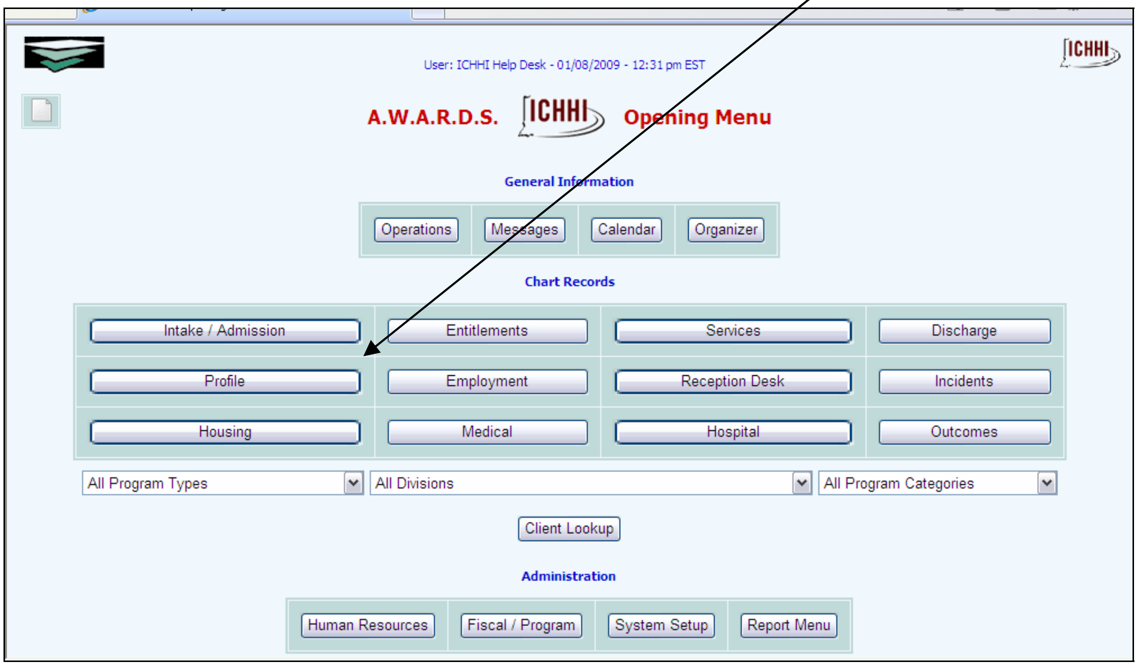
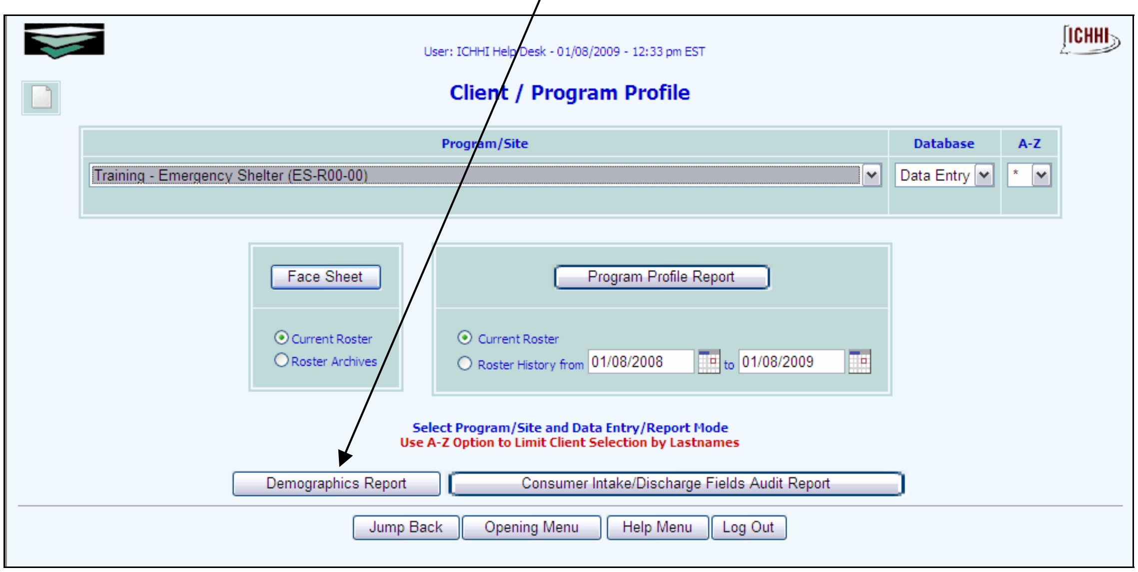
The Demographics Report

The Demographics Report is the most flexible report in HMIS when it comes to Intake and Discharge information. The Demographics Report contains all the fields from the Intake Page, all of the demographics fields from the Face Sheet, and all of the fields from the Discharge Page and lets you select whatever fields you want to run a report on. It also contains special formatting and filter options and provides nice summary tables of the data.

