

Intro to Reports

Introductions

- ② Name
- ② Agency/Role
- ② Why do you run reports?

Agenda

- ② Data Relationships
- ② Data Elements
- ② Universe of Data
- ② Report Categories
- ② Running Reports
- ② Reading & Understanding
- ② Questions?

Fun Facts – VESTA Reports

As of 1/5/2016, there are:

- ② 103,660 lines of reporting code
- ② 926 active reports
- ② 3,463 report sections

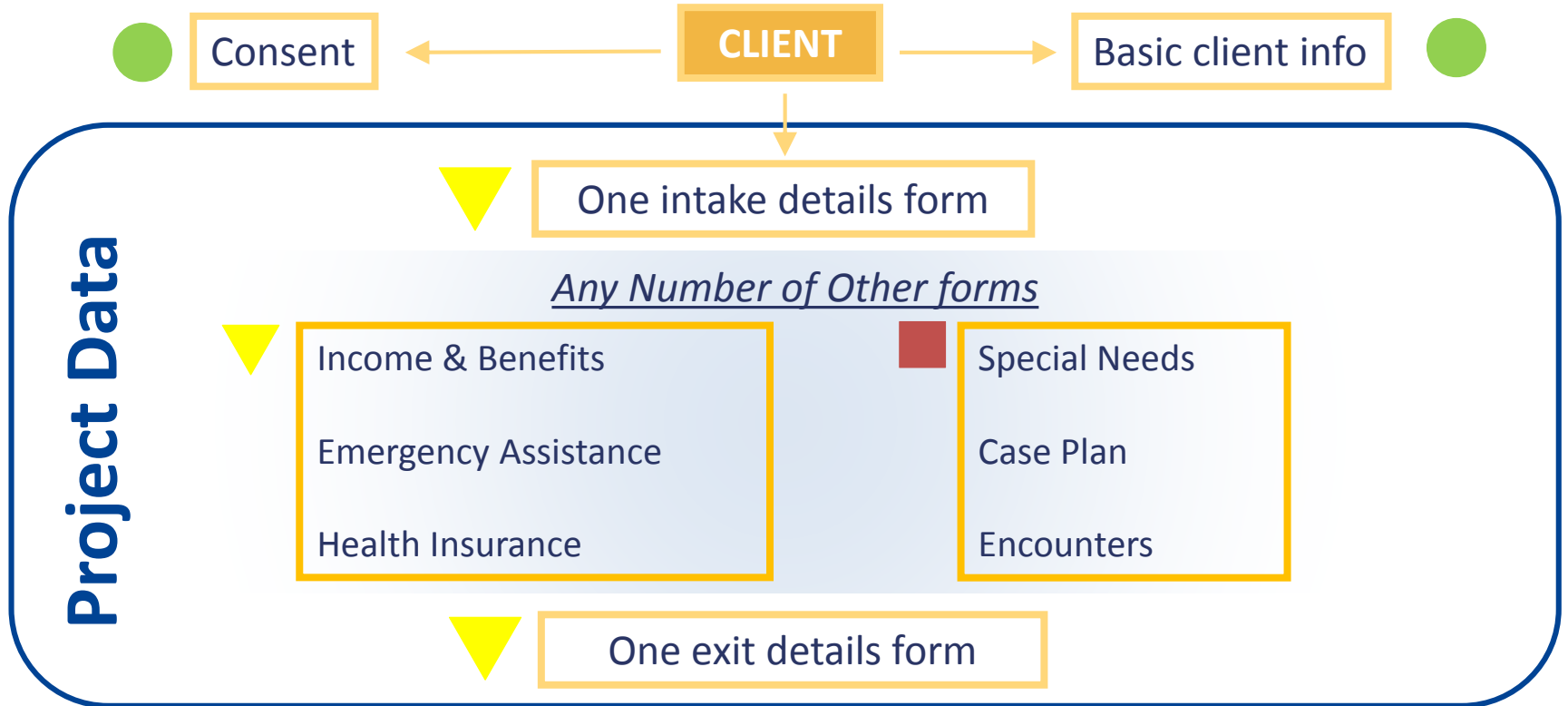
Key Terms

- ② **Project** – the primary level of organizing and collecting data on clients in VESTA. A project often, but not always, corresponds to a specific social service program at an agency.
- ② **Agency** – Corresponds to each organization (Bethany House, Mercy Neighborhood Ministries, etc.) that has one or more projects in VESTA.
- ② **System Reports** – Reports VESTA programmers build for wide-ranging needs (like the HUD APR) or for a particular agency's need. All reports in the Universal, Funder, Agency and Administrative categories are system reports.
 - ② *System reports can be run by many different projects across VESTA. System reports are typically assigned to all projects or groups of similar projects (i.e. HMIS projects, EA projects)*
- ② **Custom reports** – Reports built for specific needs of a project or agency. These reports can be built by VESTA programmers or select VESTA users using FLEXO.

Key Terms

- 🌀 **Duplicated** – Counting people/activity more than once in a report section based on how many times they were served or the activity occurred.
 - 🌀 *i.e. # of intakes, # of referrals*
- 🌀 **Unduplicated** – Counting people only once – even if they were served more than one time in the reporting period.
 - 🌀 *i.e. unique clients served in a date range*
- 🌀 **Grouping** – In databases, to group data is similar to “breaking down data by...” different categories.
 - 🌀 *i.e. “Give me a breakdown of clients by age and gender” translates to “count clients, grouping by age and then by gender.”*


