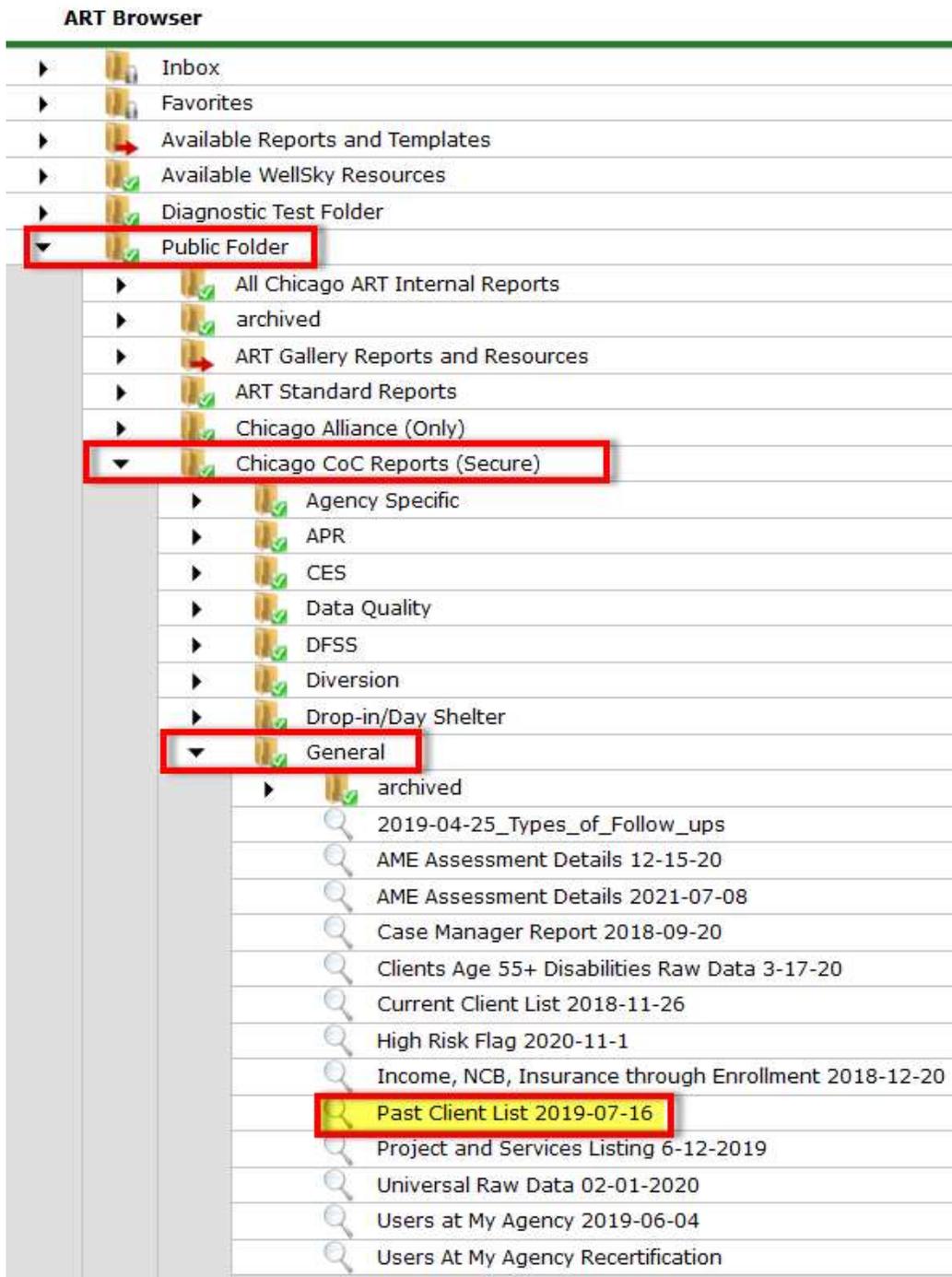


## Past Client Report – (Finding clients served during a time period)

The Past Client Report will provide a list of clients that were/are active in a project during a given time frame. This report will give you a list of clients, some demographics as well as some program information.

The report is located in the Public Folder>Chicago CoC Reports (Secure)>General Folder.



