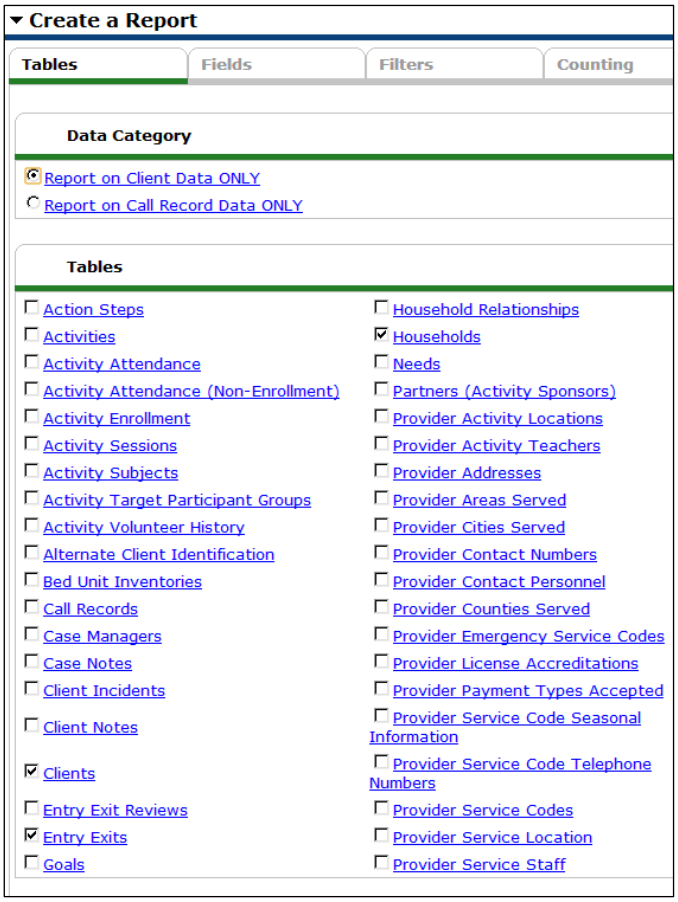
ReportWriter Basics

1) Go to Reports> ReportWriter.

2) Wait for the ReportWriter module to load (can take a few moments).

3) Click "New Report". The "Create Report" window will pop open. You will be on the "tables" tab.

4) Select the tables, assessment(s) and/or sub-assessments that your data will come from.



   a. Tables:
      i. A typical report might include:
         1. Clients – client ID number, name, SSN, SSN data quality
         2. Households – household ID number, household type
         3. Entry/Exits – entry date, exit date, provider, reason for leaving, destination, household ID

   b. Assessments – the forms you fill out for your program participants and their household members.
      i. You can only get data from assessments that your program ***uses***. Know your program's assessment names prior to getting to this step. You can check your available assessments by looking up any client record and going to the "Assessments" tab, or looking on the Entry or Exit screen for the name of the assessment used for Entry and Exit.

   c. Subassessments – tables within assessments, used to capture history or items that clients can have in multiples (such as disabling conditions or income sources).
      i. Same as assessments – you can only get data from subassessments used by your program. Typical subassessments might include:
         1. Monthly Income and Benefits
         2. Non-Cash Benefits
         3. Disabilities

5) Click the "Fields" tab. You will see a list of data elements available from each table, assessment, or subassessment you chose on the "Tables" tab.

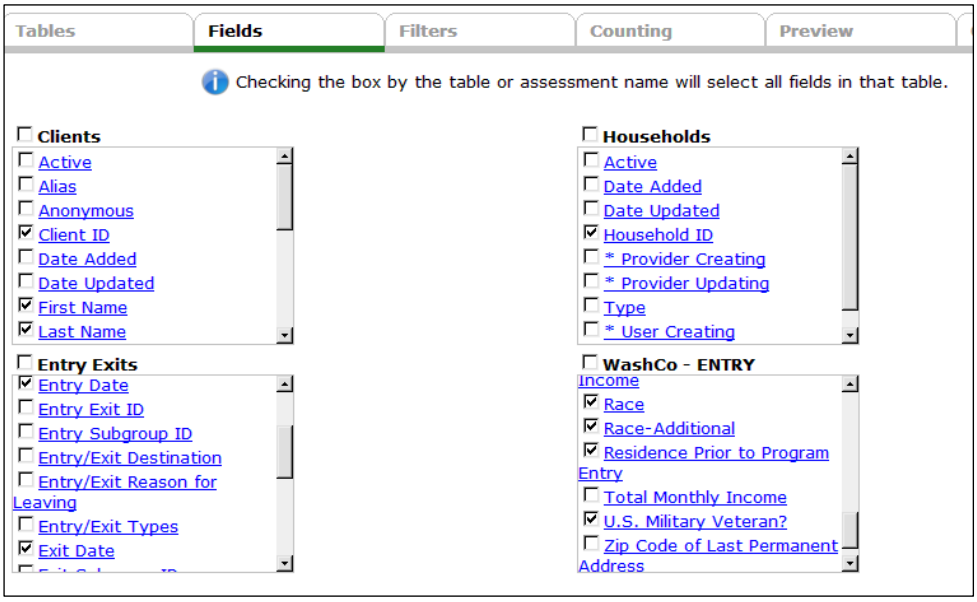
6) Check off the elements you would like to include in your report.
   a. **Note on Assessments** – ReportWriter will only provide you with the most recent answer in the client's history. If an item like "Residence Prior to Program Entry" has 10 responses in its history, only the most recent one will be reported.