VESTA Data Relationships



Data Elements

Data elements are discrete units of information. Every field on every form in VESTA that has a response is a data element.

● Edit Basic client information for Pat Potter

First name	Pat	Middle name		Last name	Potter	Suffix	
Date of birth	1/14/1985		(m/d/yyyy)	Age: 30			
Other names	<input type="text"/>						
Social security number	<input type="text" value="300122170"/>						
Name data quality	<input type="text" value="Full name reported"/> ▼						
DOB data quality ?	<input type="text" value="Full DOB reported"/> ▼						
SSN data quality	<input type="text" value="Full SSN reported"/> ▼						
Gender	<input type="text" value="Male"/> ▼						
Race ?	<input type="checkbox"/> American Indian/Alaskan Native						
	<input type="checkbox"/> Asian						
	<input checked="" type="checkbox"/> Black/African American						
	<input type="checkbox"/> Native Hawaiian/Pacific Islander						
	<input type="checkbox"/> White						
	<input type="checkbox"/> Client doesn't know						
	<input type="checkbox"/> Client refused						
	<input type="checkbox"/> Data not collected						
Ethnicity	<input type="text" value="Other / none"/> ▼						
Veteran ?	<input type="text" value="No"/> ▼						

Data Elements

- 🌀 Reports show lists of data elements or count the number of data elements that meet a given criteria (i.e. a list of clients and their gender or a count of clients by gender)
- 🌀 Sometimes data is grouped and the corresponding field is unclear
(running the report in detail mode might help you identify the data point or there might be a paragraph explaining where the data comes from)
- 🌀 Don't know / refused vs. Data not collected

03. Gender

Gender ↓	Individuals ↓
a. Male	21
b. Female	37
c. Transgender male to female	0
d. Transgender female to male	0
e. Other	0
f. Don't know / refused	0
g. Data not collected	0
TOTAL	58

07. Zip Codes



Zip code	Households	Individuals
a. Known zip code	22	51
b. Unknown zip code	2	7
TOTAL	24	58

