The Program Profile Report

AWARDS INSTRUCTION SHEET

The Program Profile Report feature, located in the AWARDS Profile module, is used to view current and historical roster information for a selected program or program type.

REQUIRED PERMISSIONS

The Program Profile Report feature is available for use by users with the following permissions:

- Chart Access – You must have permission to the program(s) for which a report is to be viewed.
- Data Entry / Access – You must have the "Display Chart Records Profile Button" and the "Display Any Chart Records Button" permissions in order to access the Profile module in which the report is located.

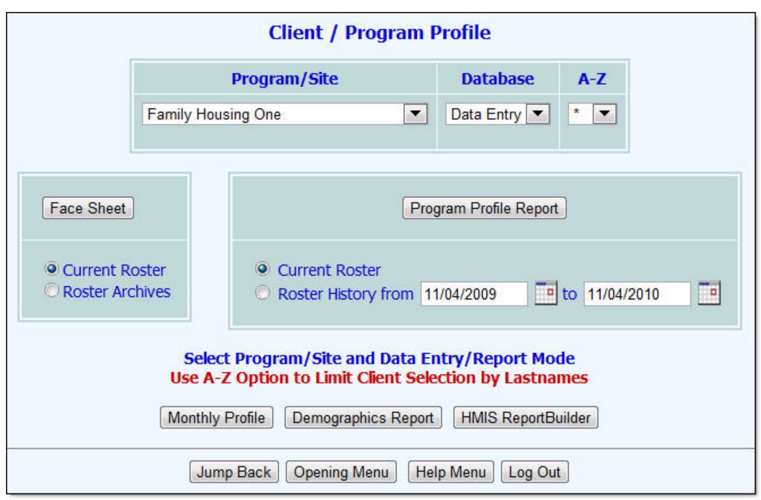
ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the Program Profile Report functionality to complete common report viewing tasks. Specific topics covered are:

VIEWING A CURRENT ROSTER REPORT

To view a report of current roster information for a selected program or program type, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Profile**. The *Client/Program Profile* page is displayed.



2. Click the **Program/Site** drop-down arrow and select the program or program type for which the report is to be viewed.
3. To limit report selection by client name, click the **A-Z** drop-down arrow and select the client's last name initial. An asterisk (*) in this field will include all clients in the report selection process.
4. Click the **Current Roster** radio button to indicate that only those clients currently on the roster of the selected program or program type are to be included in the report.

To instead view a report of clients on the roster of the selected program over a specified period of time, follow the instructions found under "Viewing a Roster History Report" on page 3.

5. Click **Program Profile Report**. The *Roster Profile Settings* page is displayed.

   *Clicking the **Report Information Link** on this page provides direct access to this instruction sheet.*

6. To view the roster profile information for a specific client, click the **Client** drop-down arrow and select that client. Otherwise leave this option at its default value – "All Clients."

   A client selection must be made if an initial was selected using the A-Z option on the Client/Program Profile Menu page. If no initial was selected, the Client selection is optional.

7. If a specific client was not selected (in step 6), click the **Sort** drop-down arrow and make a selection to indicate how the roster information is to be displayed in the report. Available selections are:

   - **Client –** When this option is selected, report information is sorted alphabetically by client name.
   - **Admission Date –** When this option is selected, report information is sorted chronologically by admission date, with the most recent admissions listed last.
   - **Program –** When this option is selected, report information is sorted alphabetically by program name.

     This option is only available if a program type and not a specific program was selected in step 2.

8. Click the **Detail** drop-down arrow and make a selection to indicate the level of detail to be included in the report. Available selections are:

   - **Show Individual Detail –** When this option is selected, the report includes detail on individual clients.
   - **Summary Tables Only –** When this option is selected, only summary demographics information tables (and no client names) are included in the report.

9. Click **CONTINUE**. The Program Profile Report is displayed on the *Roster Profile* page.

   The contents of this read-only report are based on the selections made on the previous pages and may include a combination of three data sections:

   - **Individual client detail –** Displayed if the report has been set to show individual detail. Includes client name, admission date, LOS (length of stay) days, birthdate, age, gender, and race/ethnicity data. A combination of one or more of the following variables may also be included in the individual client detail if set up behind-the-scenes to do so: client social security number (SSN), income at admission, zip code, and employer.
   - **Totals and averages information –** Displayed regardless of which detail setting has been chosen for the report. Includes the total census and average and median LOS calculated from admission through the report date.

- **Summary demographics data –** Displayed regardless of which detail setting has been chosen for the report. Includes count and percentage information for gender, age, race, ethnicity, and income at admission (if set up behind-the-scenes to include it).

Click the heading of any report column to sort the report contents by that variable. To limit which columns are displayed, click the column display icon in the upper left-hand corner of the report and pick and choose which columns of information should be included.

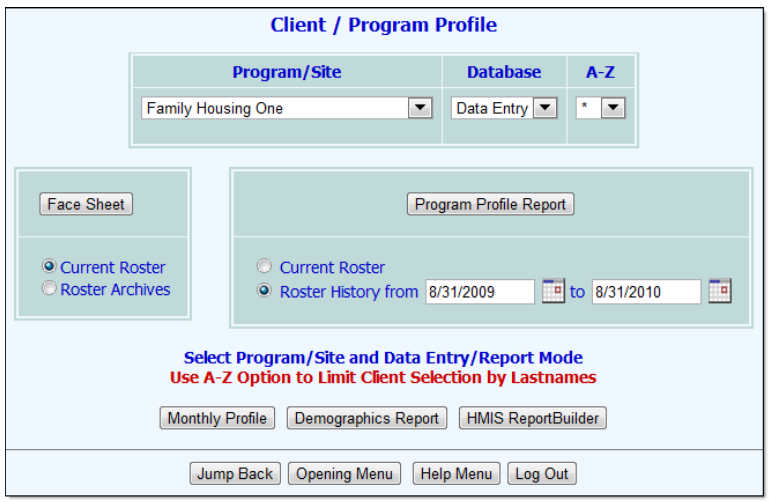
To export the report information to Microsoft Excel for further review and analysis, click the **Excel File** link at the top of the page and follow the download instructions on the screen. Once exported to Excel, this information can be saved and worked with as needed.

