Program Name ● Clients Name, Unique ID, DOB, Relationship to HH member ● Start Date, Length of Stay (LOS). ● Total number of assessments, services and case notes provided	This report can be useful when: ● A supervisor needs to know the number of clients that each Case Manager has on their caseload ● Length of Stay (LOS) for current clients in case load. ● View assessments, services, and case notes for clients with active enrollments assigned to a selected staff member
[STFF-104] Staff Client Data Activity Report	This is a highly useful report for managers because it displays everything that a selected staff/users have documented or entered in the system during a period. The report is sorted alphabetically by staff name. The report will contain: ● Date Range ● Staff Name ● Client Name, Unique ID, Date/Time The type of activities that the report displays are: Assessment, Client Contact Created, Client Contact Edited, Client Field Interaction, Client File, Client Location, Client Note, Client ROI, Coordinated Entry Event, Profile Created, Profile Edited, Program Annual Update, Program Current Living Situation, Program Enrollment, Program Exit, Program Follow-up, Program Status Update, Referral Service Provided/Updated, Unit/Bed Assignment.	This report can be useful for: ● Viewing what types of activity staff members have done in the system during a particular period ● Identifying issues in workflow processes -and additional opportunities for training. ● General monitoring of staff's use of Clarity.

Client Reports

Note: Client Reports are run for a single client. They are in the client's profile screen. Look for the little printer on the right side of the screen.

Report Name	Report Description	Examples of When to Use this Report
[CLNT-101] Case Notes	This report provides all the case notes that have been recorded for the client within a given timeframe linked to a certain project enrollment or standalone notes. The report contains: • Select demographic information (Name, DOB, SSN, etc.) at the top of the page. • Each note in the report will include the note title, agency name, staff name, and date recorded.	This report can be useful to: • Analyze client's engagement or progress with a service provider. • Print case notes and attach it to a case file (Always protecting the client's personal information)
[CLNT-102] Client History	This report is run for an individual client. It provides a history of services provided and program enrollments for a user-selected reporting period. As a client-based report, it must be run from the client's profile screen.	This report can help you answer the following questions: • What programs was a client enrolled in during a specific time? • What types of services did a client receive during a specific time? • Which program enrollments and/or services are still active (i.e., do not have an End Date)?
[CLNT-125] Client Summary	This report provides an overview of the client's history in the system. The information is pulled from the current profile screen data. This report is divided 5 sections: • **General Information** – It contains demographic information, first time entered in HMIS, CH Status, disability info, DV status, HH Info. • **Location/Contact Information** – Client location • **Housing Information – LOS** in each project and project type that client has an enrollment • **Coordinated Entry Information** – Housing Assessment date, Queue List, pending referrals, program denials. • **Agencies that provided services** – List of all orgs that the client was served and the year of the service provided	This report can be useful for: • Viewing general, demographic client information or any enrollment/assessment information. • Finding out if a client meets the Chronicity definition. • Knowing the agencies and the years that have a client has been served. • Knowing if the client is part of CE.
[CLNT-104] Profile Screen	This client-based report pulls basic demographic data from the Profile Screen, including HUD-required Data Quality fields for Name, Date of Birth, and Social Security Number. The report includes Gender, Race and Ethnicity, and Veteran Status.	This report can help you answer the following questions: • Does the client have complete demographic information entered? • Are there data quality issues with the Profile Screen?

[CLNT-127] Homeless Status Timeline [2024]	This report provides a chart indicating the client's HMIS enrollments throughout a specific date range. It displays the months the client was active in each program. The report contains: ● Agency, Client Name, Client Unique ID, Date Range. ● All HMIS enrollments in one row for each program that was active during the date range. ● Client Housing Move-In Date ● Data displayed using colored boxes and/or abbreviation symbols within boxes that each represent one month. ● Whether a client can be counted as homeless according to the HUD definition	This report can be useful when: ● Determining if a client meets the requirements to be considered a Chronically Homeless individual. ● Wanting to know when the client moved into a unit (Housing Move-In Date). ● Knowing the projects and dates when a client was served.
[CLNT-106] Client Service Notes	This report provides a list of the service notes that have been recorded during a specific date range. The report contains: ● Client Name, SSN, Quality of SSN, DOB, Quality of DOB, Unique ID, Start and End Date ● A list of service notes.	This report can help you answer the following questions: ● What kind of notes are being entered in client services?