

How to Run Client and Service Count Data in e2Fulton

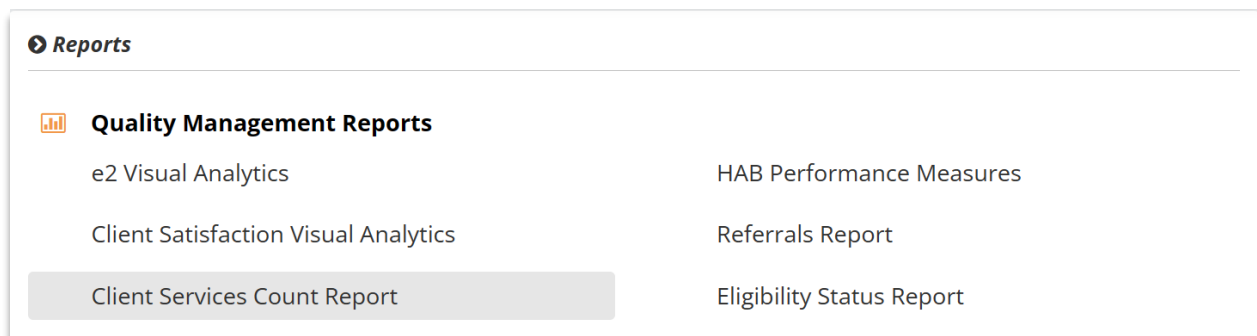
This guide is designed to be a high-level overview for agencies on the *Client Services Count Report*. It includes sections on [running the report](#) as well as [interpreting the report](#).

This is how you will keep track of the number of clients served and services provided by your agency. It is recommended that you run this report **monthly** to ensure that you are on track for your client and service targets and that this is accurately reflecting your number of clients served.

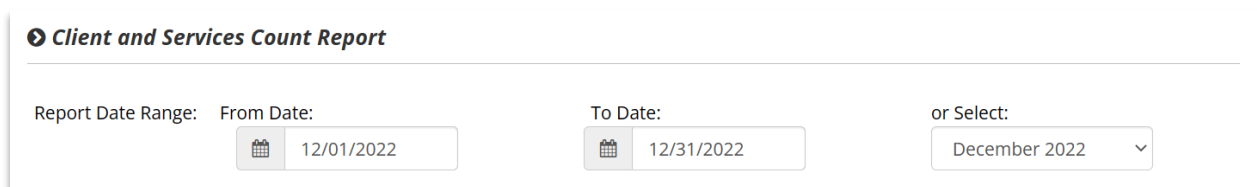
Running the Report

Step 1:

- Log in to e2Fulton
- Go to Reports
- Select *Client Services Count Report*.



Step 2: Put in the date range.



Please Note: Service Targets are set monthly, but you may choose to run this quarterly or fiscal year to date to track your progress.

Step 3: Specify Funding Source(s) if desired. This allows you to select clients and services that were funded under a particular contract or funding source (e.g., Part A, MAI, EHE).

Specify Contract(s): ×

Step 4: Specify Eligibility.

Specify Eligibility Include All Services Only Eligible Services

- *Include All Services* – shows all clients/services with services in the date range
- *Only Eligible Services* – shows clients/services with eligible services in the date range. To be eligible, clients must have appropriate documentation as indicated in [PPPN-001](#) at the time of service.

Step 5: Include Subservice Details if desired.

Include Subservice Details: ▾

Step 6: Run the Report. You will have the option to export to PDF or excel.

Interpreting the Report

The report will generate a table similar to the below. It will reflect the services entered for your agency in the selected date range.

	Clients	New Clients ?	Newly Diagnosed ?	Units	Total	Amount Received	Not Received
Case Management (non-medical)	43	0	0	50.00	\$0.00	\$0.00	\$0.00
Linguistics Services	7	0	0	7.00	\$0.00	\$0.00	\$0.00
Medical Nutrition Therapy	6	0	0	6.00	\$0.00	\$0.00	\$0.00
Medical Transportation Services	1	0	0	1.00	\$0.00	\$0.00	\$0.00
Outpatient/Ambulatory Health Services	124	1	0	392.00	\$0.00	\$0.00	\$0.00
Total	148	1	0	456.00	\$0.00	\$0.00	\$0.00

If you select, *Include Subservice Details = Yes*, you will see a breakdown of each Service Category by subservice.

Case Management (non-medical)	Clients	New Clients ?	Newly Diagnosed ?	Units	Total	Amount Received	Not Received
Benefits/Financial Counseling	15	0	0	16.00	\$0.00	\$0.00	\$0.00
Patient Navigation - NMCM	31	0	0	34.00	\$0.00	\$0.00	\$0.00
Total	43	0	0	50.00	\$0.00	\$0.00	\$0.00

Each table will show:

- **Clients** – total number of clients served in the reporting period
- **New Clients** – total number of clients served with an intake date in the reporting period
- **Newly Diagnosed Clients** – total number of clients served with an HIV positive date in the reporting period.
- **Units** – total number of service units provided
- **Total, Amount Received, Not Received** – this information pulls from Fiscal tabs and may or may not be available for your agency