

## How to Run Reports on your Applicant Pool

1. Sign on to HousingWorks
2. Locate the orange-colored 'csv' button, and click it to download your Applicant Data.

Refresh Search  
Refresh All Results

Start working with a new client  
Check if an applicant's profile is already in the system.

SSN  
[Input Field]

or  
Last Name  
[Input Field]

and  
DOB  
[Input Field]  
E.g. 02/09/2008

Try Jan 1, 1901 as a "fallooby" date.

Search

Name	Household Size	Birthdate	SSN	Search Results	...of Zip code	Search Radius	County	Updated date	Advocate(s)
Client names show here.	1	1956-08-31	SSNs show here.	493	02116	5 Miles		2015-11-25	ssaim@hchp.org
	1	1966-05-14		452	02118	10 Miles		2015-11-25	ssaim@hchp.org
	1	1962-12-26		481	02118	10 Miles		2015-11-25	ssaim@hchp.org
	1	1967-08-01		493	02116	5 Miles		2015-11-30	ssaim@hchp.org
	1	1963-12-10		401	02123	10 Miles		2016-02-08	ssaim@hchp.org
	1	1961-05-19		854	02446	10 Miles		2016-02-09	ssaim@hchp.org

3. The data file will either OPEN, or it will SAVE to your *Downloads* folder. It will be called "**advocate\_clients.csv**". Find this data file and open it: it will look something like **3A** below, on the left. Highlight and copy only the cells that have data, as you see in **3B** below at the right:

**3A**

Name	Household Birthdate	SSN	Search Re...	...of Zip or County	Annual In...	Desired B...	Race	Ethnicity	Total Hou...	Identity an...
Vanilla	2	#####	12689926	676	2121	3,946	1	Bedroom Black or A Non-Hisp 2 person(s)		
John Smith	1	1/1/1912	1731-08	419	2452	15,000	2	Bedroom Black or A Non-Hisp 1 person(s)		
Larson	2	#####	12743113	352	2121	3,946	2	Bedroom Black or A Non-Hisp 2 person(s)		
Person A	2	#####	26764444	479	2124	6,214	2	Bedroom Black or A Non-Hisp 2 person(s)		
Person B	2	1/2/1910	14403086	630	2121	13,440	2	Bedroom Black or A Non-Hisp 2 person(s)		
Person C	3	#####	20801925	673	2121	19,200	2	Bedroom Multi-Rac/Hispans 1 person(s)		
Client G	2	#####	14780172	86	2121	6,800	2	Bedroom Black or A Non-Hisp 1 person(s)		
Client X	2	#####	9360-08	86	2121	12,624	2	Bedroom White	Hispans 1 person(s)	
Jack Spratt	1	1/1/1968	11722053	365	2125	4,334	1	Bedroom White	Non-Hisp 1 person(s)	
Alisa Ford	2	#####	12760799	673	2121	2,460	2	Bedroom White	Non-Hisp 2 person(s)	
George B.	3	#####	23840189	366	2119	18,000	3	Bedroom Client Ref/Hispans 1 person(s)		
Donald Tr	1	1/2/1912	14540176	355	2121	20,512	2	Bedroom White	Non-Hisp 1 person(s)	
Maria Rud	2	#####	13680462	294	1301	5,960	2	Bedroom White	Non-Hisp 2 person(s)	
John Bush	2	4/1/1993	7-03-08	614	2368	15,120	2	Bedroom White	Hispans 1 person(s)	
Paul Cruz	4	#####	12624056	1,335	2121	15,960	2	Bedroom White	Non-Hisp 4 person(s)	
Other har	2	#####	14908135	489	2121	13,000	2	Bedroom White	Hispans 1 person(s)	
Second Ho	2	1/6/1962	28053164	348	2121	25,000	2	Bedroom Black or A Non-Hisp 2 person(s)		
Third Ho	3	#####	442	2121		3,400	3	Bedroom Client Doc/Hispans 1 person(s)		

**3B**

Name	Household Birthdate	SSN	Search Re...	...of Zip or County	Annual In...	Desired B...	Race	Ethnicity	Total Hou...	Identity an...
Vanilla	2	#####	12689926	676	2121	3,946	1	Bedroom Black or A Non-Hisp 2 person(s)		
John Smith	1	1/1/1912	1731-08	419	2452	15,000	2	Bedroom Black or A Non-Hisp 1 person(s)		
Larson	2	#####	12743113	352	2121	3,946	2	Bedroom Black or A Non-Hisp 2 person(s)		
Person A	2	#####	26764444	479	2124	6,214	2	Bedroom Black or A Non-Hisp 2 person(s)		
Person B	2	1/2/1910	14403086	630	2121	13,440	2	Bedroom Black or A Non-Hisp 2 person(s)		
Person C	3	#####	20801925	673	2121	19,200	2	Bedroom Multi-Rac/Hispans 1 person(s)		
Client G	2	#####	14780172	86	2121	6,800	2	Bedroom Black or A Non-Hisp 1 person(s)		
Client X	2	#####	9360-08	86	2121	12,624	2	Bedroom White	Hispans 1 person(s)	
Jack Spratt	1	1/1/1968	11722053	365	2125	4,334	1	Bedroom White	Non-Hisp 1 person(s)	
Alisa Ford	2	#####	12760799	673	2121	2,460	2	Bedroom White	Non-Hisp 2 person(s)	
George B.	3	#####	23840189	366	2119	18,000	3	Bedroom Client Ref/Hispans 1 person(s)		
Donald Tr	1	1/2/1912	14540176	355	2121	20,512	2	Bedroom White	Non-Hisp 1 person(s)	
Maria Rud	2	#####	13680462	294	1301	5,960	2	Bedroom White	Non-Hisp 2 person(s)	
John Bush	2	4/1/1993	7-03-08	614	2368	15,120	2	Bedroom White	Hispans 1 person(s)	
Paul Cruz	4	#####	12624056	1,335	2121	15,960	2	Bedroom White	Non-Hisp 4 person(s)	
Other har	2	#####	14908135	489	2121	13,000	2	Bedroom White	Hispans 1 person(s)	
Second ho	2	1/6/1962	28053164	348	2121	25,000	2	Bedroom Black or A Non-Hisp 2 person(s)		
Third ho	3	#####	442	2121		3,400	3	Bedroom Client Doc/Hispans 1 person(s)		