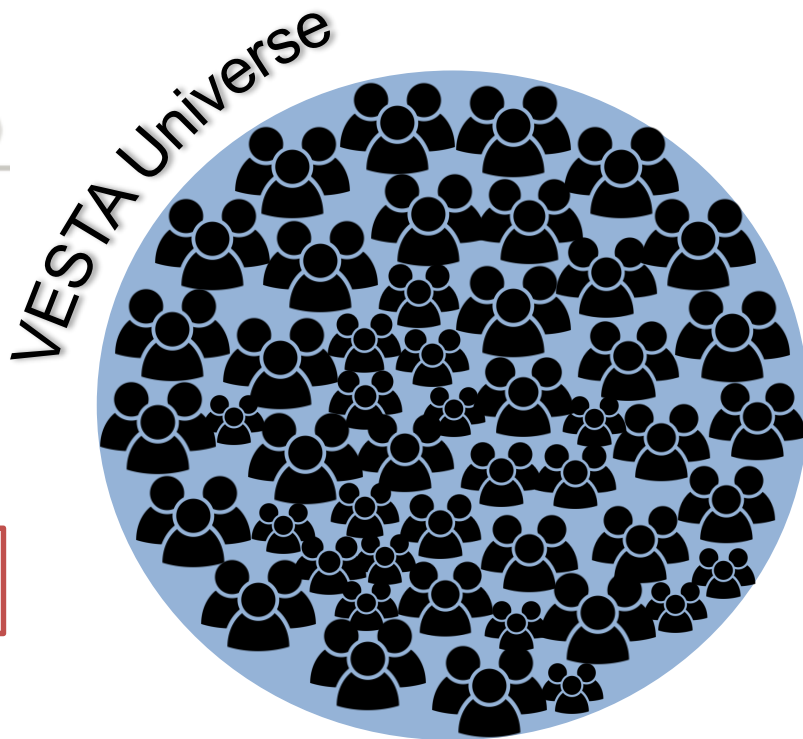
Zip code is pulled from different forms depending on the program type. For EA programs, the zip code comes from each primary client's most recent Residence form dated up to the end of the report range. For most shelters and housing programs, the zip code comes from each primary client's Intake Details form.

Universe of Data – Who are you counting?

Appendix B. Race detail

Race ↓	Individuals ↓
Black/African American	59
Black/African American, White	6
White	20
TOTAL	85

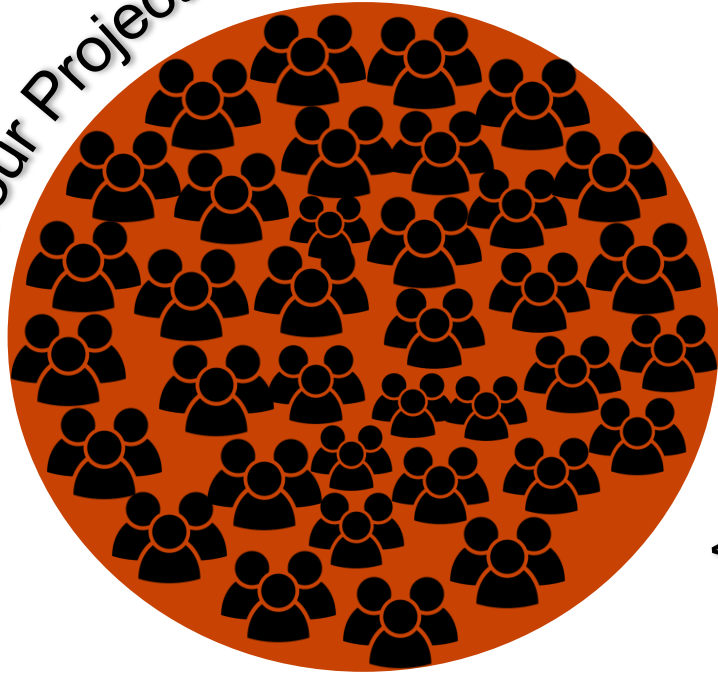
Universe of data: People who were active at any point during the date range



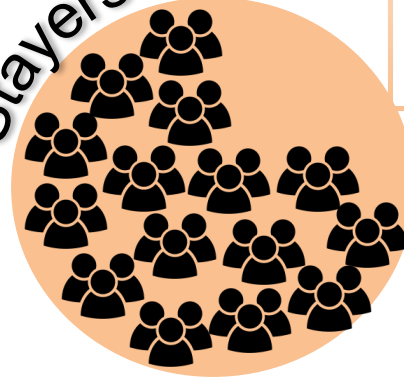
VESTA holds over 300,000 records on unduplicated persons!

Universe of Data – Who are you counting?

