

# PULSE Report AWARDS INSTRUCTION SHEET

In order to complete the PULSE Report using AWARDS data, agencies must run pre-set report templates in the HMIS ReportBuilder in the Profile module. These templates are preset to include the necessary data and no modifications need to be made to the templates in order to retrieve PULSE requirements. In most cases, they are also filtered to include only Emergency Shelter and Transitional Housing programs.

For general information on using the HMIS ReportBuilder, refer to the "HMIS ReportBuilder Instruction Sheet" in Online Help.

The following new fields have been added as options in the HMIS ReportBuilder for the purposes of the PULSE reporting needs.

- **HUD Program Type** This field is entered for programs in the System Setup module Agency Program Information feature.
- Newly Homeless This report field will display a "Yes" or "No" value based on HUD's definition of newly homeless (New clients are defined as people who: (a) entered an emergency shelter or transitional housing program during the quarter and (b) have not received any homeless residential services in the 15 months prior to the client's first program entry date during the quarter.) AWARDS looks for another program history for the client within the 15 months prior to the intake/admission date in either a Transitional Housing, Emergency Shelter or Safe Haven program. If there is such a stay recorded for the client, Newly Homeless with be No. In addition, if their Residence Prior to Program Entry recorded for the stay is either 'Emergency Shelter voucher' or 'Transitional housing for homeless persons (including homeless youth)' or 'Safe Haven', Newly Homeless will be No in that case as well.
- Household Type This report field will display either "Household No Children," "Household Children Only" or "Household Adults and Children" and uses household data entered on the client's household information form.
- Unaccompanied This report field will display a "Yes" or "No" value based on whether the client is accompanied by other household members. If they
  are accompanied, this value will be "No."
- Person Type (PULSE) This report field will display either "Adult" or "Child" based on the client's age at admission calculated by their date of birth and admission date. If Birth Date Data Quality is not Full DOB Reported then this will consider them "Don't Know/Refused." (Note that there is also a "Person Type" field that appears on the HMIS ReportBuilder that is based on a client's current age.)

In addition, if the "Unduplicated Consumer Count" option is selected when running the report, new "Earliest" and "Latest" radio buttons appear allowing users to designate whether the earliest or latest program records should be reported on for clients are being unduplicated. By default, the latest data will be used unless specified otherwise, as will be the case in the saved report formats described below.

Permissions required to run an HMIS ReportBuilder report are as follows:

- CHART ACCESS You must have chart access permission to the program(s) for which the report is being run.
- DATA ENTRY / ACCESS You must have the "Display Any Chart Records Buttons," and "Display Chart Records Profile Button" data entry/access
  permissions in order to access the Profile module in which the HMIS ReportBuilder feature is located.

### ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the HMIS ReportBuilder to complete reports needed to complete the PULSE Report. Specific topics covered are:

•	Entering or Updating Data in Tab C – Learn how to enter or update data in Tab C of the Pulse Report.	Page <b>2</b>

- Entering or Updating Data in Tab D Learn how to enter or update data in Tab D of the Pulse Report.
   Page 6
- Entering or Updating Data in Tabs E, F and G Learn to enter or update data in Tabs E, F and G of the Pulse Report.
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### ENTERING OR UPDATING DATA IN TAB C

This procedure will guide you through retrieving the data needed to complete Tab C – All Clients on the PULSE Report, as well as depict where to enter the correct data on the HUD website.

To enter or update data in Tab C, complete the following steps:

- 1. From the AWARDS Opening Menu page, click **Profile**. The Consumer/Program Profile menu page is displayed.
- 2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.
- 3. Click HMIS ReportBuilder. The Report Settings page is displayed.

This page contains date range selections, as well as a list of any saved report formats to which you have access.

4. Click the Roster Date Range drop-down arrow and select "In Program."

- 5. By default, the report only looks for clients with program histories for today's date. In the **From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format). For the purposes of the PULSE Report, the same date should be entered in the **From** and **To** fields, and that date should be the last Wednesday of the quarter being reported on.
- 6. Click the Select a saved report format: drop-down arrow and select "PULSE Report Tab C."
- 7. Click **CONTINUE**. The HMIS ReportBuilder report is generated and displayed.
- 8. To print the report (if needed) click File on the Internet browser's menu bar and select Print. Adjust the printer settings as necessary, and then click Print.
- 9. Locate the distinct counts in the individual detail table and pull the following data into the PULSE Report. Read down the table from top to bottom. The "Distinct" counts that appear in the Household ID column will provide the data needed for the "Number of Households" fields. Enter the numbers for Emergency Shelter and Transitional Housing for the appropriate Household Type as shown in this depiction.

