How to Guide for Accessing Coordinated Entry Reports

VI-SPDAT

1. Log in to HMIS using the **"2020 Coordinated Entry"** workgroup and your **"Coordinated Entry Region #"** as the organization.
2. From the **"Home"** dashboard, click the **"Clients"** icon on the left-hand side of the screen.
3. Click on **"Assessments"** to expand the menu.

4. *After the menu expands click on* **"SPDAT & VISPDAT"** *and then* **"VI-SPDAT"**. ***PLEASE NOTE: The "SPDAT and F-SPDAT" options are not functional since the IN BoS CoC does not utilize the full SPDAT tools.***
5. During this tutorial, we will choose the **"VISPDAT"**.

September 2023

6. A report will display with Household Type, Assessment Date, Total Score, and Category Scores.
7. To view the VI-SPDAT assessment, click the three dots to the left of the record and then select **"Edit/View Single Adult"** in the pop-up menu (this will take you to the actual completed VI-SPDAT for the Client).

Prioritization List

1. From the **"Home"** workspace, locate the **"Prioritization List"** function in the menu on the left-hand side of the screen.
2. Click on **"Prioritization Lists"**. The menu will expand below, click on **"Prioritization List"** to open the report.
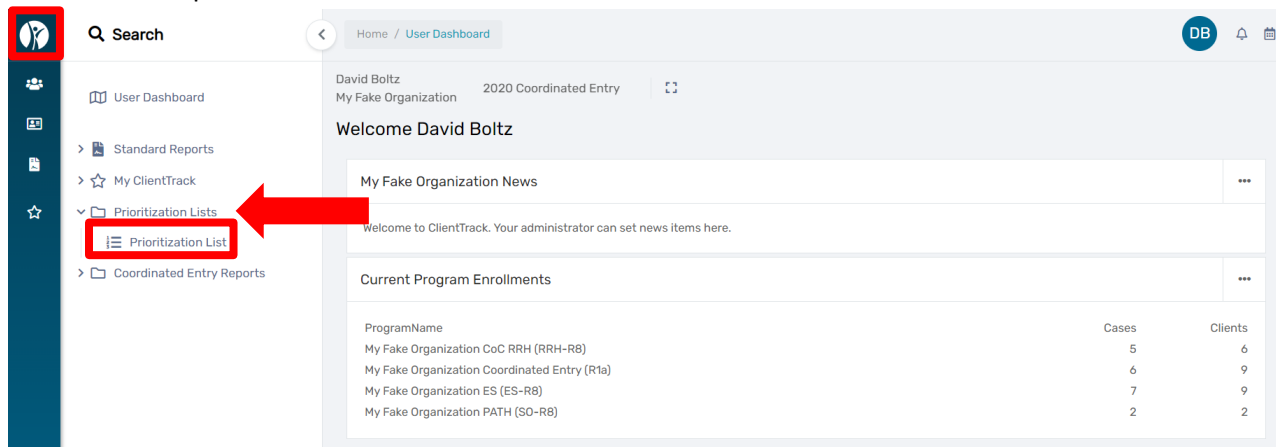
3. Choose your **"Coordinated Entry Region #"** from the **"Program"** drop down menu.
   a. You can also sort by *Family Type, VISPDAT Range, Referred, Days Homeless and/or Veteran Status* by clicking on the corresponding drop-down menu then clicking on the sort choice you want to see in the report.
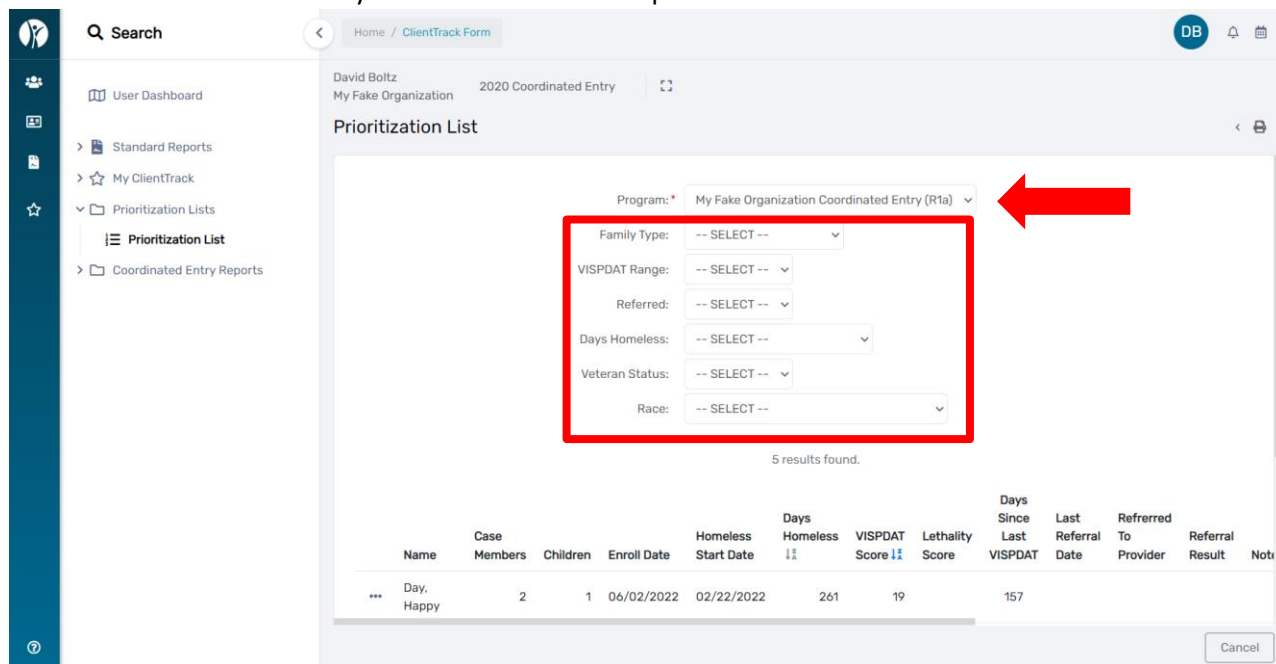
4. Columns with a ⬆⬇ displayed in the heading can be sorted by clicking on the ⬆⬇ .

