

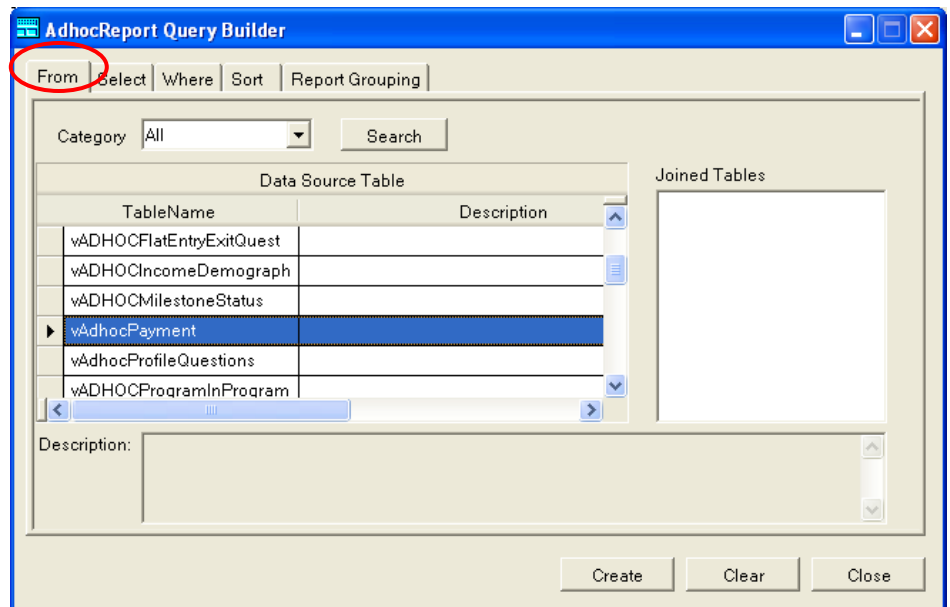
# HPRP Service Reports

## Building Ad Hoc Reports for HPRP

This Ad-Hoc report explanation assumes your agency has had your two Activities set up for HPRP vendor payments – “**HPRP Prevention**” and “**HPRP Rapid ReHousing**.” If your agency separates activities by county, these would be listed as “**HPRP County PREV**” and “**HPRP County RR**” or similar activity names. Also, you have submitted any HPRP records that were Paid in the MIS, and had “HPRP Vendor Payment” as an Activity, to Adsystem to be changed to the appropriate new Activity. With those tasks done, the following Ad-Hoc report will pull all the data you need for any HPRP reporting without extra work on the data.

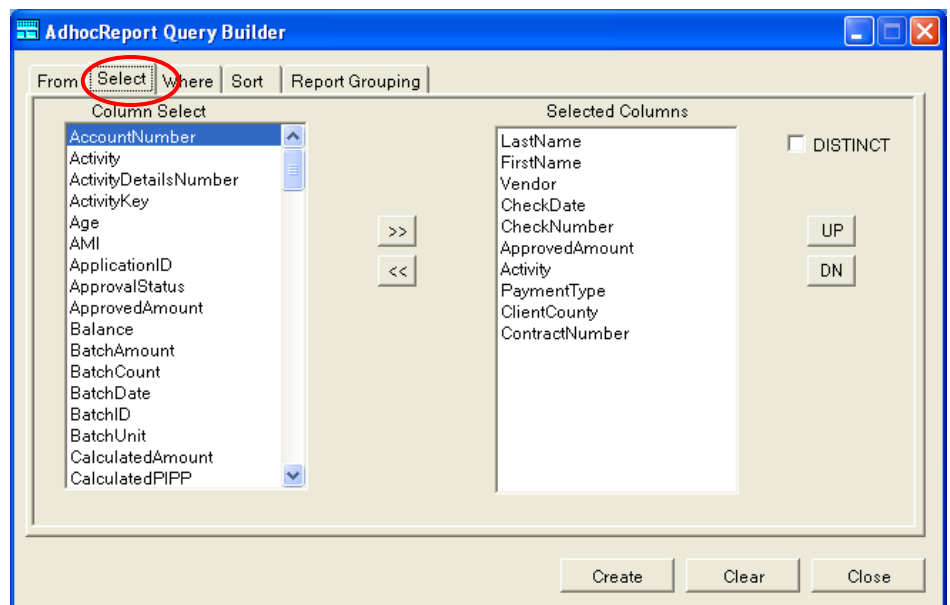
There is flexibility in the report based on the purpose you are pursuing. You may want to include any conceivable data elements in one report, or have one report specifically for reporting needs, and another for management purposes. For the basic reporting requirements, follow these simple steps.