Your Project

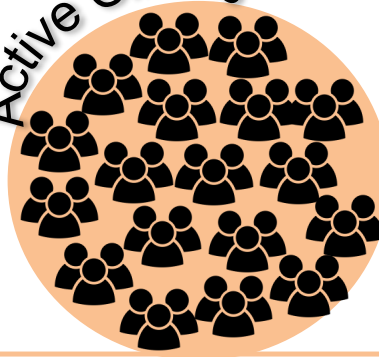


Stayers



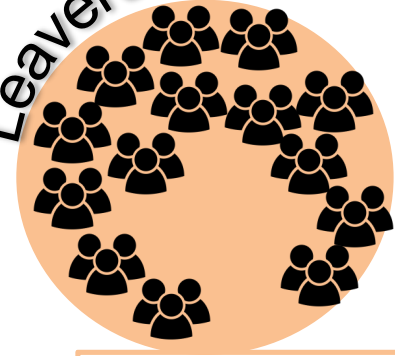
People who were in the project on the last day

Active Clients



HMIS – all clients active in the date range
EA – all clients who received a service in the date range

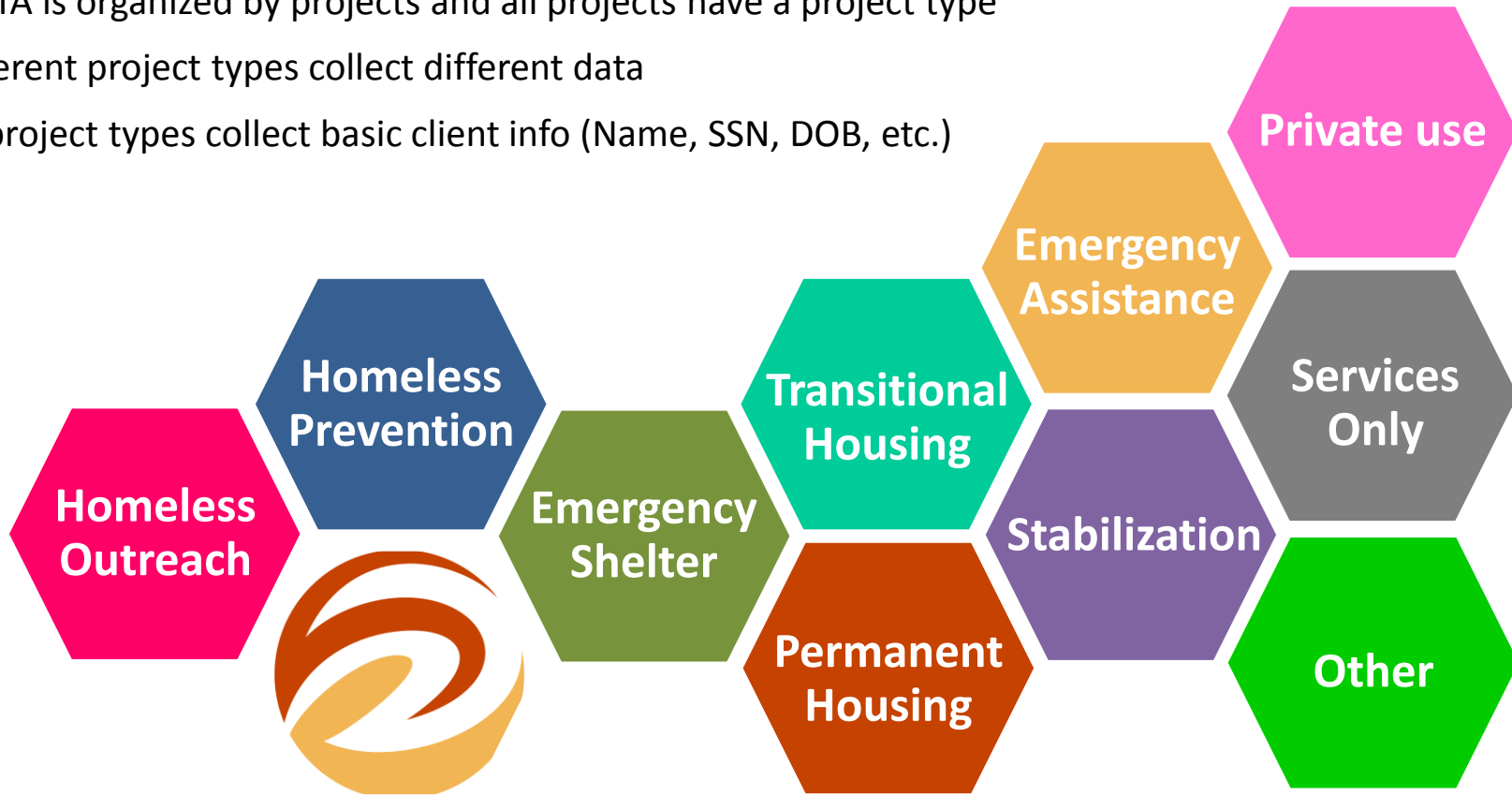
Leavers



People who exited during the date range and who were not active on the last day

VESTA Project Types

- 🌀 VESTA is organized by projects and all projects have a project type
- 🌀 Different project types collect different data
- 🌀 All project types collect basic client info (Name, SSN, DOB, etc.)



Project Type

Federal Program 1:
Federal Program 2:
Federal Program 3:

HUD:ESG – Street Outreach
HHS:PATH – Street Outreach
HHS:RHY – Street Outreach Project

Based on your selections above, the HMIS project type must be:

Street Outreach

1st Component's Project Type:
2nd Component's Project Type:
3rd Component's Project Type:

Street Outreach
Street Outreach
Street Outreach

Based upon the HMIS project type indicated above, the following project-specific data elements must be collected for this project:

Funding Program 1:

Funding Program 2:

Funding Program 3:

HUD:ESG – Street Outreach

HHS:PATH – Street Outreach

HHS:RHY – Street Outreach Project

Element	Required Element	Required Element	Required Element
4.1		Housing Status	
4.2	Income and Sources	Income and Sources	
4.3	Non-Cash Benefits	Non-Cash Benefits	
4.4	Health Insurance	Health Insurance	Health Insurance
4.5	Physical Disability	Physical Disability	Physical Disability
4.6	Developmental Disability	Developmental Disability	Developmental Disability
4.7	Chronic Health Condition	Chronic Health Condition	Chronic Health Condition
4.8	HIV/AIDS	HIV/AIDS	
4.9	Mental Health Problem	Mental Health Problem	Mental Health Problem
4.10	Substance Abuse	Substance Abuse	Substance Abuse