5. In the screenshot below, we will sort the **"Days Since Last VISPDAT"** column by clicking on the **text**. This will sort in ascending order, click one more time for descending order.

6. In descending order, the list will sort and display the highest number of **"Days Since Last VISPDAT"** starting at the top. This sorting tool is helpful when monitoring your Prioritization List for Clients which require a new VI-SPDAT. **(All Coordinated Entry Clients are required to complete a new VI-SPDAT every 90 days to ensure we have their current information.)**

7. Export the **"Prioritization List'** by clicking on the **"Excel Data Export"** icon located at the top right corner of the page. The icons can be identified by hovering your cursor over each choice. A small pop-up window will appear with the identifying information for each icon.

Custom_VW_PrioritizationList_ClientID	Custom_VW_PrioritizationList_ProgramName	Custom_VCT_Priorit	Custom_V		Custom_VW_PrioritizationList_Name	Custom_V	Custom_VW_PrioritizationList_NoCaseMembers	Custom_VW_PrioritizationList_NoChildren	Custom_VW_PrioritizationList_EnrollDate	Custom
572	My Fake IHCDA Coordinated Entry (R1)	1	1		CE, Test	Self	1	0	9/27/2016 12:00 AM	
582	My Fake IHCDA Coordinated Entry (R1)	2			Family, Adult	Self	2	1	9/28/2016 12:00 AM	
574	My Fake IHCDA Coordinated Entry (R1)	2			Family 1, CE	Self	2	1	9/28/2016 12:00 AM	
631	My Fake IHCDA Coordinated Entry (R1)	1			test, TEst	Self	1	0	5/15/2017 12:00 AM	
641	My Fake IHCDA Coordinated Entry (R1)	1			Monday, Tired	Self	1	0	2/20/2018 12:00 AM	
796	My Fake IHCDA Coordinated Entry (R1)	1			Client, Ima Lee	Self	1	0	6/6/2017 12:00 AM	
794	My Fake IHCDA Coordinated Entry (R1)	1			Webster, Bob	Self	1	0	6/6/2017 12:00 AM	
792	My Fake IHCDA Coordinated Entry (R1)	1			Client, Ima	Self	1	0	6/6/2017 12:00 AM	
798	My Fake IHCDA Coordinated Entry (R1)	1	27	907	Client, Ima	Self	1	0	6/6/2017 12:00 AM	
803	My Fake IHCDA Coordinated Entry (R1)	2			Doe, Jane	Self	1	1	6/7/2017 12:00 AM	
805	My Fake IHCDA Coordinated Entry (R1)	1			Chan, Jackie	Self	1	0	6/7/2017 12:00 AM	
806	My Fake IHCDA Coordinated Entry (R1)	1			Perry, Jamie	Self	1	0	6/7/2017 12:00 AM	
804	My Fake IHCDA Coordinated Entry (R1)	1		908	Jacket, Gene	Self	1	0	6/7/2017 12:00 AM	
795	My Fake IHCDA Coordinated Entry (R1)	2			Jones, Sue	Self	1	1	6/6/2017 12:00 AM	
808	My Fake IHCDA Coordinated Entry (R1)	1			Family, Test	Self	1	0	6/13/2017 12:00 AM	
810	My Fake IHCDA Coordinated Entry (R1)	2			Two, Guest	Self	1	1	6/19/2017 12:00 AM	
809	My Fake IHCDA Coordinated Entry (R1)	1			Intake, Test	Self	1	0	6/14/2017 12:00 AM	
799	My Fake IHCDA Coordinated Entry (R1)	1			Doe, Jane	Self	1	0	6/6/2017 12:00 AM	