\*To schedule this report, please see [this](#) article on [scheduling ART reports](#).

## Running the report

1. Click the Magnifying glass next to the report.

## Past Client Report – (Finding clients served during a time period)

2. Click View Report.

**ART Item Details**

**Past Client List 2019-07-16**

Name	Past Client List 2019-07-16
Description	
Creation Date	2019-01-08 14:43
Update Date	2021-07-09 10:43
Type	Webi
Owner	chicago_live:adamcz

View Report Edit Report Schedule Report Send Organize

3. Enter your project(s) by searching in the field highlighted below, then hit the binoculars to find it. When it pops up, click the arrow to move it from the left window over to the right.

**Prompts**

Reply to prompts before running the query.

- Select Provider(s)
- EDA Provider -Default Provider-
- Enter effective date 1/1/2020 12:00:00 AM
- Start Date 1/1/2019 12:00:00 AM
- End Date Plus 1 Day 7/1/2019 12:00:00 AM

Type values here

Above and Beyond Family Recovery Center(1635)...(N

Provider

- Above and Beyond Family Recovery Center(1635)
- Above and Beyond Family Recovery Center - Emergency and Transiti
- Above and Beyond Family Recovery Center - Permanent Supportive t
- A. B. - PSH(1613)
- Abraham Lincoln Centre(124)
- Abraham Lincoln Centre Center for Working Families(579)
- Access Living Metropolitan of Chicago(844)
- Access Living Of Metropolitan Of Chicago - HPRP(845)

July 12, 2021 1:27:32 PM GMT-06:00

Enter your search pattern here

Enter your project name or preferably ID here and hit the arrow to move the project to the right window.