1. Click on “**Report**” on the menu bar, and then “**Ad-hoc Reports**” to bring up the Ad Hoc reporting tool. Click on the “**Build New Query**” button. This will bring up the **Query Builder**, with the “**From**” tab displayed, (example on right.) From the list under “**Table Name**” select “**vAdhocPayment.**” This table can provide all the information associated with making payments in the MIS.



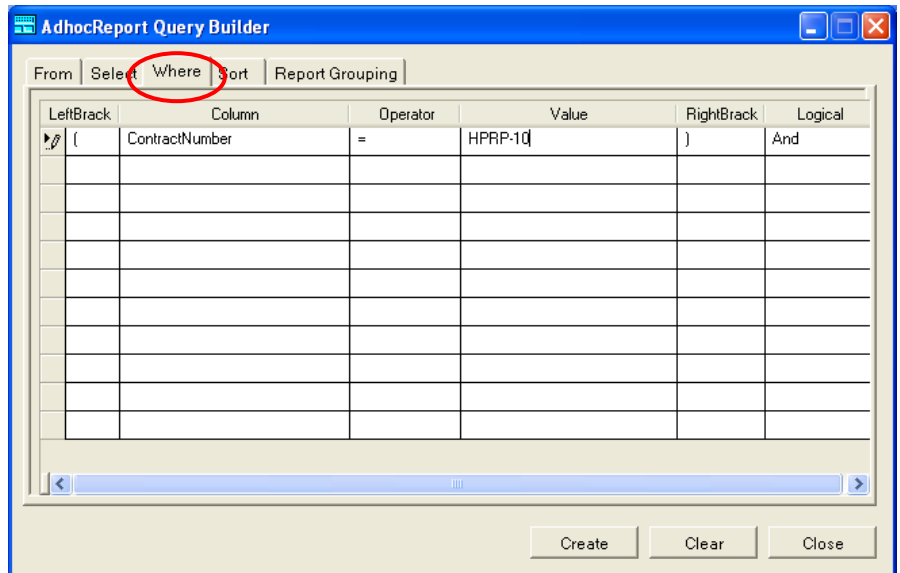
Then click on the “**Select**” tab.

2. In the “**Column Select**” field, select the data items you want, and move them to the right using the >> button. You can then move them into the order you would like by selecting an item and clicking **UP** or **DN**. (This is the order of data columns on the report.) The selections to the right were the ones useful for our request.



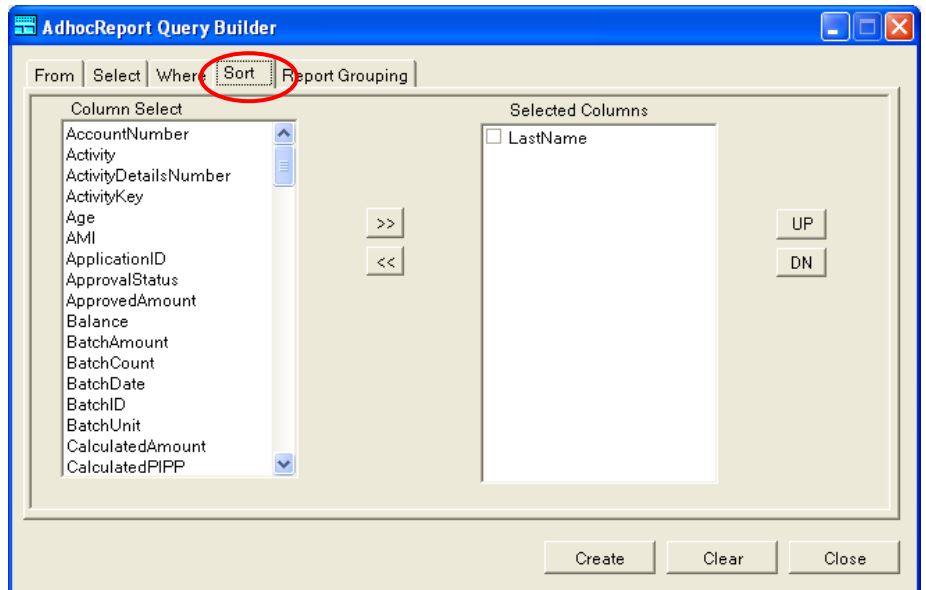
Then click on the “**Where**” tab.

