How to Run the Eligibility Status Report in e2Fulton

This guide is designed to be a high-level overview for agencies on the Eligibility Status Report. It includes sections on running the report as well as interpreting the report.

This report allows you to look at your agency’s clients by eligibility status. It is most useful for looking at clients with eligibility that will expire in the next 30 days.

Running the Report

Step 1:
• Log in to e2Fulton
• Go to Reports
• Select Eligibility Status Report.

Step 2: Specify Service Category
Step 3: Select Service Date Range

Step 4: Select Display Options

Pro Tip: Select *Only upcoming recertification (within 30 days)* to just see clients with expiring eligibility.

Step 5: Run the Report

You have the option to export to excel or view in the browser.
Interpreting the Report

The Report will generate the eligibility for all clients served in the service date range. The records are grouped by clients’ e2IDs, then sorted with the latest eligibility period on top (a client may have multiple eligibilities listed). The report will appear similar to the below:

<table>
<thead>
<tr>
<th>e2ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Plan</th>
<th>FPL</th>
<th>County</th>
<th>Recert. Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSH56</td>
<td>Doe</td>
<td>Jack</td>
<td>2/1/2023</td>
<td>1/31/2024</td>
<td>Part A, Part B, Part C</td>
<td>0%</td>
<td>Dekalb</td>
<td>Active</td>
</tr>
</tbody>
</table>

The eligibilities for each client are color-coded:

- **White**: Future eligibility period
- **Green**: Current active eligibility period
- **Yellow**: Current active period expiring within 30 days
- **Gray**: Expired eligibility period
- **Red**: Deleted client

**Pro-tip:** You can use this report to focus in on clients with expiring eligibility (yellow highlighted clients). You can do this in one of several ways:

- by selecting *Only upcoming recertification (within 30 days)* as illustrated in Step 4
- sorting by *Recert. Due* column to sort by the number of days until recertification is due.