Quick Guide: Determining if your Program's current clients are Active in CE System Agency

Case managers and program managers should review the list of their clients to make sure if they are enrolled in the CE System Program and that they have an active HTT (VI-SPDAT) assessment. This is important to track because clients will not be on the Priority Pool if they do not have active assessments even if they are enrolled in the CE System Program.

Below are the basic steps to retrieve this information from Clarity by **running a Program Roster report from both their agency's program(s) and the CE Assessment Details Report [GNRL-404].**

Obtaining the Data

Running the Program Roster Report - [GNRL- 106] for your own Agency Steps:

1. **Under your home agency in HMIS –** Visible under your name (locate the small down arrow and select agency).
2. **From the Launchpad** (cube to left of the email icon) - click into Reports

3. **Click on Program Based Reports –**

REPORT LIBRARY	
Administrator Reports	1 report(s) ⌄
Agency Management	4 report(s) ⌄
Agency Specific	1 report(s) ⌄
Assessment Based Reports	1 report(s) ⌄
Community and Referrals	5 report(s) ⌄
Data Quality Reports	3 report(s) ⌄
Housing	5 report(s) ⌄
HUD Reports	6 report(s) ⌄
Program Based Reports	24 report(s) ⌄
Service Based Reports	13 report(s) ⌄

4. **Select Program Roster Report** - [GNRL - 106] and RUN

[GNRL-106] Program Roster   ⊙ RUN | 🗓 SCHEDULE | MORE INFO⌄

5. **Choose your Status Parameters –**
   a. Select which program(s) you wish to review:
   b. Select Status - "Active within Report Date Range"
   c. Select Report Date Range - to begin & end on tomorrow's date
   d. Select Report Output Format - Excel

Status	Active within Report Date Range		⌄
Report Date Range	⬤2020 📅 — ⬤2020		📅
Report Output Format	○ Web Page ○ PDF ⦿ Excel		

6. **Submit your request** – the report may take a few minutes to process

Running the Program Roster Report - [GNRL- 106] for the CE System Agency:
1. **Under the CE agency in HMIS –** Visible under your name (locate the small down arrow and select the Coordinated Entry System agency).
2. **From the Launchpad** (cube to left of the email icon) - click into Reports

3. **Click on Program Based Reports –**

REPORT LIBRARY	
Administrator Reports	1 report(s) ⌄
Agency Management	4 report(s) ⌄
Agency Specific	1 report(s) ⌄
Assessment Based Reports	1 report(s) ⌄
Community and Referrals	5 report(s) ⌄
Data Quality Reports	3 report(s) ⌄
Housing	5 report(s) ⌄
HUD Reports	6 report(s) ⌄
Program Based Reports	24 report(s) ⌄
Service Based Reports	13 report(s) ⌄

4. **Select Program Roster Report** - [GNRL - 106] and RUN

[GNRL-106] Program Roster   ⊙ RUN | 📅 SCHEDULE | MORE INFO⌄

5. **Choose your Status Parameters –**
   e. Select which program(s) you wish to review:
   f. Select Status - "Active within Report Date Range"
   g. Select Report Date Range - to begin & end on <u>tomorrow's date</u>
   h. Select Report Output Format - Excel

Status	Active within Report Date Range		⌄
Report Date Range	⬤2020 📅 — ⬤2020		📅
Report Output Format	○ Web Page ○ PDF ⦿ Excel		

7. **Submit your request** – the report may take a few minutes to process

Running the CE Assessment Details Report - [GNRL- 404] for the CE System Agency Steps:

1. **Navigate to the Coordinated Entry System Agency -** Your ability to switch to the Coordinated Entry System Program is located under your name (locate the small down arrow and select agency).
2. **From the Launchpad** (located next to the email icon) - click into Reports
3. **Click on Assessment Based Reports**
4. **Select CE Assessment Details Report - [GNRL- 404] and RUN**
5. **Choose your Status Parameters –**
    a. Select Assessments – CE assessments options or select ALL
    b. Select Assessment User - Select all assessessors
    c. Select Report Date Range - 1/1/2018 to Today's date
    d. Select Report Output Format - Excel