The HMIS ReportBuilder only displays data sets in a summary table if corresponding data exists in the report. If your summary tables are missing any of these data sets, it means that the program or program group selected does not contain data of that type during the reporting date range, and you should enter zeros in the corresponding fields on the PULSE Report.



10. Locate the summary tables at the bottom of the report and pull the following data into the PULSE Report:

If you see that your Household Type column reports a "No Data" value, this indicates a possible data-entry error and data should be evaluated to ensure all required fields at admission were completed and all clients are being counted. (See the following screen shots for an example of this.)

The HMIS ReportBuilder only displays data sets in a summary table if corresponding data exists in the report. If your summary tables are missing any of these data sets, it means that the program or program group selected does not contain data of that type during the reporting date range, and you should enter zeros in the corresponding fields on the PULSE Report.

For example, if your "Person Type (PULSE)" summary table does not contain a column for "Don't Know/Refused" then you should enter 0 in the "Missing this Information" PULSE fields.

If your Gender summary table contains columns for Transgendered Male or Transgendered Female, those values should be added to the Male and Female values respectively, and the sum should be reported.



## ENTERING OR UPDATING DATA IN TAB D

This procedure will guide you through retrieving the data needed to complete Tab D – New Clients on the PULSE Report, as well as depict where to enter the correct data on the HUD website.

To enter or update data in Tab D, complete the following steps:

- 1. From the AWARDS Opening Menu page, click **Profile**. The Consumer/Program Profile menu page is displayed.
- 2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.
- 3. Click HMIS ReportBuilder. The Report Settings page is displayed.

This page contains date range selections, as well as a list of any saved report formats to which you have access.

- 4. Click the **Roster Date Range** drop-down arrow and select "In Program."
- 5. By default, the report only looks for clients with program histories for today's date. In the **From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format). For the purposes of the PULSE Report, the dates for the quarter being reported on should be entered in the **From** and **To** fields (ex, 04/01/2011 06/30/2011).
- 6. Click the Select a saved report format: drop-down arrow and select "PULSE Report Tab D."
- 7. Click **CONTINUE**. The HMIS ReportBuilder report is generated and displayed.
- 8. To print the report (if needed) click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.
- 9. Locate the distinct counts in the individual detail table and pull the following data into the PULSE Report. Read down the table from top to bottom. The "Distinct" counts that appear in the Household ID column will provide the data needed for the "Number of Households" fields. Enter the numbers for Emergency Shelter and Transitional Housing for the appropriate Household Type as shown in the depiction on page 3.

The HMIS ReportBuilder only displays data sets in a summary table if corresponding data exists in the report. If your summary tables are missing any of these data sets, it means that the program or program group selected does not contain data of that type during the reporting date range, and you should enter zeros in the corresponding fields on the PULSE Report.

10. Locate the summary tables at the bottom of the report and pull the following data into the PULSE Report:

This set of summary tables is not set to filter in only Emergency Shelter or Transitional Housing data only. If other program types appear in your summary tables, disregard those and only use the Emergency Shelter and Transitional Housing data.

If you see that your Household Type column reports a "No Data" value, this indicates a possible data-entry error and data should be evaluated to ensure all required fields at admission were completed and all clients are being counted. (See the following screen shots for an example of this.)

The HMIS ReportBuilder only displays data sets in a summary table if corresponding data exists in the report. If your summary tables are missing any of these data sets, it means that the program or program group selected does not contain data of that type during the reporting date range, and you should enter zeros in the corresponding fields on the PULSE Report.

For example, if your "Person Type (PULSE)" summary table does not contain a column for "Don't Know/Refused" then you should enter 0 in the "Missing this Information" PULSE fields.

If your Gender summary table contains columns for Transgendered Male or Transgendered Female, those values should be added to the Male and Female values respectively, and the sum should be reported.