4. Download the **Advocate Reporting Tool** and save it to your desktop:

[www.infoweb.org/HousingAdvocate/AdvocateReporter.xltn](http://www.infoweb.org/HousingAdvocate/AdvocateReporter.xltn)

5. When you first open the Advocate Reporting Tool, you may need to click these two "Security Warning" buttons (these warnings ask you if the sender, HousingWorks, is a trusted source.)

Enable Editing

Enable Content

6. Next, paste the data from step 3b into the tool, in cell A6. Then press the "Profile My Clients" button. When the visual wildness stops, you will have a report ready to print!

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																
2																
3																
4																
5																
6	Name	Household Size	Birth	SSN	Search Re...	...of Zip	County	Annual Income	Desired	Race	Ethnicity	Total Household Size				
7	Client A	1	###	435	2195			9,440	Studio, 1 White	Non-Hispans/Non-1 person(s)						
8	Client E	1	###	452	2195			14,400	1 Bedroom Black or Non-Hispans/Non-1 person(s)							
9	Client C	1	###	481	2195			12,200	1 Bedroom White	Non-Hispans/Non-1 person(s)						
10	Client D	1	###	435	2195			10,164	Studio, 1 Black or Non-Hispans/Non-1 person(s)							
11	Client E	1	###	401	2123			11,440	1 Bedroom Black or Non-Hispans/Non-1 person(s)							
12	Client F	1	###	854	02446			11,694	Studio, 1 Black or Non-Hispans/Non-1 person(s)							
13																
14																

Sign up for a training by faxing this sheet to us: [http://www.infoweb.org/Support/Help\\_Schedule\\_P.pdf](http://www.infoweb.org/Support/Help_Schedule_P.pdf)

## Report on My Clients

<b>(40) Total Number of Households</b>		<b>Ages of HoHs</b>		<b>Household Sizes</b>		<b>Annual Income</b>	
		2	<20	18	1 person	13	<10,000
		11	20's	9	2 persons	9	10-19,999
		7	30's	7	3 persons	6	20-29,999
		7	40's	5	4 persons	6	30-39,999
		5	50's	0	5 persons	1	40-49,999
		2	60's	0	6 persons	1	50-59,999
		2	70's	0	7 persons	1	60-69,999
		3	80's	0	8 persons	1	70-79,999
		1	90's	0	>8 persons	0	80-89,999
		0	18-24 yrs (dupe of E2-3)			0	>90,000
<b>Race</b>							
7	Black, not Hispanic						
3	Black, Hispanic						
2	Asian						
8	White, not Hispanic						
2	White, Hispanic						
13	Hispanic, declined race						
0	Multi-Racial, Hispanic or No						
0	Native Amer / Alaskan						
0	Other						
0	Pacific Isl / Hawaiian						
16	Refused						
<b>Ethnicity</b>							
18	Hispanic/Latino						
22	Non-Hispanic/Non-Latino						
0	Refused						

\*Assumes search is for BR size AND voucher

**Career Stage**

18	Employed
15	Unemployed
7	Retired
0	FT Student
0	Infant or Child in Scho
23	Not Yet Asked

**Desired Bedroom Size\***

0	SRO
1	Studio and 1BR
0	1BR and Fed/State vouchers
1	2BR and Fed/State vouchers
0	3BR and Fed/State vouchers
0	4BR and Fed/State vouchers
0	5BR and Fed/State vouchers
0	6BBR and Fed/State vouchers
0	Loft and Fed/State vouchers

**HoH is a Veteran**

4	Vet
13	No
23	Not Yet Asked

# Report on My Clients



## Average Number of Results

8 Average across all BR Sizes

### 1 Bedroom Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

### 3 Bedroom Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

### 5 Bedroom Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

### Studio Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

### 2 Bedroom Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 1 More than 100 results

### 4 Bedroom Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

### 6 Bedroom Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

### Loft Searches

0 Fewer than 20 results  
 0 21 to 50  
 0 51 to 75  
 0 76 to 100  
 0 More than 100 results

## Explain Inactive Status

0 Not applicable - still active  
 0 Unknown or Disappeared  
 0 Housed with no rental assistance  
 0 Housed with a permanent voucher  
 0 Housed with temporary assistance  
 1 Deceased  
 0 Incarcerated

## Active, Length of Time Assisted

38 1 month or less  
 0 2-6 months  
 0 7-12 months  
 1 13-18 months  
 0 19-24 months  
 0 More than 24 months

## Inactive, Length of Time Assisted

1 1 month or less  
 0 2-6 months  
 0 7-12 months  
 0 13-18 months  
 0 19-24 months  
 0 More than 24 months