i. **Hint**: Most Washington County providers use the "WashCo – Entry" assessment. This has basic demographic data, income, and non-cash benefits, as well as HUD required data elements (disabling condition, veteran status, DV status). It is a good basic assessment to use for most reports.

b. **Note on Subassessments** – ReportWriter will include one line of data for each item in the subassessment that meets the filter criteria you specify in the next step. For example, if you filter for clients with income types that were active 01/01/2013 – 12/31/2013, and you have a client who had three active income types, the client will show up three times on the report – once for each income type. Be prepared for this possibility.

   i. Most commonly used sub-assessments:
      1. Monthly Income
      2. Non-Cash Benefits
      3. Disabilities

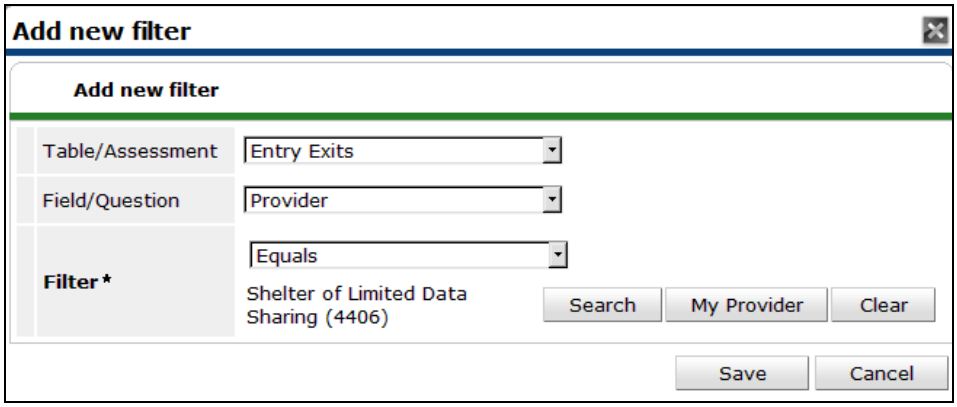
c. If you are unsure whether or not you want to include a data element in your report, you can always preview the report and then remove it later.



7) Next, click on the "Filters" tab. This is where you will enter the parameters for your report. Common parameters are things like Entry/Exit provider, or looking at data for clients who entered a program between two dates, or who had active entry/exit records within a date range.
8) To start any desired filter, click "Add New Filter Group" and then follow the instructions below for basic filters:

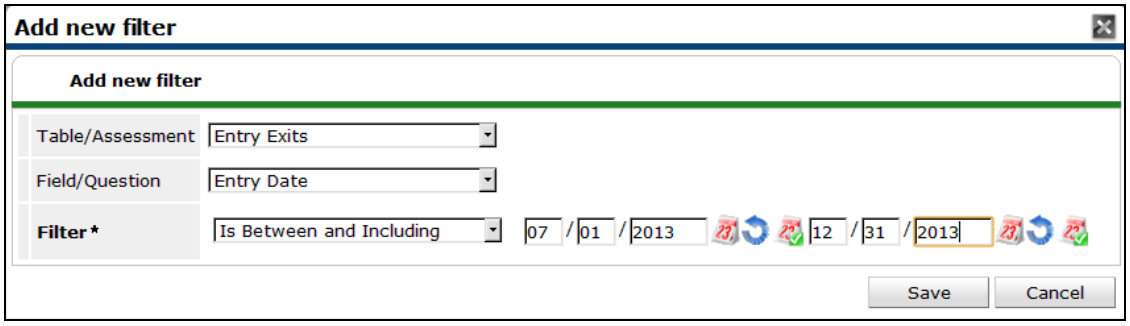
Note – the following instructions assume that you have included the following tables in your report: Entry/Exit, Clients, Households, and the WashCo – Entry assessment

