

A Quick Guide to ServicePoint Reports

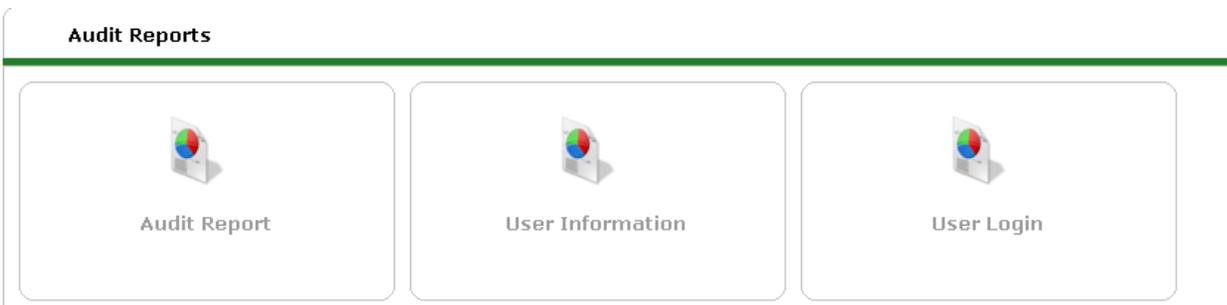
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To access the 'Reports' functionality in ServicePoint, log on at <https://www.servicept.ca/calgary/> and click on the 'Reports' tab/module on the left hand side of the screen.



The reporting screen has either two (case managers) or three main headings (Agency Administrators) depending on the level of access of the user: "Audit Reports" (Agency Administrators only), "Provider Reports", and "Custom Reports"

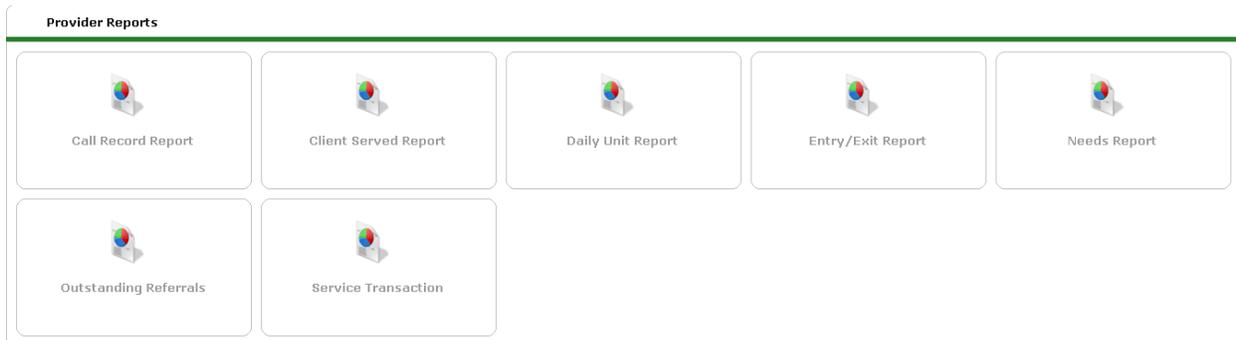
First let's take a look at the "Audit Reports" sub-heading:



- The **Audit Report** allows agency administrators to see all actions undertaken by agency staff using HMIS. It can also be filtered using the "Action" tab, depending on whether you want to see information that was created, read, updated, deleted, or inactivated and by whom.
- The **User Information** report allows agency administrators to see all activity that occurred on the accounts of their agency staff, and who the activity was conducted by. For example, you would be able to track if Case Manager X logged on and edited information -or maybe Agency Admin Y logged on and edited Case Manager X's account etc.

- Finally we have the **Users Login** report. This allows agency administrators to see which agency staff logged into ServicePoint, the date of the log-in, the IP address of the log-in, and whether the log-in attempt was successful or not. Using the “Login Result” tab, you can also choose to view either the “Successful” or “Failure” log-in attempts.

Next we’ll take a look at “Provider Reports”:



- Firstly, don’t worry about the **Call Record Report** - it’s not something you’ll ever have to use!
- The **Daily Unit Report** is only applicable to those actively using to track shelter stays/clients in housing. This report allows users to see who was checked into the shelter/housing unit, in what floor/section they were checked in, when they checked in, and if they checked out. Prior to building this report you must select the shelter provider (i.e. Mustard Seed Shelter) and the start/end dates which you would like to view. You can also choose to sort the unit stays based on gender, date checked in etc.
- The **Client Served Report** allows the agency staff to see the amount and breakdown of clients served by a program over a given time.
- The **Entry/Exit Report** enables users to see the number of clients who have entered/exited a particular program within a given date range. This report also generates sub-categories based on the UDEs (i.e. age, gender, ethnicity) to allow agencies to see the demography of the clients they have served over a given time period.
- The **Needs Report** allows users to select a program and a need provided to a client (i.e. food, clothing etc.) to determine the demography of clients who identified this need and worked with staff to receive this need within a specified time period.
- The **Outstanding Referrals** report allows users to select a program and see either the number of referrals the provider has made or the cases referred to this program over a given time range.
- The **Service Transaction** report allows users to select a program (or a program and its subordinates) and either look at services, needs, referrals (or two, or all three) to see which were referred to the agency and which were referred to other agencies over a given time period.

Finally, we'll take a look at "Custom Reports":

- The **ART** Report allows certain users to run pre-packaged reports on HS Assessments Data (see Separate 'ART Report Guidelines' for more specific instructions). Users must have an ART license to access these reports.
- The **Report Writer** allows you create simple, customized reports with the data your staff has been entering into the system (i.e. client demographics, UDE's, Case plans, Goals, Assessments, etc.). You can designate specific fields and even add filters to produce the exact results you need.