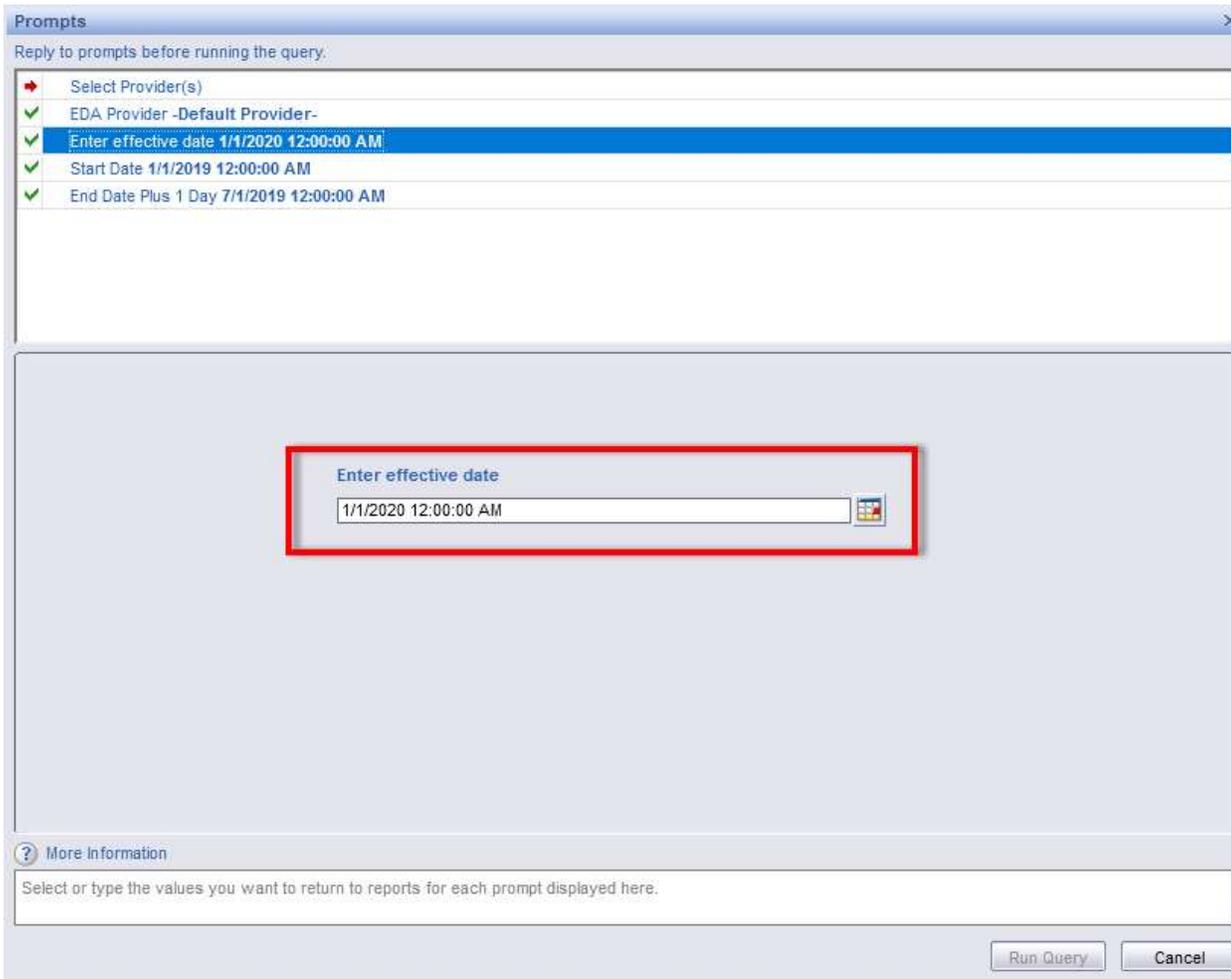
More Information

Select or type the values you want to return to reports for each prompt displayed here.

Run Query Cancel

## Past Client Report – (Finding clients served during a time period)

4. Set the "Enter effective date" to either the current date or to a date in the future. If this isn't set, the report will not pull in any data entered into ServicePoint after this date.



The screenshot shows a 'Prompts' dialog box with a list of prompts. The 'Enter effective date 1/1/2020 12:00:00 AM' prompt is selected and highlighted in blue. Below the list, a text input field for 'Enter effective date' contains the value '1/1/2020 12:00:00 AM' and is highlighted with a red rectangular box. At the bottom right, there are 'Run Query' and 'Cancel' buttons.

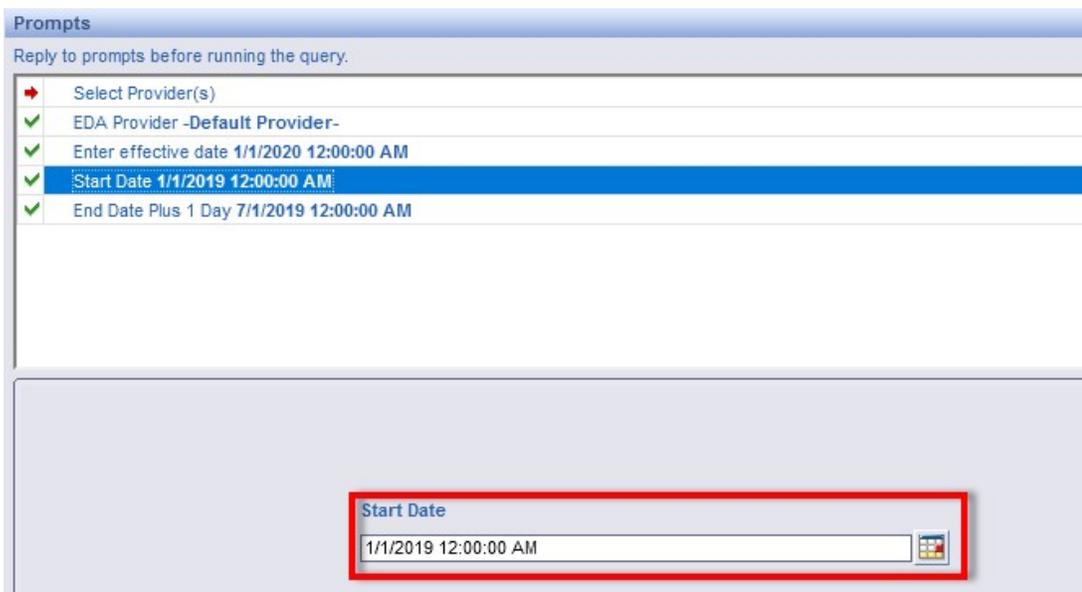
Icon	Prompt
+	Select Provider(s)
✓	EDA Provider -Default Provider-
✓	Enter effective date 1/1/2020 12:00:00 AM
✓	Start Date 1/1/2019 12:00:00 AM
✓	End Date Plus 1 Day 7/1/2019 12:00:00 AM

Enter effective date  
1/1/2020 12:00:00 AM

More Information  
Select or type the values you want to return to reports for each prompt displayed here.