a. **Specific Entry/Exit Provider**
   i. After clicking "Add New Filter Group", click "Add Filter"
   ii. Set "Table/Assessment" to Entry/Exit
   iii. Set "Field/Question" to Provider
   iv. Set "Filter" to Equals and then click "Search" to find a specific provider or program, or click "My Provider" to set it to your current provider.



v. Click "Save" when done.

b. **Clients who entered program during a specific time frame** – this will give you a list of clients whose entry date falls within the specified date range, regardless of exit date.
   i. After clicking "Add New Filter Group", click "Add Filter"
   ii. Set "Table/Assessment" to Entry Exits
   iii. Set "Field/Question" to Entry Date
   iv. Set "Filter" to Is Between and Including and then enter the desired date range.

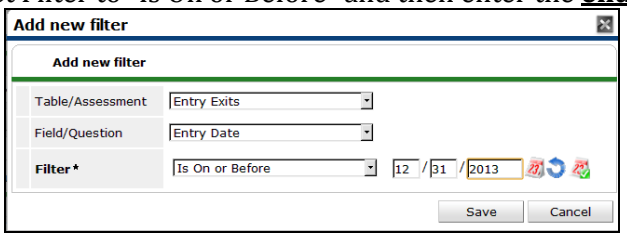


v. Click "Save" when done.

c. **Clients who have exited the program during a specific time frame** – same as above, but set "Field/Question" to Exit Date.
   i. **Note** – if you combine this with an entry date filter, you will get a list of clients whose entry and exit record falls within the specified date range!

d. **Clients with an active entry during a specific date range** – if you want a list of clients who were ***active*** in your program between two dates, this requires two filters, as follows:

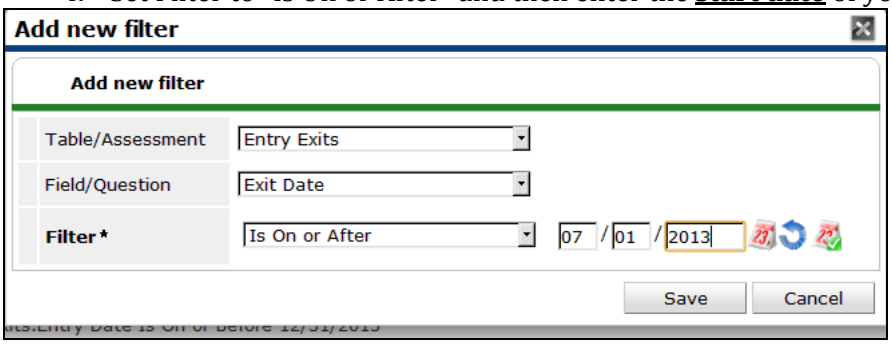
   i. Part 1: Entry Date:
      1. After clicking "Add New Filter Group", click "Add Filter"
      2. Set "Table/Assessment" to Entry Exits
      3. Set "Field/Question" to Entry Date
      4. Set Filter to "Is On or Before" and then enter the **<u>end date</u>** of your reporting period.



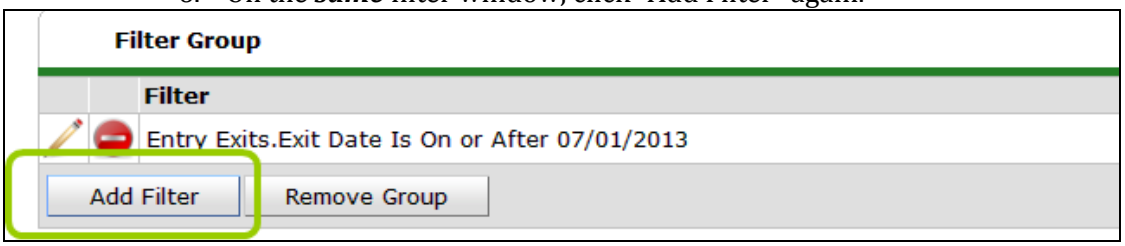
      5. Click "Save" when done.

ii. Part 2: Exit Date:

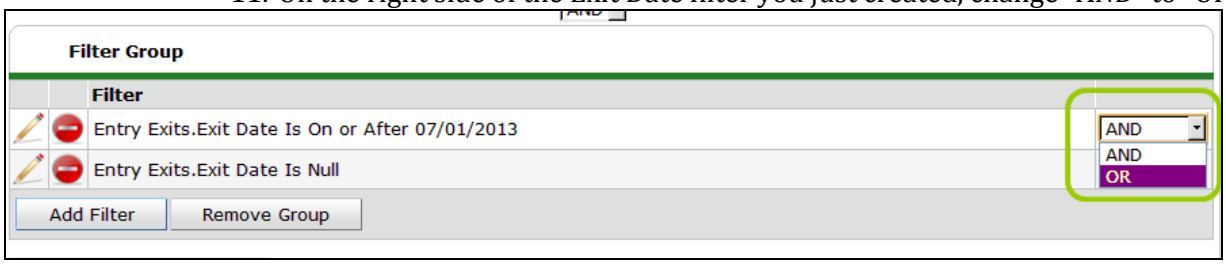
1. Click "Add New Filter Group" and then "Add Filter"
2. Set "Table/Assessment" to Entry Exits
3. Set "Field/Question" to Exit Date
4. Set Filter to "Is On or After" and then enter the **start date** of your reporting period.



5. Click "Save".
6. On the ***same*** filter window, click "Add Filter" again.



7. Set "Table/Assessment" to Entry Exits
8. Set "Field/Question" to Exit Date
9. Set Filter to "Is Null"
10. Click "Save".
11. On the right side of the Exit Date filter you just created, change "AND" to "OR"



12. This will set up the filter to look for anyone whose exit date is null OR occurred after the beginning date of your report.

Note – if you run your report and get no results, the most likely reason is that you forgot to change "AND" to "OR" in this step!

9) When done adding filters, click the Preview tab.
   a. ReportWriter will load the first several lines of data that will be included in your report.

10) If you are happy with the report layout, you can download the report as a spreadsheet by clicking the "Download" button.

11) To change the order of the fields, or re-name them, go to the Options tab.

   a. Under "Column Order and Titles", you can move the fields up or down to determine how they will display in the report. You can also rename them.

b. At the top of the Preview tab, you also have the option to save the report and provide a brief description of the report to help you remember what it's for or what it contains.

Report Examples:

- ☐ Filters can be added for any data element in the tables, assessments, or subassessments you have included in your report.

  - **A report of current clients age 18 and over who have employment** income – include entry/exit, clients, entry assessment (WashCo – Entry), and Monthly Income subassessment and then set filters to:
    - Entry Exit - provider is your provider/program
    - Entry Exit - Exit date is null
    - WashCo – Entry - Date of birth is on or after (minimum date of birth to be 18 as of report date)
    - Monthly Income – Source of Income equals Earned Income
    - Monthly Income – End Date is Null

  - **A report of children who were active in your program within a certain date range:**
    - Entry Exit - provider is your provider/program
    - Entry Exit - Exit date is null OR on or after the start date of your report
    - Entry Exit – Entry date is on or before the end date of your report
    - WashCo – Entry - Date of birth is on or before (minimum date of birth to be under 18 as of report date)

  - **A report of women who were active in your program within a certain date range:**
    - Entry Exit - provider is your provider/program
    - Entry Exit - Exit date is null OR on or after the start date of your report
    - Entry Exit – Entry date is on or before the end date of your report
    - WashCo – Entry – Gender is equal to Female

Using Reports Again:

- ☐ Once a report is saved, you can use it again.

  - Give your reports a standard naming convention so you can find them later (i.e. Community Action reports generally begin with "CAO", Washington County reports generally begin with "WashCo").
  - Filters can be edited – however, do be aware when editing filters that "OR" may change to "AND" during the editing process. If you edit a filter and then get no results, go back and make sure your OR and AND selections are correct!
  - If you see a report made/used by another provider that you want to try, you can load it and edit the filters to match your program/provider. You can then save the edited version of the report with a new name!

- ☐ You can edit saved reports, but you must save them with a new name – there is no option to overwrite reports.

- ☐ **You can see everyone's reports.** Be careful when deleting reports! Do not delete reports that were not created by your provider (see the "Provider" column).

- ☐ Remember that ReportWriter is pretty basic. It's very good at extracting data, but you may need to do some additional work using Excel or Access to get what you want or need.

- ☐ For advanced reporting needs, your agency may elect to purchase a viewer license for the Advanced Reporting Tool (around $300/year per user). Ask your HMIS Administrator if interested.