797	My Fake IHCDA Coordinated Entry (R1)	1	19		Queen, Oliver F	Self	1	0	6/6/2017 12:00 AM	
812	My Fake IHCDA Coordinated Entry (R1)	1			New Workflow, Testing	Self	1	0	6/27/2017 12:00 AM	
800	My Fake IHCDA Coordinated Entry (R1)	1			Jerome, Jesse	Self	1	0	6/6/2017 12:00 AM	
619	My Fake IHCDA Coordinated Entry (R1)	1	11		Client, CE	Self	1	0	11/7/2016 12:00 AM	
835	My Fake IHCDA Coordinated Entry (R1)	1		924	Green, Alex	Self	1	0	7/12/2017 12:00 AM	
832	My Fake IHCDA Coordinated Entry (R1)	1		929	Chan, Jackie	Self	1	0	7/12/2017 12:00 AM	
830	My Fake IHCDA Coordinated Entry (R1)	1		920	Patch, Cabbage	Self	1	0	7/12/2017 12:00 AM	
822	My Fake IHCDA Coordinated Entry (R1)	1			client, test1	Self	1	0	2/23/2023 12:00 AM	
841	My Fake IHCDA Coordinated Entry (R1)	1		927	Batts, Joe	Self	1	0	7/12/2017 12:00 AM	
838	My Fake IHCDA Coordinated Entry (R1)	1		919	MONROE, JAMES	Self	1	0	7/12/2017 12:00 AM	
820	My Fake IHCDA Coordinated Entry (R1)	1		925	Obama, Michelle	Self	1	0	7/12/2017 12:00 AM	
833	My Fake IHCDA Coordinated Entry (R1)	1		921	Ross, Diana	Self	1	0	7/12/2017 12:00 AM	
836	My Fake IHCDA Coordinated Entry (R1)	1		926	WILLS, JAMES	Self	1	0	7/12/2017 12:00 AM	
859	My Fake IHCDA Coordinated Entry (R1)	1			Doe, Joe	Self	1	0	7/26/2017 12:00 AM	
856	My Fake IHCDA Coordinated Entry (R1)	1			Brady, Greg	Self	1	0	7/26/2017 12:00 AM	
868	My Fake IHCDA Coordinated Entry (R1)	1			Brady, Marsha K	Self	1	0	7/26/2017 12:00 AM	
864	My Fake IHCDA Coordinated Entry (R1)	1			head, noodle	Self	1	0	7/26/2017 12:00 AM	
863	My Fake IHCDA Coordinated Entry (R1)	1			Pickle, Sweet	Self	1	0	7/26/2017 12:00 AM	
860	My Fake IHCDA Coordinated Entry (R1)	1			Duck, Bob	Self	1	0	7/26/2017 12:00 AM	
867	My Fake IHCDA Coordinated Entry (R1)	1			Sue, Curly	Self	1	0	7/26/2017 12:00 AM	
883	My Fake IHCDA Coordinated Entry (R1)	1		966	Angel, Sweet	Self	1	0	8/3/2017 12:00 AM	
866	My Fake IHCDA Coordinated Entry (R1)	1			Ramsey, Lois	Self	1	0	7/26/2017 12:00 AM	
1326	My Fake IHCDA Coordinated Entry (R1)	1		4030	Watch, Sara	Self	1	0	8/17/2017 12:00 AM	
1334	My Fake IHCDA Coordinated Entry (R1)	1			Ducky, Daffy	Self	1	0	8/29/2017 12:00 AM	

CE Length of Stay Report (Detail and Summary)

8. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
9. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Length of Stay Report-Detail"** to open the report.
10. Type in the **"From Date"** and **"To Date",** select the **"Program",** then click **"Report"** located in the bottom right corner.

11. The report will appear as seen below. You can export the report into Excel Data, PDF or Word by clicking on the small disc icon located at the top of the report.
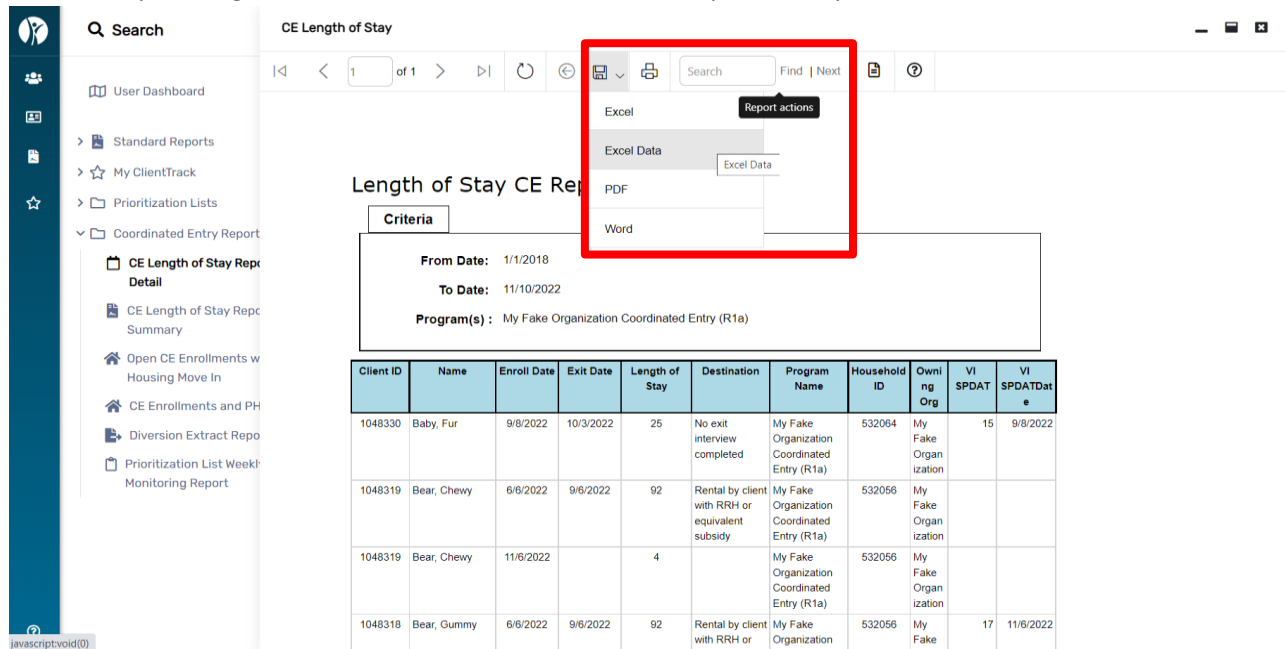
"CE Length of Stay Report Summary"

