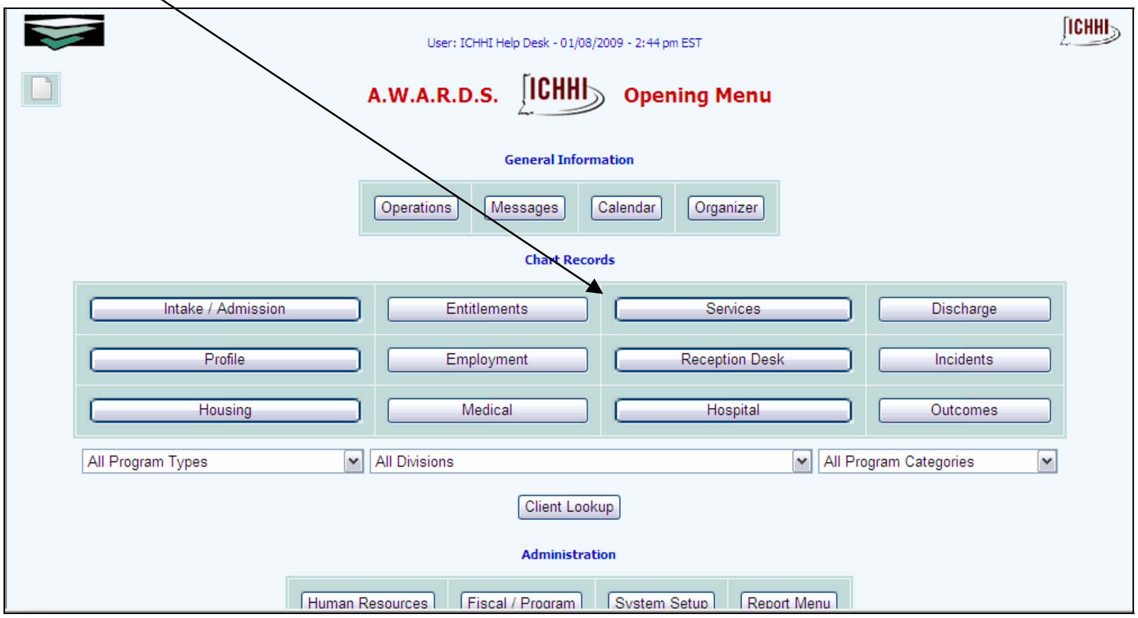
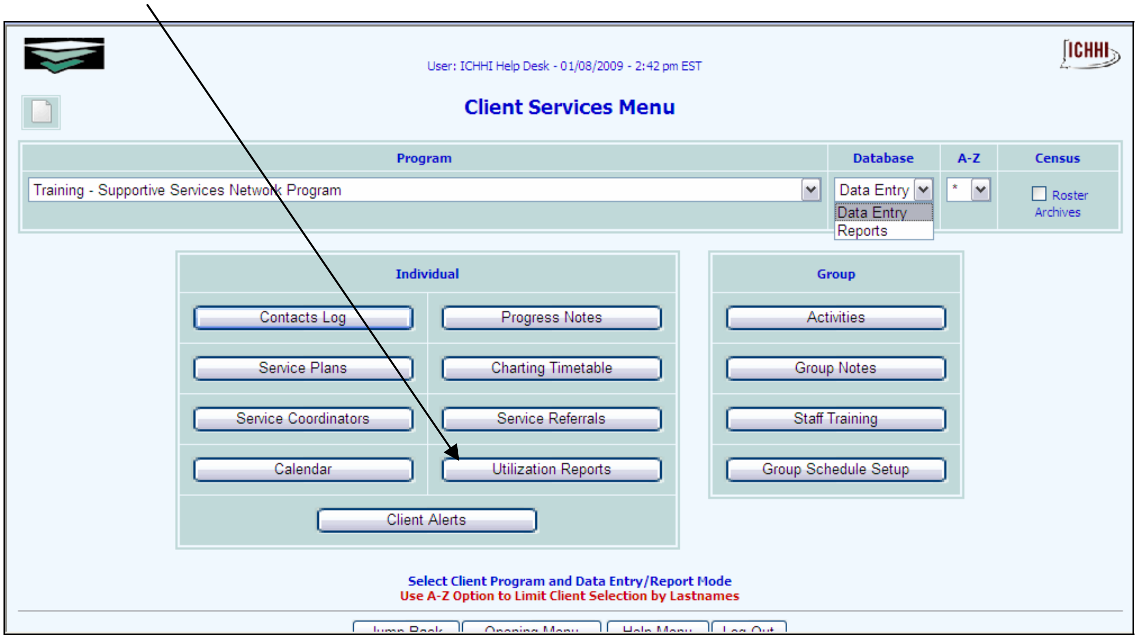
Service Utilization Reports

Service Utilization Report allow supervisors and agency executives to track the work that their Case Managers are doing. Utilization Reports can be found under the Services menu.



From the Services Menu first select the program you want to report on and then click Utilization Reports.



There are three different Utilization Reports to choose from:

Last Progress Note Audit Report

The Last Progress Note Audit Report tells you how long it has been since a progress note has been added for a client. If Case Managers are expected to enter regular case notes for their clients, this report will let you know what clients are getting missed. The report is grouped by Primary Worker (or Service Coordinator) and sorted by the client's last name. It shows the date of their last Progress Note, and the number of days (lapse) since the last note was written. If no note was written for a client it will say No Notes Since Admission and the client's intake date will be shown in the date field. If someone other than the Primary Worker left a note for a client then that client will be given an extra line and the name of the staff person who wrote the other note will be listed in the Other Writer column.

In parenthesis under the Case Manager's name it will show the total number of progress notes written with the last 15 days. Note that progress notes can be recorded under Progress Notes, Contact Logs, or Group Activities.

Contact Log Report

The Contact Log Report is different from the Supportive Services Delivery Report in that its purpose is to monitor the activities of the Case Managers rather than monitor the number and types of services provided to clients.

When you first enter the Contact Log Report you will be presented with several options. You can choose to run a report on all the workers or just one, on all the clients or just one, and you can choose the Date Range for the report. The default date range is 2 weeks.

The Individual/Group Contacts allows you to look beyond just the services recorded under Contact Logs (the default option) and include services that may have been recorded under Group Activities.

You can sort the report by Client, Worker, or Date.

To run the report click the Continue button at the bottom of the page.

If you run the report sorted by Worker it will group the report by the staff persons' names, show you each of the clients they worked with and the time they recorded working with each client. In red bold text below each grouping it will summarize the number of notes written by that staff worker, and the amount of time that they recorded working with clients.

If you run the report sorted by Client it will summarize in red bold text the total number of notes written for that client and the total amount of time staff have spent working with that person.

On the Report Options page there is also a button labeled Contacts by Worker report that gives an abbreviated version of the report broken down by staff person.

Progress Notes Report

The Progress Note Report gives a breakdown of the number of progress notes left per client, per staff member or per date.

When you click the Progress Note Report button you will be asked whether you want to run the report for all the workers or just one, and all the clients or just one. You can run the report over any Date Range. And you can sort the report by Client, Worker, or Date. Click Run Report to run the report. The total number of notes and the total amount of time recorded working with clients is reported.

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.