You can get to the Demographics Report by going to the Profile Menu,



selecting your program, and clicking on Demographics Report.



– You will first be asked to select the Date Range for the report. The default date range is 1 year from today. Anyone who entered your program between the dates that you enter will show up on your report along with anyone who was enrolled in your program on the Start Date that you entered. A client is considered to be enrolled in a program up until the date that they are discharged from that program.

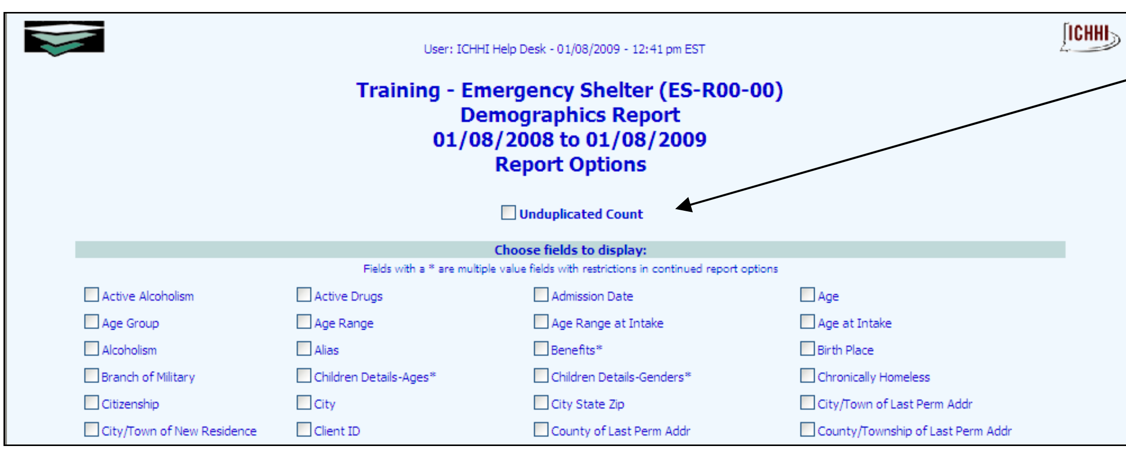
- Tip: To run a report on just the clients who are in your program today, change both the start date and the end date to tomorrow's date.

- You then have the option to Select a Saved Report, or Create a New Report. I will talk about Saved Reports a little bit later. To create a new report, press the Continue button.

Report Options

Duplicated vs. Unduplicated

- The first option on the Report Options page is the ability to run an Unduplicated Client Count. If you check this box then clients who have been discharged and readmitted within the date range will only be included in the report one time. If you run a duplicate client count they will counted each time they were readmitted. **Note:** Run an Unduplicated Count when you are looking at general demographics such as Race and Gender. Run a Duplicated Count when you are looking at information such as Length of Stay and Program Enrollment.



