CaseWorthy – Running Active Client List

The instructions below were created from a <u>CaseWorthy document</u> addressing additional needs. It is linked here for your reference and contains links to further resources.

1. Ensure correct Role is selected. Click on arrow at top right corner to expand user area as displayed below.

Organization	
Empowered Solutions Group	•
Provider	
Test Provider - HUD PSH	•
Role	
Supportive Housing (SHP)	-

- 2. Running the CAPER
 - a. Click the wrench icon to switch to "Administration" > then click "Reporting" in left side menu > then click "Compliance Reports (Org)" as shown in screenshot below

Empowered Solutions	= 🛎 🗡				
Group	Dashboard				
▼ Reporting	XML Report Exports				
Current Vets	Lel Operational Reports (Org)				
	Led Compliance Reports (Org)				
	Lud. CaseWorthy Analytics - Ap Builder				

- b. Click on "ESG CAPER (2022) (Org)"
- c. Enter the report "Start Date" and "End Date"

Tip: For PATH monitoring purposes, an easy way to generate a client list from the past year is simply to use the date the report is run for the "End Date" and then 1 year prior as the "Start Date"

- d. Choose the "Project(s)" for which you wish to run the report
 - i. Click the magnifying glass and select from list of programs. Then choose "Add Selected" once all programs are chosen.
 - ii. Click "Report" button to launch the report. A pop up window will appear, and the report will load unless pop-up blockers are on
- 3. Accessing Client Detail Sub Report
 - a. On page 2 of the report, click "Client Detail SubReport" hyperlink



- b. To export report to Excel, follow steps below
 - i. Click on disk Icon > Choose Excel or other desired format listed > Save file, then locate downloaded file to review and edit

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home.cthmis.com/CaseWorthy_8_0/ReportViewer.aspx?FormID=14883&URLID=1071105									
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Client Detail Sub Report						Word			
HUD APR Drilldown : Multiple Questions					2	Excel	asewo		
Date Range:					Organiza	PowerPoint			
Program(s)						PDF			
Client ID Last Name First Name Family ID Relation To Ho						TIFF file	19		
						MHTML (web archive)			
228802			- 1	Self		CSV (comma delimited)	en and Adults		
228804				Self		Pipe Delimited TXT	ildren		
266296			- 1	Head of child	of househ	XML file with report data	en and Adults		
252138 Head of househ					-	en and Adults			

4. Prior to submitting the Client List for PATH Monitoring, delete all columns of data except Client ID, Program Name, Enrollment Begin and Enrollment End.