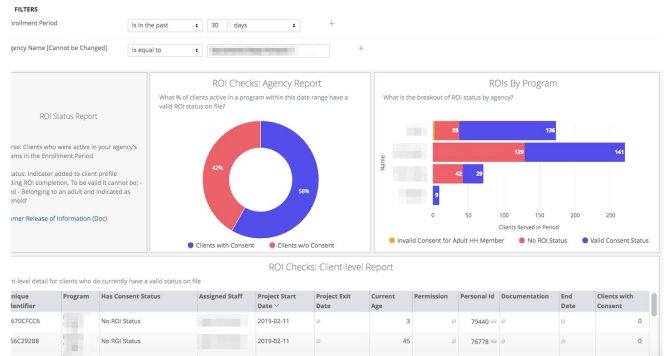


Guide To: Running ROI Reports

.....
.....



Objective:

Check in on how many clients served have a valid ROI status on file and monitor opportunities to verify permissions in HMIS. Any client you work with must have a valid ROI on file, regardless as to whether your agency created the profile or not.

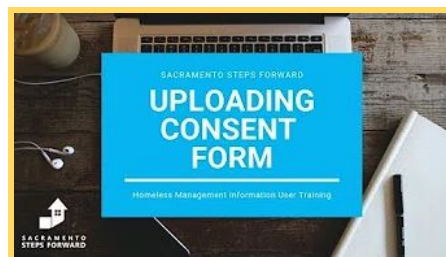
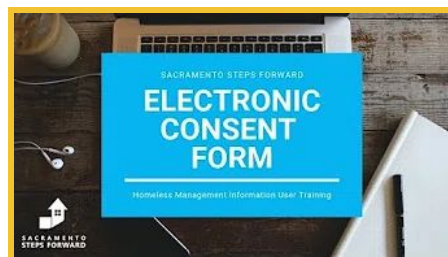
IMPORTANT NOTE: If you have access to multiple agencies in HMIS, this report will not currently work for you. Bitfocus is currently working on resolving this issue. If you do not currently have access and wish to, please email hmis@sacstepsforward.org and tell us A) for which programs you would like this report to be emailed to you; B) how frequently you wish to receive this report

What this report is looking for:

A “valid” ROI is one that:

- Has a status indicated in the client’s shield/Client Privacy section
- Is not expired
- Is not a “household” consent -- meant only for minors -- covering an adult (18+)

For a refresher on how to manage ROIs, please check out our training videos:



How to run the report:

→ Location:

Reports > Data Analysis > Sacramento County HMIS Reports > Release of Information Status

The screenshot shows the 'Sacramento Steps Forward' dashboard. At the top, there are navigation tabs: 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS' (highlighted with a red '3'). A sidebar menu on the right contains icons for 'SETUP', 'MANAGE', 'REPORTS' (highlighted with a red '2'), and 'CALENDAR'. Below the sidebar, the main content area is titled 'DATA ANALYSIS' and shows a section for 'Built In Reports'. Under this section, there is a link for 'Sacramento County HMIS Reports' (highlighted with a red '4') which shows '7 report(s)'. A table lists several reports, each with a 'RUN' button (highlighted with a red '5').

Report Name	Action
root	
CoC Hotlist Clients	○RUN
Minors Aging into Adulthood with Incomplete Screens - Exits	○RUN
Responsible Staff - Active Programs	○RUN
Document Ready/Certifications	○RUN
Active Staff	○RUN
Agency Level Data Quality Dashboard	○RUN
Release of Information Status	○RUN

→ How to Read this Report

This is a dashboard containing three reports.

Filters:

- **Enrollment Period:** Common to most HMIS reporting, filters to only clients who had at least one active day in one of your programs. Thus, even if they exited on the first day of the range or entered on the last day of the range, they'll show up here.
- **Agency Name:** This is a dummy filter; if you try to change it right now, it won't work. We installed it here in hopes that Bitfocus is going to update its features so people belonging to multiple agencies can navigate from here.

→ Actions to Take



The goal is to have 100% valid ROI statuses on file.

Resolve invalid cases by:







1. examining the cases in the “ROI Checks: Client-level Report”
2. updating the Client’s ROI section of the profile.

The two simplest ways to explore your data are the following:

1. Open up Cases Directly from the Report

On the bottom-most report, you will be linked to a client profile if you click on the three horizontal dots  next to ‘Personal Id’. Just click on the  icon:

Client-level detail for clients who do currently have a valid status on file

	Unique Identifier	Link to Client (click)	Current Age	Program
1	5C681E68A	48102 	9	Family Rescue Proj
2	8DAE096A3	57043 	LINKS	Rescue Proj
3	10B59699C	82167 	 Clarity Profile 	Sanctuary -
4	197FC7868	67874 	53	SSHH: Elk Grove O

2. Downloading the Data (best for redistribution)

You can download the results by hovering in the upper-right hand corner of the report to produce three vertical dots and select ‘Download Data’

