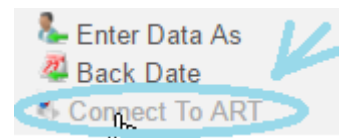


# Running the Case Management Report

HMIS tracks many key points of data, including the number of case management hours. Case management hours can be used in several ways. One can track how many hours a single client receives over the course of their stay within a program. You can see how many case management hours any given HMIS user has provided over a period of time. However, the most basic way the case management hours on HMIS are used is to determine how many hours a provider has over a period of time. The City of Lansing tracks this information for all of the HUD CoC funded projects. In order to view and track this information, you will need to run the “#2016 CM time by month” report.

## Finding the Report

This report is an ART report, so first you will need to go to the ART report page. You can click “Reports” on the left side of the page, and then choose “ART” near the bottom. You can click “Connect to ART” in the top right hand corner of the page as well.



You will then see a list of folders that contain various reports. Start by opening the “Public Folder” folder, and choosing “Provider Specific.” You will then need to choose “Lansing,” which may not be on the first page of folders. Click the “Next” button until Lansing is visible. After opening “Lansing,” open “Case-management Monitoring,” which is the first option. The “#2016 CM time by month - audit w/o names” is the second report option. Click on the magnifying glass to run the report.

Report Name	Last Modified	Icon
#2015 CM time by month - audit w/o names	2016-02-23 09:21	[Icon]
#2016 CM time by month - audit w/o names	2016-02-23 09:12	[Icon]
#Client Service Transaction List - by Case Manager	2015-09-29 08:30	[Icon]
#Client Service Transaction List - CM units audit	2015-02-24 12:26	[Icon]
#Client Service Transaction List - CM units audit w/o names	2016-03-15 13:52	[Icon]

## Running the Report

After viewing the report, you will need to answer four questions in order to bring back accurate data.

First, you need to select the provider whose case management information you seek under **both** the EDA Provider and the Service Provider. If you are going to run the report for multiple providers, leave the EDA Provider as "Default Provider" and choose as many Service Providers as needed. Then you need to choose the start and end dates for the period of case management you are examining.

## Reading the Report

After plugging in the needed information, the following report will come up:

Agency - Program	# Served	Total Services	CM Services	Total CM Time
Agency Name	72	217	195	183.95 Hour(s)
<b>Sum:</b>				<b>223.95 Service Units</b>

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Clients	41	43	49									
All Service Units	69.15	75.05	79.75									

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Clients	39	42	49									
CM Hours	60.15	54.05	77.25									

Service Type	# Served	Total Services	Total CM Time
Basic Needs	1	1	1.5 Hour(s)
Case/Care Management	64	143	161.45 Hour(s)
Case/Care Management	32	52	40 Missing Units
Education	6	21	31 Hour(s)
<b>Sum:</b>	<b>72</b>	<b>217</b>	<b>223.95 Service Units</b>

There are a few key data points on the report. First, in order to determine the number of case management hours a provider had, look at the table at the bottom of the first tab for the “Case/Care Management” for the line that has a number of hours. This shows the number of clients with case management, the number of case management services, and finally the total case management time. “Case/Care Management” services without a unit type are identified as “Missing Units”.

Service Type	# Served	Total Services	Total CM Time
Basic Needs	1	1	1.5 Hour(s)
Case/Care Management	42	68	69.95 Hour(s)
Case/Care Management	17	24	21.25 Missing Units
Education	6	16	24 Hour(s)
<b>Sum:</b>	<b>48</b>	<b>109</b>	<b>116.7 Service Unit</b>

The other important data points are the monthly tables. One table shows all services and units and the one below is limited to only “Case/Care Management” services.

	Jan	Feb	Mar
Clients	42	49	51
CM Hours	149	95.5	123.75

The other tabs provide client level detail that can be used to identify service records where the unit type was not selected or where the number of hours was not entered.

**Client ID Number**

Service Provide Start Date	Service Provide End Date	Service Code Description	Service Fund Source1	Total Cost	Service Units	Unit Type	Service User Creating
1/20/2016	1/20/2016	Case/Care Management		\$0.00	1.5	Hour(s)	User Name
2/16/2016	2/16/2016	Case/Care Management		\$0.00	0.25	Missing Units	User Name
2/10/2016	2/10/2016	Case/Care Management		\$0.00	0.25	Missing Units	User Name
1/28/2016	1/28/2016	Case/Care Management		\$0.00	1	Missing Units	User Name
2/9/2016	2/9/2016	Case/Care Management		\$0.00	1.5	Hour(s)	User Name
Sum:				<b>\$0.00</b>	<b>4.5</b>		

Alternatively, there is a version of the report that contains the client name that may be easier to use for corrections and data clean-up.