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Length of Stay Report Summary"** to open the report.
3. Type in the **"From Date"** and **"To Date",** select the **"Program",** then click **"Report"** located in the bottom right corner.
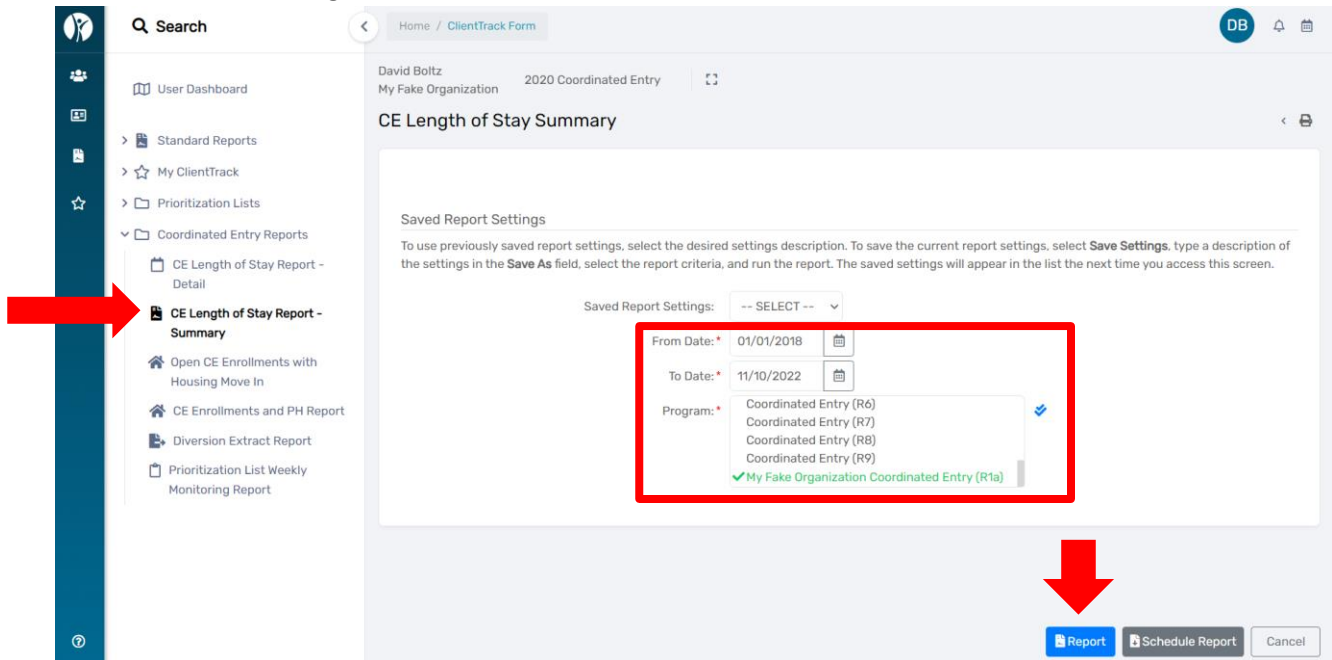