- Set the “**Left Bracket.**” Under “**Column**” select “**ContractNumber**” from the drop-down list. In the “**Operator**” column choose “**=**.” In the “**Value**” column type the exact name of the contract you want. If you have more than one contract you should create a separate report for each for reporting. . If you want all contract data in one report, and the all begin with HPRP then “**HPRP%**” for the “**Value**” will include the data from all HPRP contracts. And you can sort the data to separate them. It’s your choice. Close the “**Right Bracket.**”



Then click on the “**Sort**” tab.

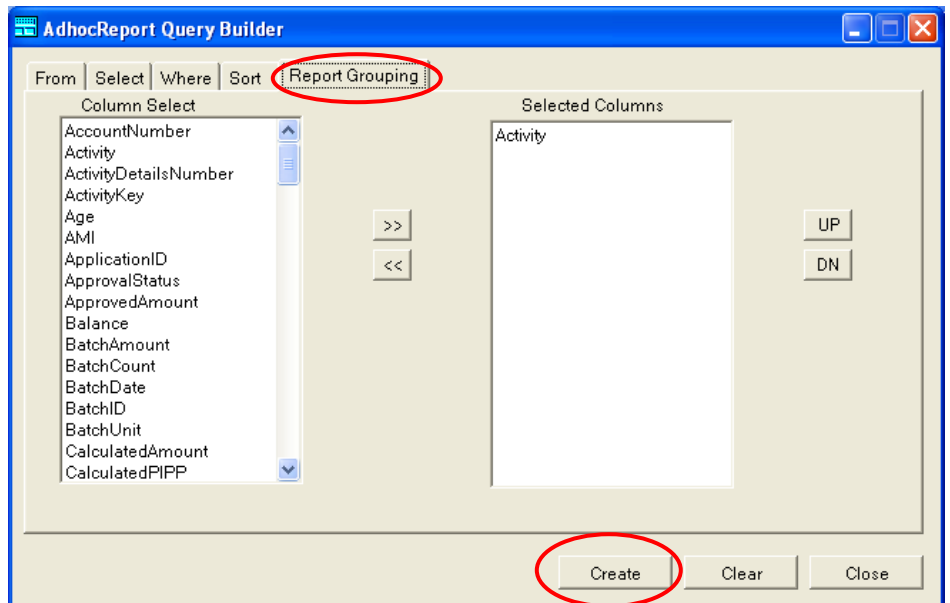
- In the “**Column Select**” field choose “**LastName**” to get the resulting table sorted by client last name, and move it right to the “**Selected Columns**” field.



Then click on the “**Report Grouping**” tab.

- In the “**Column Select**” field choose “**Activity**” and move it over to “**Selected Columns.**” This ensures that the report will have two sections, one for each Activity. (If you add “**Client County**” each Activity section will have a labeled section for each County as well.)

Then click “**Create**” at the bottom to make all the selections ready to use. The “**Query Builder**” will close.



6. You complete the report preparation back on the Ad hoc Reports window. (See below) I chose “**Services**” for the “**Category**” field. In the “**Title**” field I put “**HPRP Service Report.**” In the “**Date Field**” I chose “**CheckDate**” from the drop-down list. This matches one of the columns selected for the report, and will limit data to payments that have been reconciled – i.e., they have a check date in the MIS. In the “**Start Date**” and “**End Date**” fields, select the date range for the period you want the report to cover. The example below is for everything through February.
7. Then click on the “**Export as Excel**” tab at the bottom. You will wind up with a report with all the data in Excel, but in a web page format without the Excel tools. If the data looks like what you wanted, save it to a handy folder on your computer, and close it. When you open it you will have the Excel tools available.