4.11	Domestic Violence		
4.12	Contact	Contact	Contact
4.13	Date of Engagement	Date of Engagement	Date of Engagement
4.14 A		Services Provided - PATH Funded	

Report Categories

Universal

🌀 Universal, Funder, Agency and Administrative reports are developed and maintained by PCL

Funder

🌀 Custom reports are developed and maintained by FLEXO users

Agency

🌀 Archived reports are expected to be inaccurate, but remain available at the request of agencies or funders

Custom

Administrative

Archived

Find Universal – Program Demographic Report

Report Criteria – Date Filters

Report criteria

Start date

End date

Projects
(0 selected)

- BBB - Block-by-Block
- BC - Emergency Assistance
- BC - Homeward Bound Shelter
- BC - Stabilization
- BC - Stable Families
- BHS - ESG Rapid Re-housing
- BHS - Family Shelter
- BHS - Family Shelter 2
- BHS - Hotel / Motel
- BHS - Rapid Re-housing 1
- BHS - Rapid Re-housing 2
- BHS - Rapid Re-housing Pre-entry
- BHS - RRH for Families
- BHS - Shelter Diversion
- CAA - Emergency Assistance
- CAIN - Emergency Assistance
- CAIN - Grace Place
- CARA - Caracole House
- CARA - Caracole House 2
- CARA - Case Management

Homeless or all clients Certified homeless Everyone

Everyone or primary client Primary client and all household members Primary client only

Grant/sub-project
(all selected)

Selected: (all grants)

View Aggregate / summary Details / client information Both aggregate and details

Select a section to run
(all selected)

- (all sections)
- 01. Total Served in the Date Range
- 02. Age of People Served
- 03. Gender
- 04. Race
- 05. Ethnicity
- 06. Financial Status
- 07. Zip Codes
- 08. County of current or most recent residence
- Appendix A. Age detail

Today is X
Monday, January 04, 2016

Dec
Jan
▼
2016
▼
Feb

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Selected: 1/4/2016

Set both start and end dates to...