6. **Submit your request** – the report may take a few minutes to process

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<p style="text-align:center; color:#4a86c8">Data Analysis</p>

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1) Download information to a secure computer with Excel.
2) Open the supplied "CESP-Agency_Program-Crosswalk_Template.xlsx" workbook.
3) Open your agency's Program Roster Report - [GNRL- 106]
    a. Verify you are viewing the Data sheet section of the workbook:

    b. Copy the entire contents of the Data sheet by clicking on any cell and typing Ctrl+A twice and then Ctrl+C
4) Navigate to the "CESP-Agency_Program-Crosswalk_Template.xlsx" workbook
    a. Verify you are viewing the "Agency_Program" sheet section of the workbook:
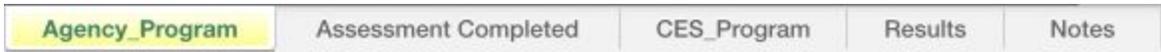
    b. Paste the contents of the clipboard by clicking on any cell and typing Ctrl+A and then Ctrl+V
5) Close your agency's Program Roster Report - [GNRL- 106]
6) Open the **CE Assessment Details Report - [GNRL- 404]**
    a. Verify you are viewing the Data sheet section of the workbook:

    b.
    c. Copy the entire contents of the Data sheet by clicking on any cell and typing Ctrl+A twice and then Ctrl+C
7) Navigate to the "CESP-Agency_Program-Crosswalk_Template.xlsx" workbook
    a. Verify you are viewing the "Assessment Completed" sheet section of the workbook:

    b. Paste the contents of the clipboard by clicking on any cell and typing Ctrl+A and then Ctrl+V
8) Close the **CE Assessment Details Report - [GNRL- 404]**
9) Open your **Coordinated Entry System Agency Program Roster Report - [GNRL- 106]**
    a. Verify you are viewing the Data sheet section of the workbook:

    b. Copy the entire contents of the Data sheet by clicking on any cell and typing Ctrl+A twice and then

Ctrl+C
10) Navigate to the "CESP-Agency_Program-Crosswalk_Template.xlsx" workbook
   a. Verify you are viewing the "CES_Program" sheet section of the workbook:
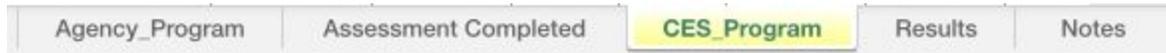
| Agency_Program | Assessment Completed | **CES_Program** | Results | Notes |

   b. Paste the contents of the clipboard by clicking on any cell and typing Ctrl+A and then Ctrl+V
11) Close your agency's **Program Roster Report - [GNRL- 106]**
12) Navigate to the "CESP-Agency_Program-Crosswalk_Template.xlsx" workbook
   a. Verify you are viewing the "Results" sheet section of the workbook (please note this sheet is locked for editing, you may copy data out of it using Ctrl+C):

| Agency_Program | Assessment Completed | CES_Program | **Results** | Notes |
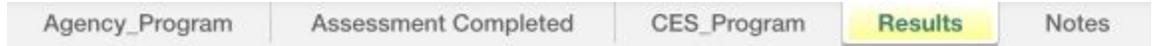
13) Review the clients enrolled in CE System Program but do not currently have an enrollment in CE System Agency, or, have an enrollment, but are missing an HTT.

Data Quality Check

If you notice that your client has been exited from CE System Program that would be due to one of two factors: they exited to a housed destination, or their enrollment was closed due to inactivity. In both situations, follow the below steps:

1. Review the exit destination to determine exit reason.
2. If still in need, create a <u>new</u> CE Program Enrollment using the steps in the CE Assessor Manual.