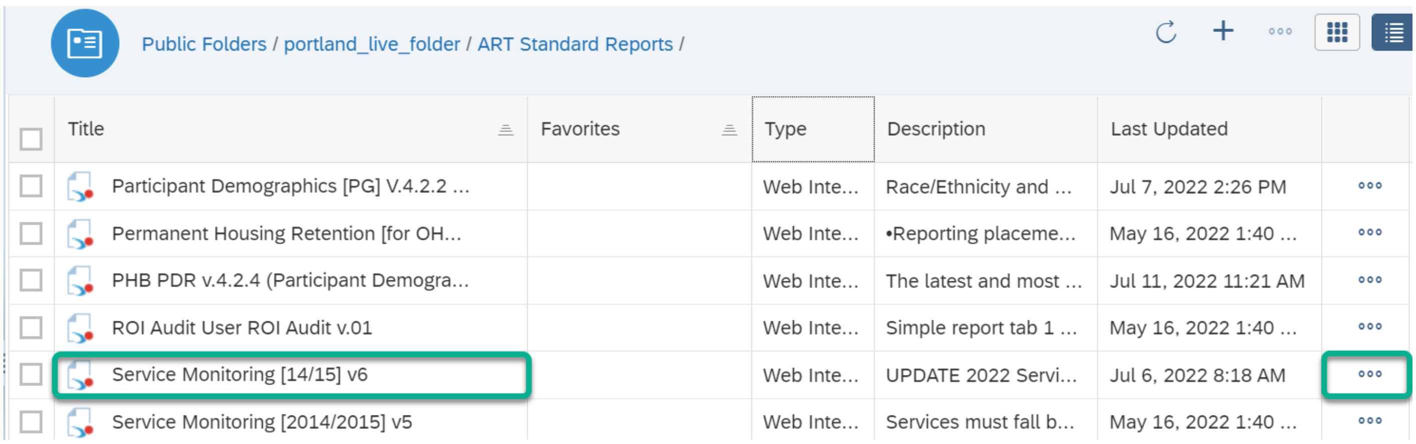
Service Monitoring [14/15] v6
This report shows all clients who had specific program entries and services entered within the reporting period. It includes a summary of funding sources used in service transactions, a summary of services provided by each case manager, and a monthly breakdown of services. 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.

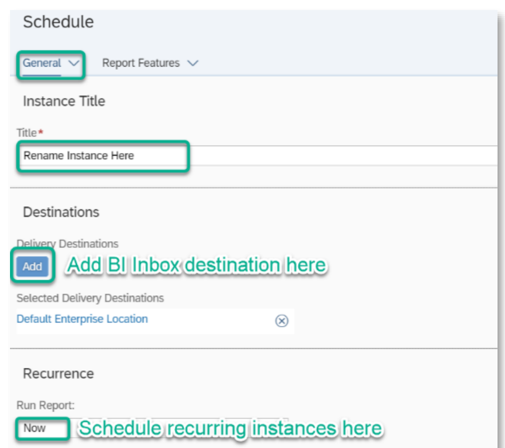
- Do NOT email client information unless you are on an encrypted network, or have password protected the information.

Folder path in SAP BUSINESS OBJECTS:
Public Folder ➢ portland_live_folder ➢ ART Standard Reports ➢ **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



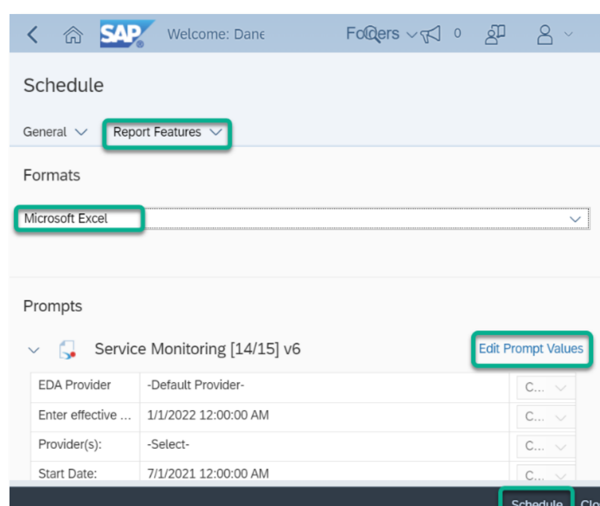
In the General tab

- 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.***



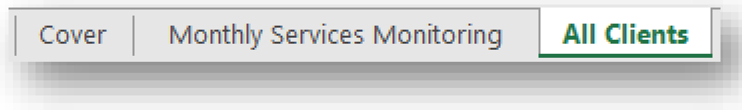
In the Report Features tab
Change 'Format' to Excel- Reports
Click 'Edit Prompt Values' to set parameters
Schedule' the Report with the Following Prompts

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'

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

- 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