Report Criteria – Projects & Grants

Report criteria

Start date



End date



Projects

(0 selected)

BBB - Block-by-Block
BC - Emergency Assistance
BC - Homeward Bound Shelter
BC - Stabilization
BC - Stable Families
BHS - ESG Rapid Re-housing
BHS - Family Shelter
BHS - Family Shelter 2
BHS - Hotel / Motel
BHS - Rapid Re-housing 1
BHS - Rapid Re-housing 2
BHS - Rapid Re-housing Pre-entry
BHS - RRR for Families
BHS - Shelter Diversion
CAA - Emergency Assistance
CAIN - Emergency Assistance
CAIN - Grace Place
CARA - Caracole House
CARA - Caracole House 2
CARA - Case Management

Select all projects

Homeless or all clients

Certified homeless

Everyone

Everyone or primary client

Primary client and all household members

Primary client only

Grant/sub-project

(all selected)

(all grants)

Refresh based on projects

Selected: (all grants)

View

Aggregate / summary Details / client information Both aggregate and details

Use Ctrl
to select
multiple projects
or
grant/sub-projects

Report Criteria – Homeless & Household

Report criteria

Start date

End date

Projects

(0 selected)

- BBB - Block-by-Block
- BC - Emergency Assistance
- BC - Homeward Bound Shelter
- BC - Stabilization
- BC - Stable Families
- BHS - ESG Rapid Re-housing
- BHS - Family Shelter
- BHS - Family Shelter 2
- BHS - Hotel / Motel
- BHS - Rapid Re-housing 1
- BHS - Rapid Re-housing 2
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- BHS - RRH for Families
- BHS - Shelter Diversion
- CAA - Emergency Assistance
- CAIN - Emergency Assistance
- CAIN - Grace Place
- CARA - Caracole House
- CARA - Caracole House 2
- CARA - Case Management

Select all projects

Homeless or all clients

Certified homeless Everyone

Everyone or primary client Primary client and all household members Primary client only

Grant/sub-project

(all selected)

Refresh based on projects

Selected: (all grants)

View

Aggregate / summary Details / client information Both aggregate and details

Select a section to run

(all selected)

- (all sections)
- 01. Total Served in the Date Range
- 02. Age of People Served
- 03. Gender
- 04. Race
- 05. Ethnicity
- 06. Financial Status
- 07. Zip Codes
- 08. County of current or most recent residence
- Appendix A. Age detail

Report Criteria – View & Sections

Report criteria

Start date

End date

Projects (0 selected)

- BBB - Block-by-Block
- BC - Emergency Assistance
- BC - Homeward Bound Shelter
- BC - Stabilization
- BC - Stable Families
- BHS - ESG Rapid Re-housing
- BHS - Family Shelter
- BHS - Family Shelter 2
- BHS - Hotel / Motel
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- CAIN - Grace Place
- CARA - Caracole House
- CARA - Caracole House 2
- CARA - Case Management

Select all projects

Homeless or all clients Certified homeless Everyone

Everyone or primary client Primary client and all household members Primary client only

Grant/sub-project (all selected)

Selected: (all grants)

Aggregate/summary view – these are generally counts and/or percentages (the big picture)

Details/client information – the client level data that is used to create the aggregate count

View Aggregate / summary Details / client information Both aggregate and details

Select a section to run (all selected)

- (all sections)
- 01. Total Served in the Date Range
- 02. Age of People Served
- 03. Gender
- 04. Race
- 05. Ethnicity
- 06. Financial Status
- 07. Zip Codes
- 08. County of current or most recent residence
- Appendix A. Age detail

Running Reports – Enhance your view

Run the report

View here

Download as Excel file

Email me

Or download into a template (requires Microsoft® Office 2007 or newer):

UW Demographics ▼

Go

- 🌀 **View here** – displays the report on your screen
- 🌀 **Download as Excel file** – opens an excel spreadsheet of the report
- 🌀 **Email me** – will e-mail you an Excel spreadsheet of the report (this is very useful when running large reports)
- 🌀 Some reports contain a Word template which pre-fills data into a form

Running Reports – Enhance your view

Appendix A. Age detail



Most reports have one or more of the following icons at the top of each section



The **clipboard** copies the section data and can be pasted into Excel



The **highlighter** highlights rows of data as you move the cursor



The **magnifying glass** opens the section in detail mode in a new tab



The **push pin** is used to pin the header row of a report to the top of the section to make scrolling easier



This icon resets any sorting you've done in the section

Running Reports – Enhance your view

Some reports or sections have a downward arrow. Clicking on the arrow will sort the section alphabetically or numerically by that column.

