Service Monitoring [14/15] v6

This report shows all clients who had specific program entries and services entered within the reporting period. It includes a summary of funding sources used in service transactions, a summary of services provided by each case manager, and a monthly breakdown of services. It is typically submitted on a quarterly basis for Joint Office of Homeless Services (JOHS) funded programs, as well as other funders in our local community.

• Do NOT email client information unless you are on an encrypted network, or have password protected the information.

Folder path in SAP BUSINESS OBJECTS:

Public Folder \geq portland_live_folder \geq ART Standard Reports \geq Service Monitoring [14/15] (do not use the version with [PG] in the title unless you have built a Provider Group)

Click the 3-dots icon to the right of the report title or right-click on title and choose Schedule to get started

Public Folders / portland_live_folder / ART	C + ••• (
Title	Favorites 🚊	Туре	Description	Last Updated	
Participant Demographics [PG] V.4.2.2		Web Inte	Race/Ethnicity and	Jul 7, 2022 2:26 PM	000
Sermanent Housing Retention [for OH		Web Inte	•Reporting placeme	May 16, 2022 1:40	000
PHB PDR v.4.2.4 (Participant Demogra		Web Inte	The latest and most	Jul 11, 2022 11:21 AM	000
ROI Audit User ROI Audit v.01		Web Inte	Simple report tab 1	May 16, 2022 1:40	000
Service Monitoring [14/15] v6)	Web Inte	UPDATE 2022 Servi	Jul 6, 2022 8:18 AM	000
Service Monitoring [2014/2015] v5		Web Inte	Services must fall b	May 16, 2022 1:40	000

In the General tab

- Rename report instance
- Add 'BI Inbox' to Delivery Destinations
- Recurrence (run report now or recurring) for recurring reports, the end date should be set far into the future.

Schedule						
General V Report Features V						
Instance Title						
Title* Rename Instance Here						
Destinations						
Add Bl Inbox destination here Selected Delivery Destinations						
Default Enterprise Location 🛞						
Recurrence						
Run Report: Now Schedule recurring instances here						

In the Report Features tab

Change 'Format' to Excel- Reports Click 'Edit Prompt Values' to set parameters Schedule' the Report with the Following Prompts

EDA Provider: Skip this prompt

Enter Effective Date: Equal to End Date plus one day Provider(s): Use the Select button to choose providers Start Date: first date of timeframe you want to review End Date (Plus ONE Day): last day of the timeframe you want to review, plus ONE day

Click 'Schedule'

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Service Monitoring [14/15] v6					es						
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	Enter effective	1/1/2022 12:00:00 AM		C 🗸							
	Provider(s):	-Select-		C 🗸							
	Start Date:	7/1/2021 12:00:00 AM		C ∨							
				Schedule	Clos						

This report has 3 tabs across the bottom:

 Monthly Services Monitoring and All Clients tabs have a column for case manager so clean-up work can be sent to the correct staff member

Cover | Monthly Services Monitoring | A

All Clients

COVER

- Shows how the report was prompted; what start and end dates were used, which programs were pulled into the report, and the date the report was run.
- Shows breakdown of funding sources used to pay for services within the report date range
- Shows breakdown of the number of clients served by each case manager, based on who entered the services

MONTHLY SERVICES MONITORING

- Shows a monthly breakdown of services provided for each month in the report date range
- Shows which funding source was used, and where dollar amounts are Missing
- Shows services that were Voided
- Shows the sum of total of individual service transactions and total money spent each month

ALL CLIENTS

- Shows a list of all clients who had services entered with the report date range
- Clients who got multiple services, will have multiple rows on this tab
- Clients who have multiple entries into the same program, will have multiple rows on the tab, and "#MULTIVALUE" for their entry date