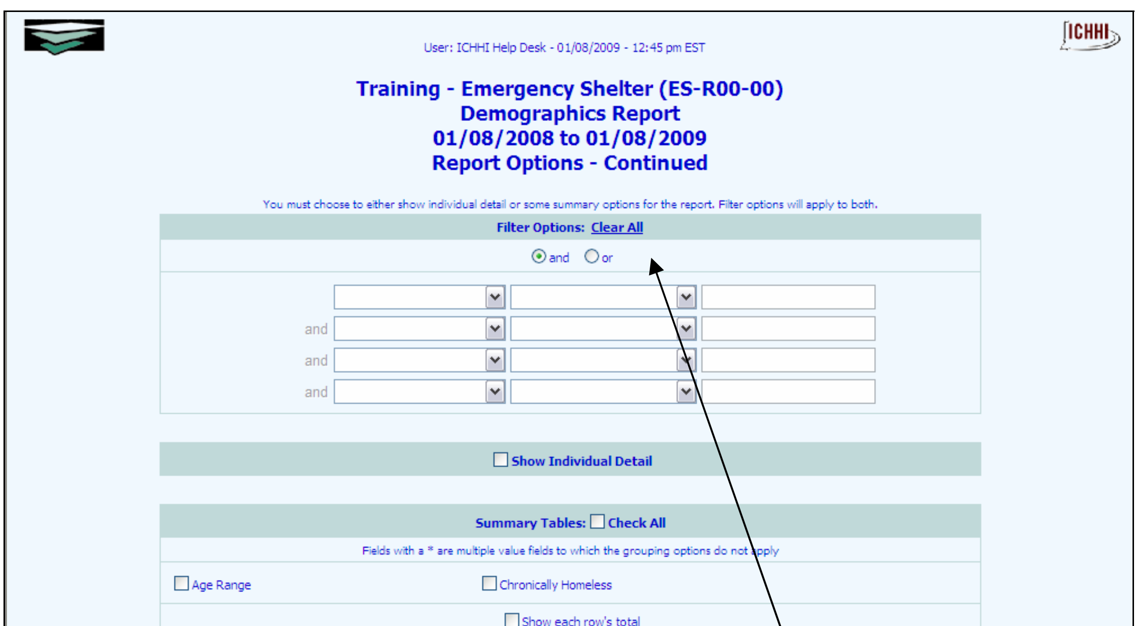
Field Selection List

- The checklist of fields on this page is an alphabetical list of all the fields found on the Intake Form, Discharge Form and the demographic sections of the Face Sheet. The fields are alphabetized from left to right. It can take some time to find the fields you want until you become familiar with this list.

Some Tips about the Choose Fields to Display list:

- Use the Name (Last, First) to include the clients' full name in your reports.
- Admission Date and Discharge Date are helpful fields in determining how long clients have been in your program and who still needs to be discharged.
- The Children Details-Genders can be used to give a total count of the children entered at Intake. Note that the Demographics Report does NOT contain information from the Household/Child Form, it only includes the children details entered on the first Intake form.
- The Street Address field will give you the client's Bed # or Unit # in a Residential Program or Shelter. For Non-Residential programs it will give you the Street Address that was entered under the External Housing section of the Face Sheet.
- Monthly Income at Admission will give you the total monthly income added up from each of the sources entered during intake. Monthly Income Sources at Admission
- Age Range is often more useful than Age because it groups clients into different age ranges for every decade. Also, Age at Intake gives you the clients age when they entered the program whereas Age gives you their age today.
- When in doubt include the field. You can always remove it later if it turns out not be a useful field.
- When you selected the program to run the report on, if you select All Agency Programs you will be given several Fields to select from that relate to the programs themselves including the name of the program and the type of program. These options will not show up if you only selected to run the report on a single program.

After selecting the fields you want to include in the report, press Continue to be taken to the Display Options Page.



Filter Options

- The first option on this page is the ability to add Filter Options. Filters allow you to narrow down your report based on the data stored in specific fields. Some common examples of filter options include:

  - Include only clients where their Gender equals Female.
  - Include only clients whose Discharge Date is Blank.
  - Include only clients whose Admission Date is Greater Than 1/1/08.
  - Include only clients where Veteran? equals Yes.

When you are including more than one Filter Option you can decide whether you want all the filter options to be true or just one of them to be true. If you just need one of them to be true for a particular client then select the OR option otherwise leave it on AND so that it will only report on clients who match all of the filters.

Individual Details

- The Show Individual Detail option will allow you to see a table with columns for all of the fields you selected, and rows for each of the clients in your report.

- As soon as you click the checkbox to Show Individual Details three new options become available related to the table of clients.
  - With Record Numbers numbers each line in the table of clients. It is usually helpful to have the Record Numbers present on your report.
  - Sort By allows you to sort the report by up to 4 elements. You can sort each element from A to Z or from Z to A. Sorting by Name (Last, First) is a common choice.
  - Field Display Order allows you to determine what order the columns of fields will be listed in. To change the default order click the button labeled Show Ordered Field List. You can then drag and drop the fields into the order you want them displayed.

Summary Tables

- Next is the ability to add Summary Tables to your report. Summary Tables provide quick and easy breakdown of any field. For example, a Summary Table for gender will tell you how many males and how many females are in your report. You can use the Check All option to add Summary Tables for every field you've selected, or you can manually check off what fields you want to have turned into a summary table.

Here is an example of Summary Table on Gender:

Gender	
Male	400
Female	392

- Note that some of the fields will not convert into a nice Summary Table. For example, Monthly Income will give you a different row for every different dollar amount someone had.

Grouping Options

- Below the Summary Tables are Grouped By options that allow you to group the Summary Tables by different fields.

  A Summary Table on Veteran Status that is grouped by Gender would look something like this.