### ENTERING OR UPDATING DATA IN TABS E, F AND G

This procedure will guide you through retrieving the data needed to complete Tab E – Status, Tab F – Prior Arrangement and Tab G - Stability on the PULSE Report, as well as depict where to enter the correct data on the HUD website.

To enter or update data in Tabs E, F and G, complete the following steps:

- 1. From the AWARDS Opening Menu page, click **Profile**. The Consumer/Program Profile menu page is displayed.
- 2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.
- 3. Click HMIS ReportBuilder. The Report Settings page is displayed.

This page contains date range selections, as well as a list of any saved report formats to which you have access.

- 4. Click the Roster Date Range drop-down arrow and select "In Program."
- 5. By default, the report only looks for clients with program histories for today's date. In the **From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format). For the purposes of the PULSE Report, the dates for the quarter being reported on should be entered in the **From** and **To** fields (ex, 04/01/2011 06/30/2011).
- 6. Click the Select a saved report format: drop-down arrow and select "PULSE Report Tabs E, F, G."
- 7. Click CONTINUE. The HMIS ReportBuilder report is generated and displayed.
- 8. To print the report (if needed) click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.
- 9. Locate the summary tables and pull the following data into the PULSE Report:



CARINALITY B. HITS COVERAGE TC. AILCHERS D. New Clients E. Status TF. Prior Arrangement G. S

E. Quarterly Count of New Clients by Veteran and Disability Status<sup>a</sup>

			VETERAN?			TOTAL
HOUSEHOLD TYPE	HOD PROGRAM TYPE	-No Data-	Don't Know	No	yes	TUTAL
Household Adults and Children	Emergency Shelter	0	0	109	1	110
	Transitional Housing	1	1	94	0	96
	TOTAL	1	1	203	1	206
Household No Children	Emergency Shelter	0	16	478	23	517
	Transitional Housing	0	0	91	5	96
	TOTAL	0	16	569	28	613
TOTAL		1	17	772	29	819

For the data required in the "Missing this Information" fields, add the corresponding "No Data" and "Don't Know" values that appear on the summary table.



					D	ISABLING COND	ITION			
HOUSEHOLD TYPE	HUD PROGRAM TYPE	Don't know	No	Yes	Yes - Chronic physical illness or disability	Yes - Developmental disability	Yes - Diagnosable substance use disorder	Yes - Dually diagnosed	Yes - Serious mental illness	<u>TOTAL</u>
Household Adults and Children	Emergency Shelter	0	107	2	0	0	0	0	1	110
	<b>Transitional Housing</b>	2	89	0	1	1	2	1	0	96
	TOTAL	2	196	2	1	1	2	1	1	206
Household No Children	Emergency Shelter	13	398	60	9	3	23	3	8	517
	<b>Transitional Housing</b>	3	60	4	4	3	8	3	11	96
	TOTAL	16	458	64	13	6	31	6	19	613
TOTAL		18	654	66	14	7	33	7	20	819

For the data required in the "Disabled" fields, add the corresponding "Yes" value to any other "Yes – [detail]" values that appear on the summary table.

The process of entering/updating data in Tab E is complete.



											RESI	DENCE PRIOR	R TO PROGRAM E	NTRY								
	HOUSEHOLD TYPE	HUD PROGRAM TYPE	-No Data-	Don't Know	Foster care home or foster care group home	Hospital (non-psychiatric)	Hotel or motel paid for without emergency shelter voucher	Jail, prison or juvenile detention facility	Other	Owned by client, no ongoing housing subsidy	Owned by client, with ongoing housing subsidy	Permanent supportive housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train /subway station/airport or anywhere outside)	Psychiatric hospital or other psychiatric facility	Refused	Rental by client, no ongoing housing subsidy	Rental by client, with VASH housing subsidy	Rental by client, with other (non-VASH) ongoing housing subsidy	Staying or living in a family member's room, apartment, or house	Staying or living in a friend's room, apartment, or house	Substance abuse treatment facility or detox center	<u>TOTAL</u>
Γl	Household Adults and Children	Emergency Shelter	0	1	0	0	0	0	2	0	0	0	0	0	0	64	1	6	22	13	0	109
		Transitional Housing	1	4	0	0	0	0	1	3	0	1	2	0	0	10	0	7	55	10	1	95
		TOTAL	1	5	0	0	0	0	3	3	0	1	2	0	0	74	1	13	77	23	1	204
$\lceil \rceil$	Household No Children	Emergency Shelter	0	10	1	1	6	69	58	7	3	2	14	3	1	63	5	6	150	96	22	517
		Transitional Housing	0	2	0	2	0	29	4	2	0	0	2	0	0	4	1	2	30	11	7	96
		TOTAL	0	12	1	3	6	98	62	9	3	2	16	3	1	67	6	8	180	107	29	613
	TOTAL		1	17	1	3	6	98	65	12	3	3	18	3	1	141	7	21	257	130	30	817