12. The report will appear as seen below. You can export the report into Excel Data, PDF or Word by clicking on the small disc icon located at the top of the report.
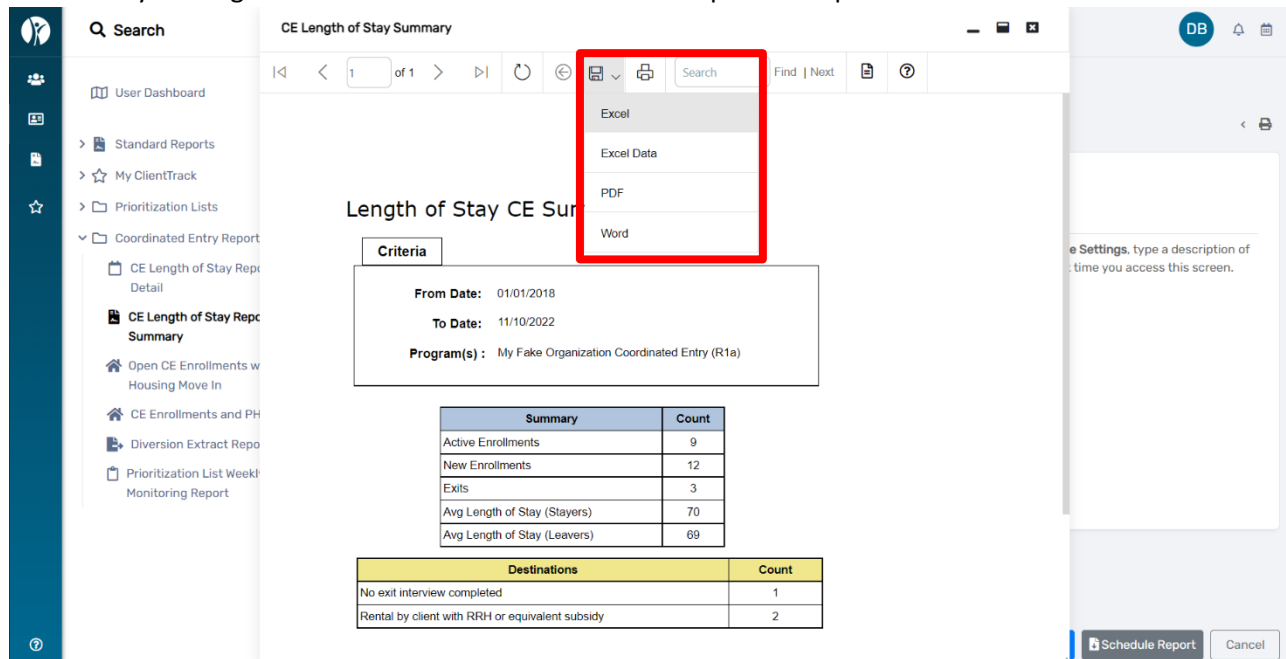
How to Guide for Accessing Coordinated Entry Reports

"Open CE Enrollments with Housing Move In"

1. From the **"Home"** workspace, click on the **"Coordinated Entry Reports"** tab in the menu on the left-hand side of the screen.
2. The menu will expand below, click on **"Open CE Enrollments with Housing Move In"** to open the report.
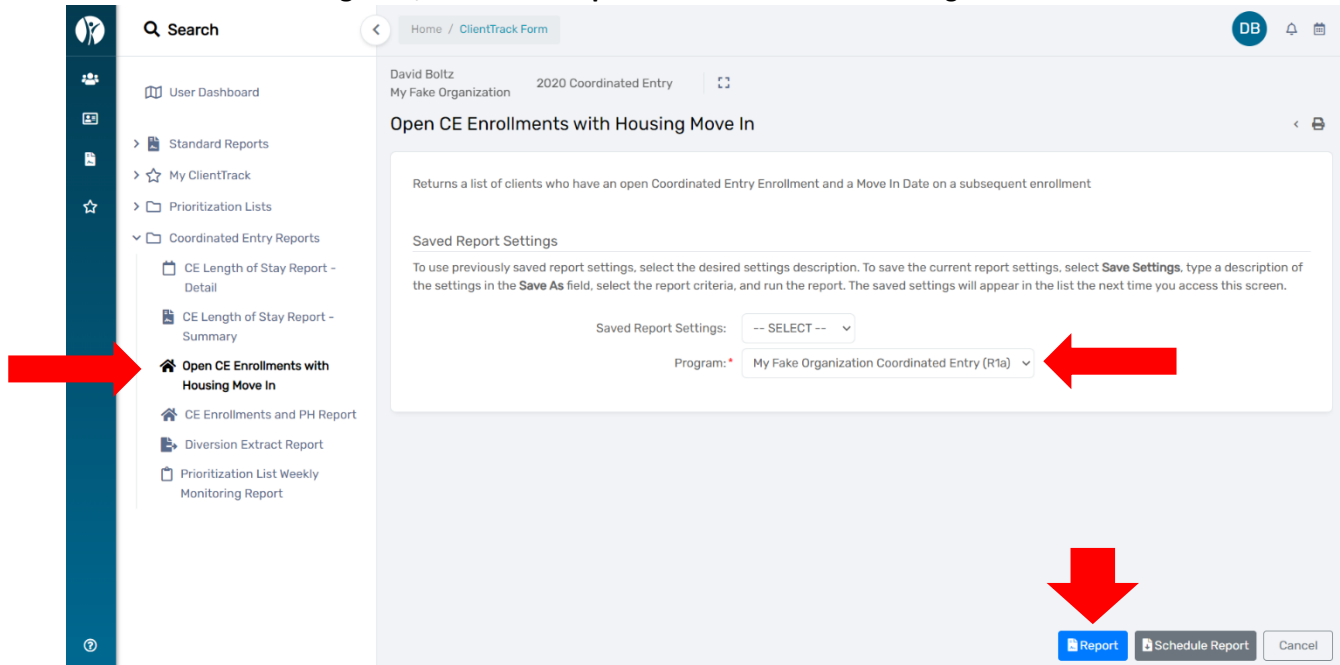3. Select the **"Program"**, then click **"Report"** located in the bottom right corner.