Appendix B. Race detail

<i>Race</i> ↓	<i>Individuals</i> ↓
Black/African American	50
Black/African American, White	3
White	5
TOTAL	58


Appendix B. Race detail


<i>Race</i> ↓	<i>Individuals</i> ↓1
Black/African American, White	3
White	5
Black/African American	50
TOTAL	58

A number will appear next to the arrow after it's been activated. This number indicates the order in which the sorting has been applied.

Reading & Understanding Reports

All report results and report sections have an expand/collapse button to aid in navigation

  *Report results* 


 01. Total count of individuals served


 02. Age group

 03. Sex

 04. Female head of household

 05. Ethnic background

 06. Income level


 07. Average number served daily

 08. Family makeup

 09. Special needs

Reading & Understanding Reports

Depending on the report and the section, there may be a short description of the section and how the data is pulled for that report or section.

01. Total Served in the Date Range 

<i>Households</i>	<i>Individuals</i>
24	58

Universe of data: People who were active at any point during the date range
Unduplicated count of clients and households with services in the date range. The universe of clients is the standard one as defined for each selected program. For housing programs, the universe typically uses each client's intake and exit dates. For services programs such as emergency assistance, the universe is typically those clients with an Emergency Assistance, Stabilization, Food/clothing, or Financial Assistance form in the date range. If you have a question about how clients are selected for particular programs, please [contact VESTA support](#).

Why do I get different results?

Run reports: VESTA – Intro to Reports – Example 1
VESTA – Intro to Reports – Example 2






- 🌀 Check the universe
- 🌀 Check your filters
- 🌀 Check the projects
 - 🌀 Did you select the right one?
 - 🌀 Do you have access?
 - 🌀 Did you mix project types?
- 🌀 Check the notes
- 🌀 Read the report description
- 🌀 Living database
- 🌀 Still don't know? Call tech support.

Tips and Tricks





- 🌀 If you get a red error message, send a screenshot to Tech Support
- 🌀 If the report seems “slow,” don’t keep clicking View Here/Go
- 🌀 Plan ahead – if you are running a long date range, a long report, or lots of data (i.e. quick services) make sure you have plenty of time
- 🌀 Tell VESTA to e-mail you if you need to run

Common and Useful Reports

HMIS

-  Universal – Recidivism
-  Admin – Monitoring Report 4.0
-  HUD – Annual Performance Report 2014
-  UW – City of Cincinnati Outcomes Report
-  Universal – Bed night list

Emergency Assistance

-  Universal – Health Insurance Report
-  UW – Investment Emergency Assistance Report
-  UW – EA Data Quality
-  UW – EA Visits

Please take your Post-Test before you leave

- ② You must get at least 85% on the post-test to qualify for FLEXO
 - ② *If you choose not to take the post-test at this time, you will have to retake the entire class and take the post-test to be eligible for FLEXO.*
- ② Completing the post-test & evaluation will help us improve trainings
- ② You may use VESTAdemo (including Help & More), the PowerPoint handout for assistance, or your own notes

Come back and see us!

- 🌀 Trainings are offered year-round on a variety of topics – check the [PCL](#) website for a current listing
- 🌀 Interested in FLEXO? Let us know.
- 🌀 Eligibility Requirements
 - 🌀 *Complete trainings: One-on-one, Power of Together & Intro to Reports*
 - 🌀 *85% or better on Intro to Reports post-test*
 - 🌀 *Excellent data quality, low number of error alerts, active/frequent user*
 - 🌀 *Must be a VESTA user for at least 6 months at your agency*