8. Back on the “**Ad hoc Reports**” window click on “**Save As.**” This will bring up a window where you can confirm, or change your choices for Category and Title, and lets you add a description of what this report is for. Then Click “**OK.**”

9. Having saved your new report, the next time you need the report it will be available on the Ad-hoc Reports window by selecting the “**Category**” you saved it under, and then selecting the name you gave it in the “**Report Query**” drop-down list. Click “**Load**” and it will load the report as you saved it. If the data you got before was what you wanted, no editing is needed. Just set the range in the **Start** and **End** date fields for the period you want, and click “**Export to Excel**” to get your new report.

### Using the Report

In order to sort the data on the Excel report you will need to un-merge the **last name column** which is comprised of three columns for some reason.

As presented in this Ad-Hoc set up you will get a report that has client records with an “**Activity**” of “**Prevention**” labeled, and listed together alphabetically by last name, followed by the group of client records with an “**Activity**” of “**Rapid Re-Housing**.” You can add amounts paid in each Activity. You can do additional sorting by County or by Payment Type.

A report with some of this information can be gotten from your HMIS database, but Vendor, check number, and check date will not be there. In the MIS the choices under “**Payment Type**” on the **Vendor and Payment** page were designed when payments for most of our **Emergency Services** contracts were limited to a single month. So if paying rent there is a choice of “**Rent – First Month**,” “**Rent – Deposit**,” and “**Rent – 1 month to prevent eviction**.” With “**HPRP Prevention**” we could be paying several past due months to prevent eviction. So regardless of the number of months being paid the “**Rent – 1 month to prevent eviction**” choice should be made, so long as payment results in their staying in their home.

For clients fitting the “**Rapid Re-Housing**” category, their rent “**Payment Type**” on the Vendor page will be for “**Rent – first month**,” and/or “**Rent – Deposit**,” and they may also have other deposit payments. *(Note: if subsequent rent payments are made for Rapid-Re-Housing clients, the choice may be “**Rent – 1 month to prevent eviction**” but the client remains in the “**Rapid Re-Housing**” category as long as they are an active HPRP client. This is according to a HUD FAQ on their website.)*

In order to be able to sort and report rent deposit payments separately from rent payments they must be entered as separate records, even if being done at the same day for the same vendor. Then the “**Payment Type**” will be specific for the kind of payment being made.

Comparing this report with the HMIS Details report is a good check on data validity for both systems. But be aware that the HMIS report may not completely agree in the total spent. It may report a payment because the date provided is in your date range, but the check date in the MIS is in the following month so it wasn't paid in your date range. In this Ad-hoc report you're after paid information.

**(Excel Pointer:** In the Excel report the “**CheckDate**” field will show just #####. In Excel-ese this means the data is too long to display in the column. If you widen the column you'll see it has imagined a time of day after the date. It isn't real and you don't care anyway. Highlight the entire “**CheckDate**” column, right-click, and choose “**Format Cells**.” In the “**Number**” tab choose “**Date**” from their list. On the right there are many choices for how to display a date. Choose a short one like “**03/14/01**” and click “**OK**.” Then all the dates will display in that format.)

**(HAVING TROUBLE?** If you have trouble getting started with this, you may not have the needed report permissions set as a user. Consult one of your Agency Administrative team members for assistance.)

## An Ad Hoc Report for Managers of HPRP

By adding a few additional items from the “**Selection**” tab in the **Query Builder**, (Step 2 above), and saving the result with a **new report name**, you can create a report to help manage the whole HPRP project. The above report focuses on “**Paid**” records for reporting purposes. But what about “**Pending**” and “**Approved**” ones so you know not only where you’ve been but where your headed – and why not add knowing who is working on each client.

The same report as above can be turned into this tool by adding in **Step # 2** the following items:

- “**ApprovalStatus**”: - (Pending, Approved, Paid)
- “**DecisionDate**” – (Gives another date to sort by since only **Paid** ones have a check date. This date is the most recent decision – entry as Pending, or Approved date.)
- “**Resource**” – (The MIS term for the staff doing the work.)

When running this management report use “**Decision Date**” instead of Check Date in **Step # 6** on page 3, then the date range you want. You will get all **HPRP** records of any status, can figure how much is obligated, and know which staff initiated records as well as the county, the vendor, etc. – and up to the minute if you like. Way cool --- as these things go.