13. The report will appear as seen below. You can export the report into Excel Data, PDF or Word by clicking on the small disc icon located at the top of the report.
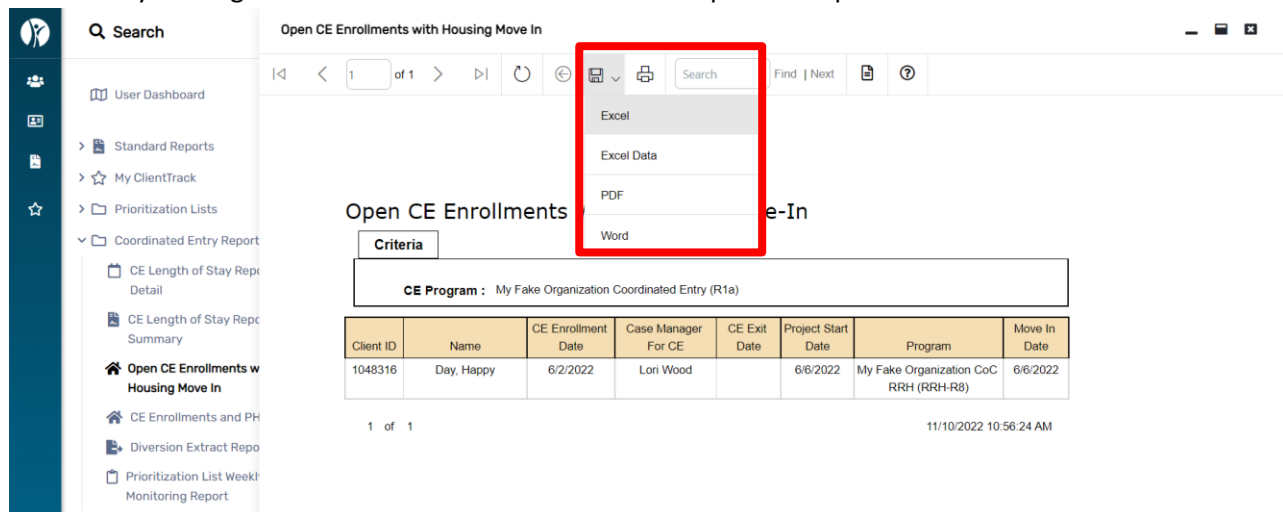

14. The clients listed on this report have a **"Housing Move-In Date"** but have **_NOT_** been exited from **"Coordinated Entry"**. Please find the Client's CE HMIS record and exit the Client from their open **"Coordinated Entry"** enrollment as of their **"Housing Move-In Date"**.

How to Guide for Accessing Coordinated Entry Reports

"CE Enrollments and PH Report"

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.

2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Enrollments and PH Report"** to open the report.