	Gender: Male	Gender: Female
Veteran: Yes	50	12
Veteran: No	350	380

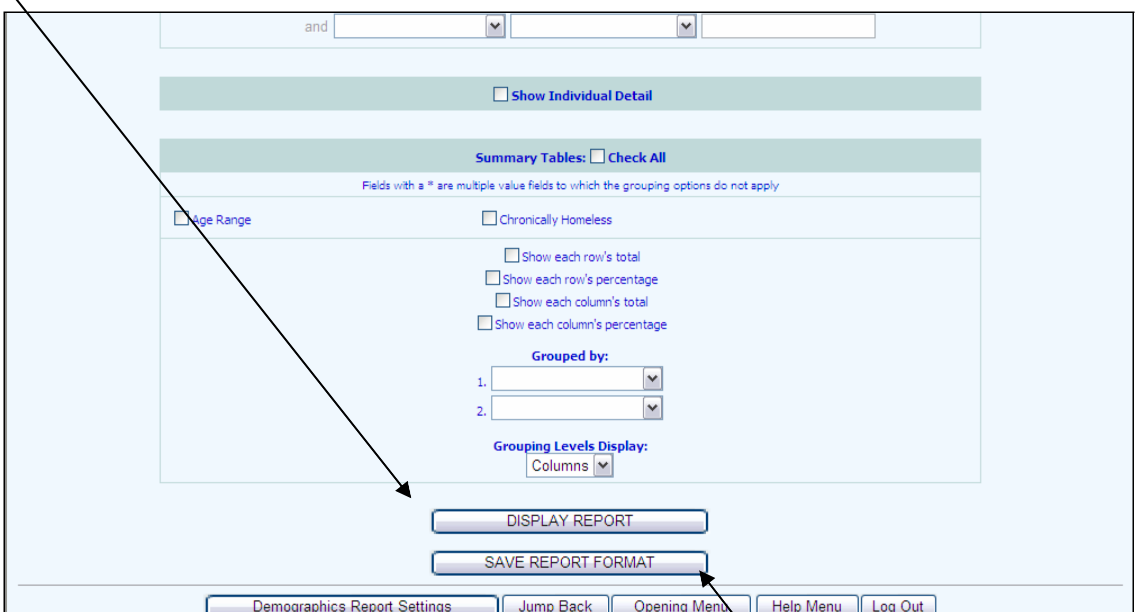
– When you use the Grouping Options with a Summary Table you can also choose to add column totals, row totals, column percentages, or row percentages.

– The Grouping Level Display option lets you choose whether you want the field you are choosing to Group By to be split up in columns across the top, or in rows down the side.

– Don't be afraid to experiment with the Demographics Report, especially if one of the options doesn't make sense. Try it out and see what results you get. If you don't like how something turns out just go back and try something else.

Running the Report

– After the fields are selected and all of the display options are set, click on Display Report to run the report. If you've selected a large date range or a big program it may take a while to run the report. **Note**: Once you start to run a report you need to let it finish running rather than trying to go do something else.
– When the report has run you'll see the name of the report, the Date Range, and any Filter options you choose. Below that there will be a link letting you export the report into **Excel®**. Then you'll see the Individual Details if you choose to display them along with a Total Client count underneath. Any Summary Tables that you selected will show up at the bottom.



Saving A Report

– If you do put together a report that you really like and find useful you have the ability to save that report format by clicking on the Save Report Format button right below the Display Report button. When you click on Save Report Format it will ask you to give the report a name. You will also have the option of saving the report for yourself or for all the staff at your agency, and the option to save the report for just this one program or for all the programs at your agency.
– If you do save a report, the next time you go into the Demographics Report that report will show up on the drop down at the beginning where it says Select A Saved Report.
– If you choose to run a Saved Report from the drop down of Reports you will be given the option of Modifying the Saved Report. This allows you to tweak the

reports that you have saved by adding or removing Fields or changing the formatting or Filters of the report. If you do not choose the option to modify the report, pressing Continue will run the report with the options you had previously selected and saved.

– If you decide to delete a saved report simply select it from the list and choose the option to Modify the Report and you will notice a button that says Delete Report Format next to the place where you found the Save Report Format button.

Final Comments

The Demographics Report is very handy because of its ability to allow the user to customize how the report comes out and select exactly what data is reported. The Demographics Report tends to be everyone's favorite report, but it can be overwhelming when you're first learning all of the options.

The Demographics Report does have some limitations. First of all, it only looks at the demographic information for the Head of Household, so it does not pull up any information about household members or children that you may have entered on the Household/Child section of the Face Sheet. The only report that deals with Household members is the Census Report. Secondly, the Demographics Report is not tied to any other sections of the database such as Services, Cash Assistance, or Employment Data. You are limited to the fields that you find on the Intake Form and Discharge Form with a few fields from the Face Sheet available as well.

Questions?

Please use the Help Desk button in the Help Menu if you encounter any glitches where something is not working the way you expect it to.

You can always contact your regional representative at 800-939-1617 or send a message to the HMIS Help Desk. To find out who your regional rep is, on the Opening Menu, there is an Information Link that you can follow to see a map of the State with all of the CoC regions and the contact information for each of the regional representatives as well as the HMIS office staff.