Run Query Cancel

5. Enter the "Start Date".



The screenshot shows the same 'Prompts' dialog box. The 'Start Date 1/1/2019 12:00:00 AM' prompt is now selected and highlighted in blue. Below the list, a text input field for 'Start Date' contains the value '1/1/2019 12:00:00 AM' and is highlighted with a red rectangular box.

Icon	Prompt
+	Select Provider(s)
✓	EDA Provider -Default Provider-
✓	Enter effective date 1/1/2020 12:00:00 AM
✓	Start Date 1/1/2019 12:00:00 AM
✓	End Date Plus 1 Day 7/1/2019 12:00:00 AM

Start Date  
1/1/2019 12:00:00 AM

## Past Client Report – (Finding clients served during a time period)

6. Enter the "End Date, Plus 1 Day". If you are looking for data up until 6/30, you'll put 7/1 in this space. This will ensure the report pulls in data up to 12 am on that day.

**Prompts**

Reply to prompts before running the query.

➔	Select Provider(s)
✓	EDA Provider -Default Provider-
✓	Enter effective date 1/1/2020 12:00:00 AM
✓	Start Date 1/1/2019 12:00:00 AM
✓	End Date Plus 1 Day 7/1/2019 12:00:00 AM

End Date Plus 1 Day

7. After entering your criteria, hit "Run Query" and wait for the report to generate.

## Past Client Report – (Finding clients served during a time period)

Prompts

Reply to prompts before running the query.

- ✓ Select Provider(s) All Chicago - EHI Accelerated Moving Event(1730)
- ✓ EDA Provider -Default Provider-
- ✓ Enter effective date 1/1/2020 12:00:00 AM
- ✓ Start Date 1/1/2019 12:00:00 AM
- ✓ End Date Plus 1 Day 7/1/2019 12:00:00 AM

Type values here

Refresh Values

Provider

All Chicago - EHI Accelerated Moving Event(1730)

July 12, 2021 1:40:41 PM GMT-06:00

1730

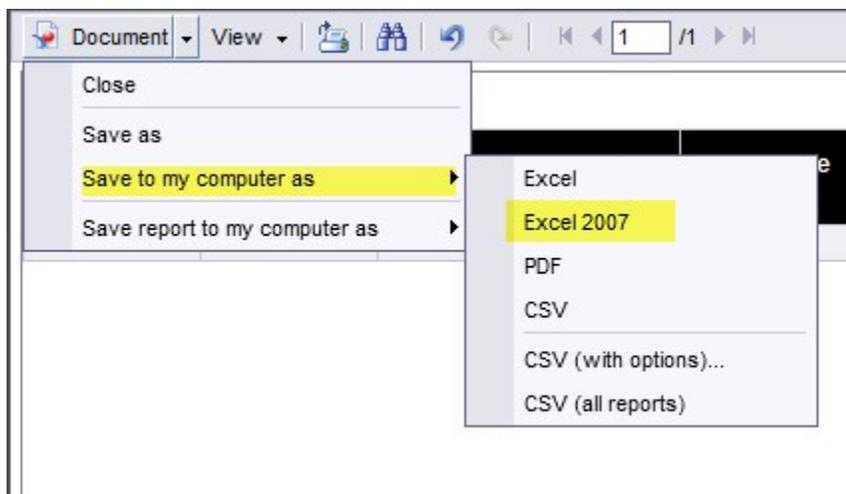
Currently-selected values in listbox:

All Chicago - EHI Accelerated Moving Event(1730)

Run Query Cancel

After your report has generated, you can download your report into Excel to filter as you choose.

To save your report, click on the arrow next to "Document" in the upper left corner. From the drop down, choose "Save to my computer as" and then "Excel 2007".



For any other questions regarding the report or suggestions regarding this article, please contact the Help Desk by either filling out this [form](#) or emailing [helpdesk@allchicago.org](mailto:helpdesk@allchicago.org) to create a ticket.