3. Enter the **"Enroll From Date"** and **"Enroll To Date"**, choose the **"Organization"** from the list or Organizations displayed, choose the **"Program(s)"** you wish to view, then click **"Report"** located in the bottom right corner.
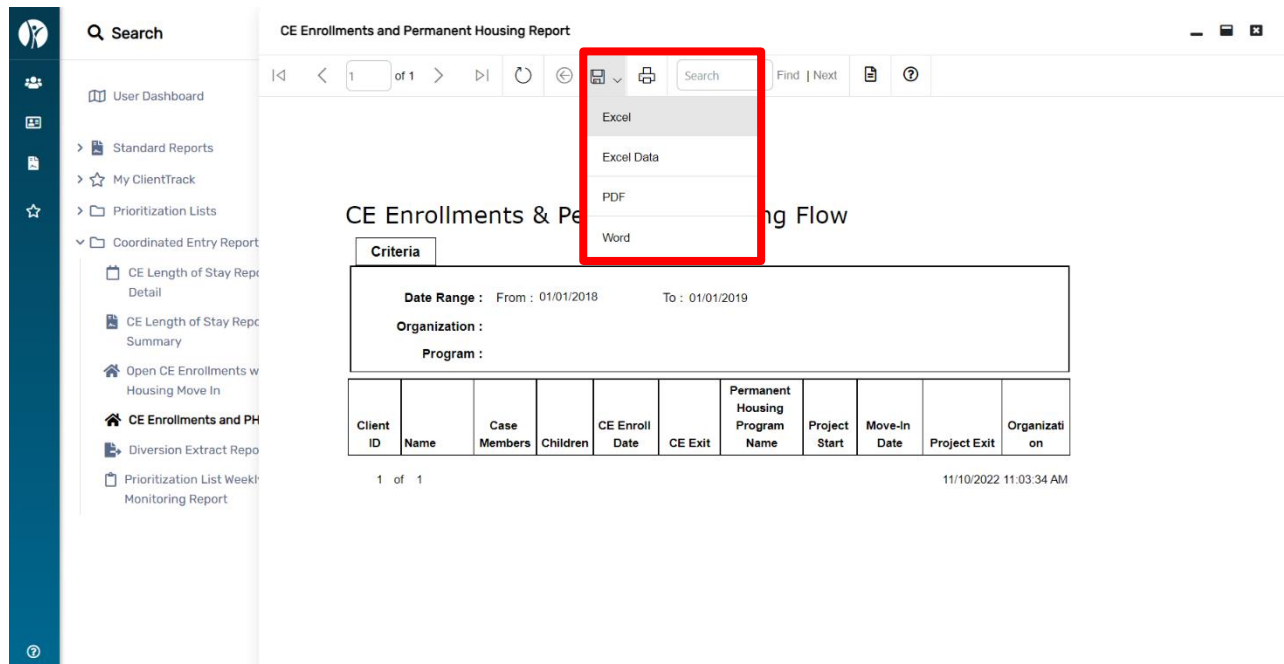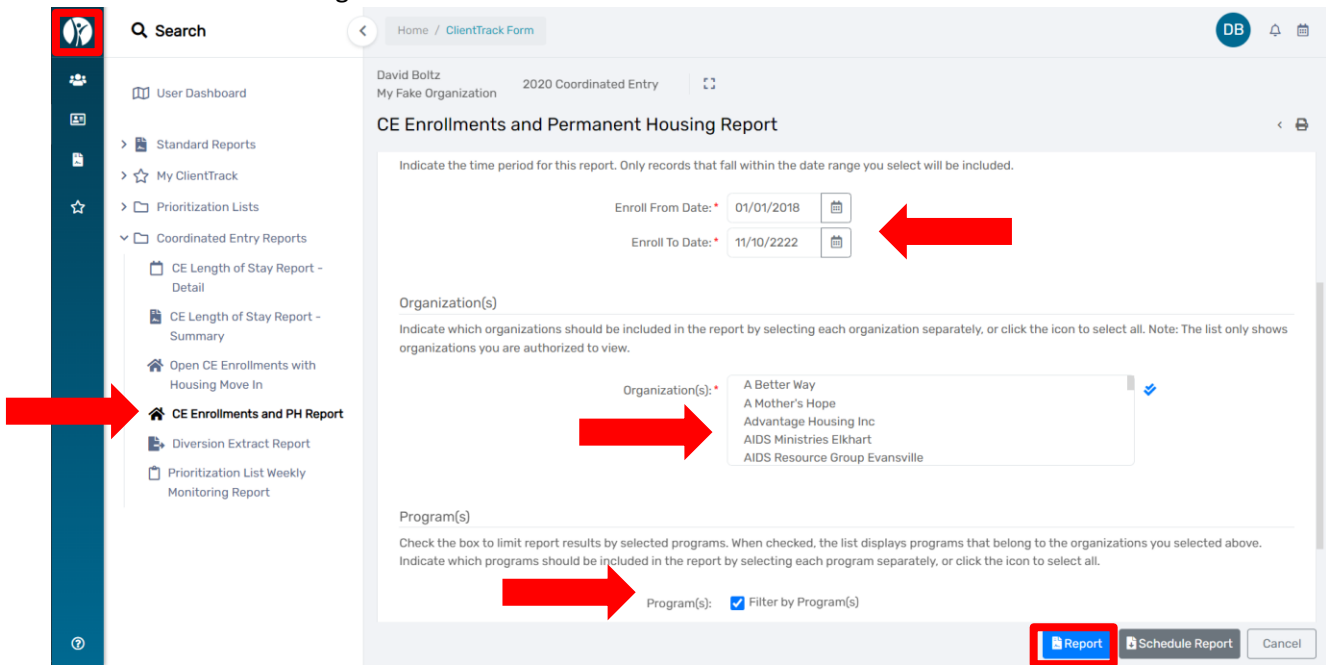
4. The report will display as shown above. This is a helpful tool to track the length of time between enrollment in Coordinated Entry and the Housing Move-In Date. Again, the report can be exported to Excel Data, PDF or Word by clicking on the floppy disc icon.

"Diversion Extract Report"

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"Diversion Extract Report"** to open the report.
3. Choose the **"Organization(s)"** from the list or Organizations displayed, choose the **"Region"** you wish to view, then click **"Report"** located in the bottom right corner.

4. The report will display as shown above. This tool is helpful in reviewing the success of Diversion. The report can be exported to Excel Data or PDF.

