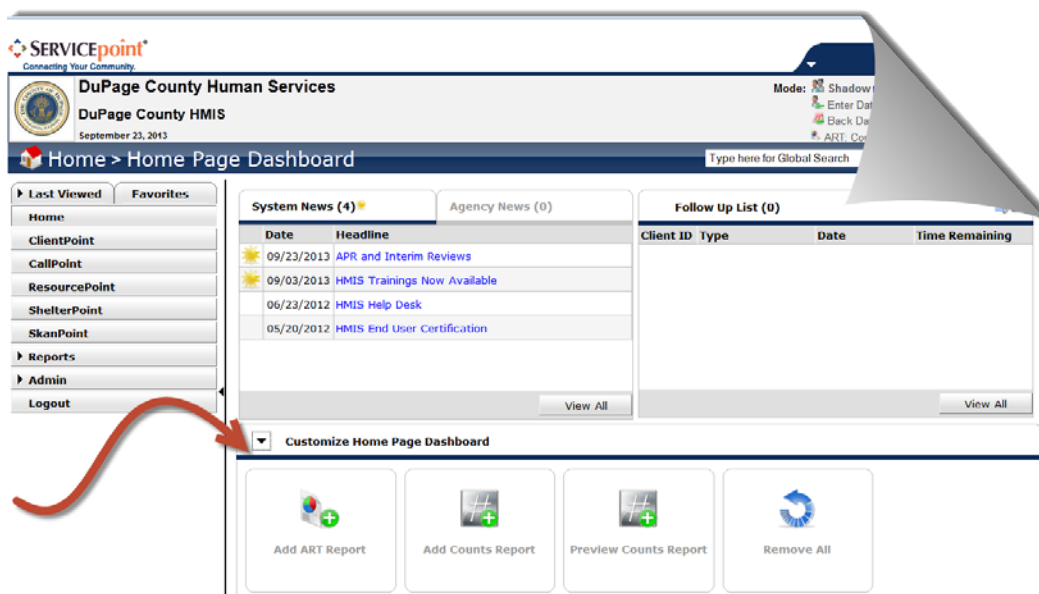


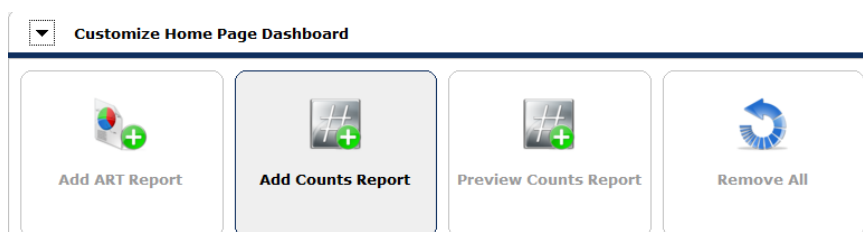
# COUNTS REPORTS

**End Users** have the ability to customize their Home Page Dashboard by including *Counts Reports*. Furthermore, **Agency Data Administrators** may also customize their End Users' Home Page Dashboard through the use of *Shadow Mode*.

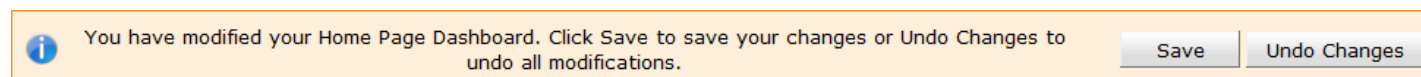


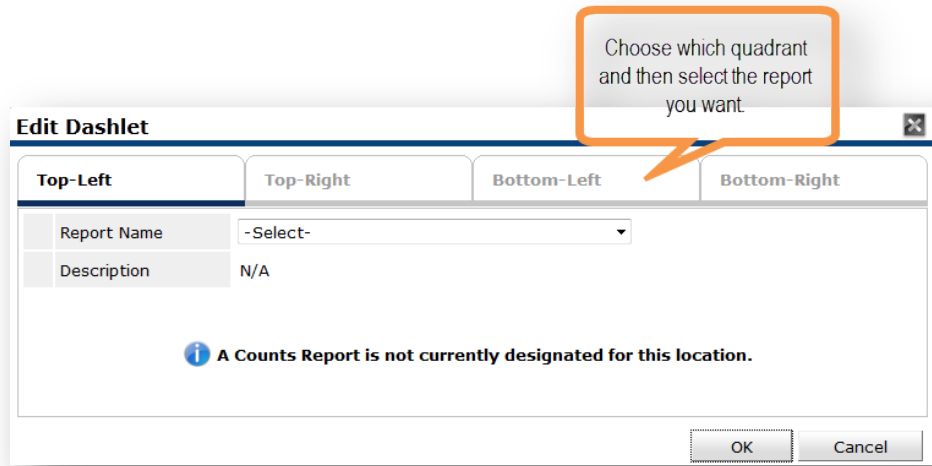
**Counts Reports are an excellent tool to:**

- quickly obtain client and service counts
- determine who is due to be exited from a program
- view who is currently enrolled in the program
- identify data quality issues
- track assigned clients and the follow-ups that have been scheduled



**Note** Each time a customization takes place on the Home Page Dashboard, the following message will appear and a selection must be made to continue.





## Setting the Filters

- *Date* – Choose the date parameters from the *Select Dates* drop-down menu.

- *Provider Type* – This will default to *Provider* and will typically remain the same.
- *Provider* – Choose the provider that the report will run for. “My Provider” may be selected to quickly to choose the provider the End User is logged-in as.
- *Include Subordinates* – Select this option to run the report for this provider and all subordinate providers in it’s provider tree.

## Suggested Counts Reports

### End Users

- My Clients
- My Clients with a follow-up scheduled
- My Clients With An Entry But No Exit
- My Clients With Null UDEs

### Program Managers

- Calls Taken
- Clients Served
- Clients With Current Entries
- Incoming Referrals
- Services Provided