ſ	A. Annual PIT   B. HMIS Coverage (C. All Clerits   D. New Clerits   E. Status   Perior Arrangement (G. Stability)	
	F. Quarterly Count of New Clients by Living Arrangement Prior to Program Intry <sup>a</sup>	

Living Arrangement	Adults in withou	Households t Children	Adults in with C	Households Children	Total
	Emergency	Transitional	Emergency	Transitional	
Emergency Shelter					0
Transitional Housing					0
Permanent Supportive Housing					0
Psychiatric Facility					0
Substance Abuse Treatment Center or Detox					0
Hospital (non-psychiatric)					0
Jail, Prison, or Juvenile Detention					0
Rented Housing Unit					0
Owned Housing Unit					0
Staying with Family					0
Staying with Friends					0
Hotel or Motel (no voucher)					0
Foster Care Home					0
Place Not Meant for Human Habitation					0
Other Living Arrangement					0
Missing this Information					0
Total Persons	0	0	0	0	0
Total ES Persons	0				
Total TH Persons	0				
	0				

Use this chart when entering values from the summary table to the report. An asterisk (\*) indicates multiple values on the summary table, and those values should be added together to arrive at the PULSE data for the report field.

PULSE Report Field:	Summary Table Values to Use:
Emergency Shelter	Emergency Shelter
Transitional Housing*	Transitional Housing for Homeless
	Safe Haven
Permanent Supportive Housing	Permanent Housing for formerly homeless (such as SHP, S+C, or SRO Med Rehab)
Psychiatric Facility	Psychiatric Hospital or other psychiatric facility
Substance Abuse Treatment Center or Detox	Substance Abuse Treatment Center or Detox Center
Hospital (non-psychiatric)	Hospital (non-psychiatric)
Jail, Prison, or Juvenile Detention	Jail, Prison or Juvenile Detention Facility
Rented Housing Unit*	Rental by client, with VASH Housing Subsidy
	Rental by client, with other (non-VASH) housing subsidy
	Rental by client, no ongoing housing subsidy
Owned Housing Unit*	Owned by client, with ongoing housing subsidy
	Owned by client, no ongoing housing subsidy
Staying with Family	Staying or living in a family member's room, apartment or
	house
Staying with Friends	Staying or living in a friend's room, apartment or house
Hotel or Motel (no voucher)	Hotel or motel paid for without emergency shelter voucher
Foster Care Home	Foster care home or foster care group home
Place Not Meant for Human Habitation	Place not meant for habitation
Other Living Arrangement	Other
Missing this Information*	Don't Know
	Refused

				LENGTH	OF STAY AT PRE	VIOUS RESI	DENCE								
HOUSEHOLD TYPE	HUD PROGRAM TYPE	-No Data-	Don't Know	More than one week, but less than one month	More than three months, but less than one year	One to three months	One week or less	One year or longer	Refused	<u>тота</u>	L				
lousehold Adults and Children	Emergency Shelter	0	5	2	13	7	1	81	0	10	ן פו	_			
	Transitional Housing	1	14	3	15	11	3	49	0	9	<mark>)6</mark>				
	TOTAL	1	19	5	28	18	4	130	0	20	5				
ousehold No Children	Emergency Shelter	0	31	37	128	67	26	227	2	51	1 <b>8</b>	.\			
	<b>Transitional Housing</b>	0	7	2	21	7	4	55	0	9	<b>16</b>	$  \rangle$			
	TOTAL	0	38	39	149	74	30	282	2	61	4				
DTAL		1	57	44	177	92	34	412	2	81	9				
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The process of entering/updating data in Tab G is complete.