CE Diversion Extract

CE Diversion Extract - Export to Excel for Full Data Set
11/10/2022 11:07 AM

ClientTrack™

Report Criteria:
    Region: 1
    Org ID: My Fake Organization

10/27/2022	1	My Fake Organization
10/27/2022	1	My Fake Organization
3/10/2022	1	My Fake Organization

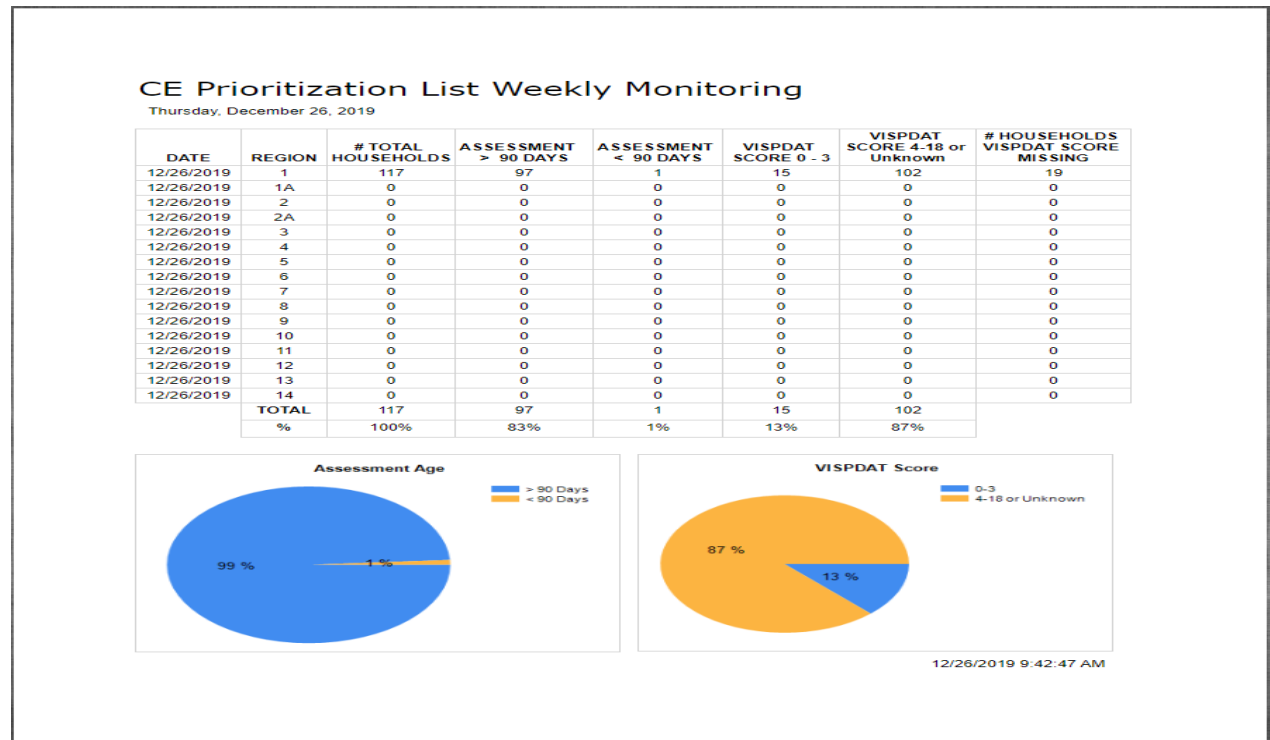   David Boltz
ClientTrack™ Reports   11/10/2022 11:07 AM

5. Once exported to Excel, a zero (0) indicates "No" and a one (1) indicates "Yes".

6. **"Prioritization List Weekly Monitoring Report"** - From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
7. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"Prioritization List Weekly Monitoring Report"** to open the report.
8. *All regions are included in this report*. This tool is helpful in monitoring your region's CE enrollments for Clients with VI-SPDAT assessments older than 90 days.

CE Prioritization List Weekly Monitoring
Thursday, December 26, 2019

DATE	REGION	# TOTAL HOUSEHOLDS	ASSESSMENT > 90 DAYS	ASSESSMENT < 90 DAYS	VISPDAT SCORE 0 - 3	VISPDAT SCORE 4-18 or Unknown	# HOUSEHOLDS VISPDAT SCORE MISSING
12/26/2019	1	117	97	1	15	102	19
12/26/2019	1A	0	0	0	0	0	0
12/26/2019	2	0	0	0	0	0	0
12/26/2019	2A	0	0	0	0	0	0
12/26/2019	3	0	0	0	0	0	0
12/26/2019	4	0	0	0	0	0	0
12/26/2019	5	0	0	0	0	0	0
12/26/2019	6	0	0	0	0	0	0
12/26/2019	7	0	0	0	0	0	0
12/26/2019	8	0	0	0	0	0	0
12/26/2019	9	0	0	0	0	0	0
12/26/2019	10	0	0	0	0	0	0
12/26/2019	11	0	0	0	0	0	0
12/26/2019	12	0	0	0	0	0	0
12/26/2019	13	0	0	0	0	0	0
12/26/2019	14	0	0	0	0	0	0
	TOTAL	117	97	1	15	102	
	%	100%	83%	1%	13%	87%	

Assessment Age

> 90 Days
< 90 Days

99 %   1 %

VISPDAT Score

0-3
4-18 or Unknown

87 %   13 %

12/26/2019 9:42:47 AM

Please contact the HMISHelpDesk@ihcda.IN.gov if you have questions or need additional information.