The process of viewing a current roster Program Profile Report is now complete.

VIEWING A ROSTER HISTORY REPORT

To view a report of clients on the roster of a program or program type over a specified period of time, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Profile**. The *Client/Program Profile* page is displayed.



2. Click the **Program/Site** drop-down arrow and select the program or program type for which the report is to be viewed.

3. To limit report selection by client name, click the **A-Z** drop-down arrow and select the client's last name initial. An asterisk (*) in this field will include all clients in the report selection process.

4. Click the **Roster History** radio button to indicate that only those clients who were on the roster of the selected program or program type during a specific period of time are to be included in the report; this can include clients who have since been discharged.

   To instead view a report of clients currently on the roster of the selected program, follow the instructions found under "Viewing a Current Roster Report" on page 1.

5. In the **from** and **to** fields, type the date range for which the report is to be viewed (using mm/dd/yyyy format). The default value is the past year.

6. Click **Program Profile Report**. The *Roster Profile Settings* page is displayed.

   *Clicking the **Report Information Link** on this page provides direct access* *to this instruction sheet.*

7. To view the roster profile information for a specific client, click the **Client** drop-down arrow and select that client. Otherwise leave this option at its default value – "All Clients."

   A client selection must be made if an initial was selected using the A-Z option on the Client/Program Profile Menu page. If no initial was selected, the Client selection is optional.

8. If a specific client was not selected (in step 6), click the **Sort** drop-down arrow and make a selection to indicate how the roster information is to be displayed in the report. Available selections are:

   - **Client –** When this option is selected, report information is sorted alphabetically by client name.
   - **Admission Date –** When this option is selected, report information is sorted chronologically by admission date, with the most recent admissions listed last.
   - **Discharge Date –** When this option is selected, report information is sorted chronologically by discharge date, with the most recent discharges listed last.
   - **Program –** When this option is selected, report information is sorted alphabetically by program name.

     This option is only available if a program type and not a specific program was selected in step 2.

9. Click the **Status** drop-down arrow and make a selection to further narrow report contents. Available selections are:

   - **Complete History –** When this option is selected, all clients are included in the report regardless of their status. This option must be selected if a specific client was selected in step 7.
   - **Program Discharges –** When this option is selected, only clients discharged during the report period are included in the report.
   - **Program Admissions –** When this option is selected, only clients admitted during the report period are included in the report.
   - **Census Changes –** When this option is selected, only clients whose status has changed during the report period are included in the report.

   The Status selection option is only available when a range of dates was specified in step 5. If a single date was entered in both the from and to fields, Status is not available.

10. Click the **Detail** drop-down arrow and make a selection to indicate the level of detail to be included in the report. Available selections are:

    - **Show Individual Detail –** When this option is selected, the report includes detail on individual clients.
    - **Summary Tables Only –** When this option is selected, only summary demographics information tables (and no client names) are included in the report.

11. Click **CONTINUE**. The Program Profile Report is displayed on the *Roster Profile* page.

    The contents of this read-only report are based on the selections made on the previous pages and may include a combination of three data sections:

- **Individual client detail –** Displayed if the report has been set to show individual detail. Includes client name, admission date, discharge date (if applicable), LOS (length of stay) days, birthdate, age, gender, and race/ethnicity data. A combination of one or more of the following variables may also be included in the individual client detail if set up behind-the-scenes to do so: client social security number (SSN), income at admission, zip code, and employer.

  When reviewing the LOS days information in this portion of the report, please keep in mind the following:

  - *When the report was run for a range of dates (as opposed to a single date), there are two LOS days values for each individual – one in brackets [ ] and one without. The LOS not in brackets is the total length of stay from the client's admission date through the report end date. The LOS in brackets is the length of stay during the report date range only.*

- **Totals and averages information –** Displayed regardless of which detail setting has been chosen for the report. Includes the total census, average and median LOS calculated from admission through the report end date, and average length of stay for the report date range (in brackets [ ]) when the report was run for a range of dates as opposed to a single date.

- **Summary demographics data –** Displayed regardless of which detail setting has been chosen for the report. Includes count and percentage information for gender, age, race, ethnicity, and income at admission (if set up behind-the-scenes to include it).

Click the heading of any report column to sort the report contents by that variable. To limit which columns are displayed, click the column display icon in the upper left-hand corner of the report and pick and choose which columns of information should be included.

To export the report information to Microsoft Excel for further review and analysis, click the **Excel File** link at the top of the page and follow the download instructions on the screen. Once exported to Excel, this information can be saved and worked with as needed.

The process of viewing a roster history Program Profile Report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the Program Profile Report feature can be a useful reference when you have your own questions about the functionality.

HOW IS AGE CALCULATED?

Age is calculated as of the date on which the report was run, as opposed to the report date or the end date of the report if run for a range of dates.

HOW IS LENGTH OF STAY (LOS) DAYS COUNTED FOR NIGHTLY EMERGENCY SHELTER PROGRAMS?

For programs configured as Nightly Emergency Shelter program, the Program Profile report in the Profile module reports the number of nights a client spent in the program in the "LOS Days" column. (For all other programs and for groups of programs, the "LOS Days" column reports the number of days a client spent in the program.) Further, if the report is run for a single day (where the From and To dates are the same), the report includes only clients who were admitted into the program on that day.