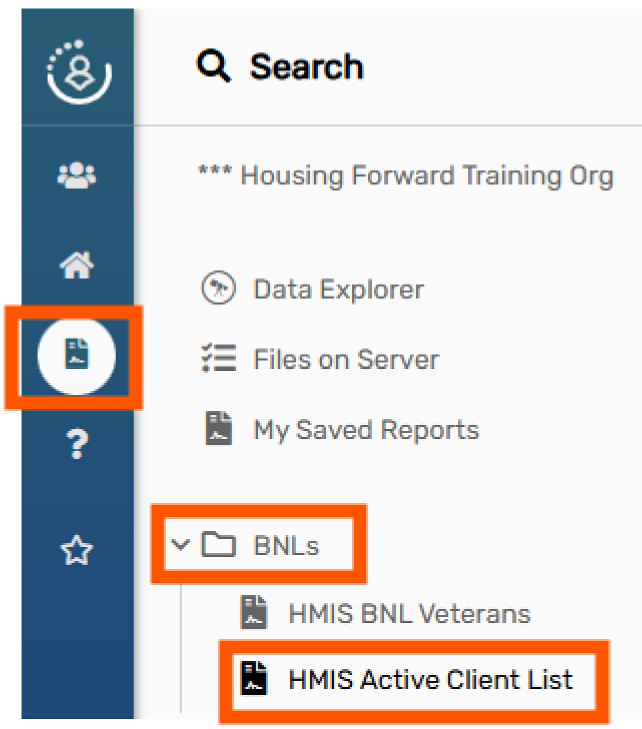
Active Client List Report (By Name List)

Introduction

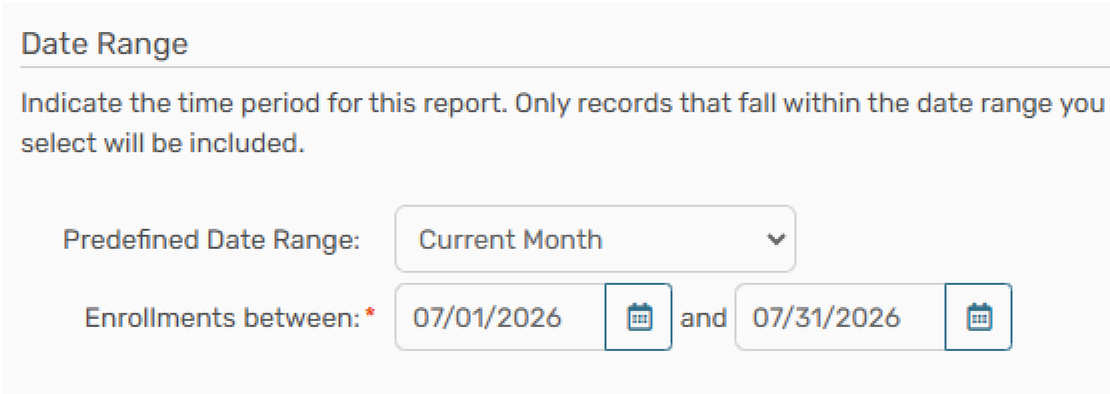
This guide displays how to generate a By Name List (BNL) Report for Active Clients during certain periods of their enrollment into a program. This report can be used to view your clients that are actively enrolled in a program, when they began their enrollment and when they exited at any time during the program. With the exported BNL report, you will also be able to discover if a client is missing any data elements that may affect other reports.

Running the Report

1. Log in to ClientTrack and navigate to your **Reports workspace**. In the menu on the left, click **BNLs** then select **HMIS Active Client List**.



2. For the Date Range, select the time period for your report.



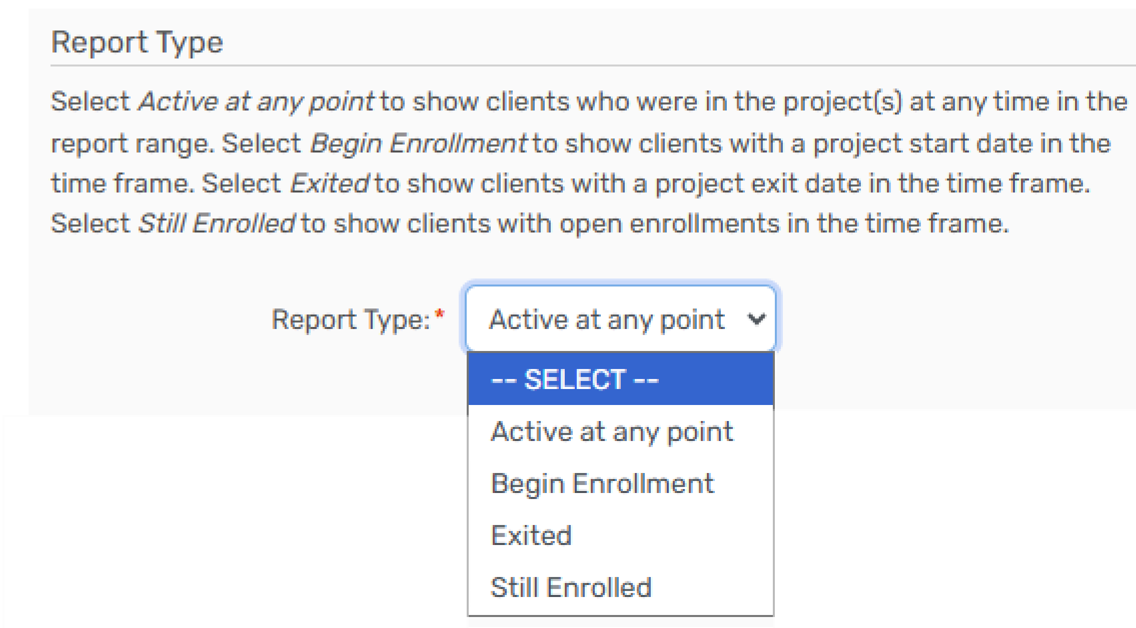
Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month

Enrollments between:* 07/01/2026 and 07/31/2026

3. For Report Type, select **your choice** from the drop down menu.



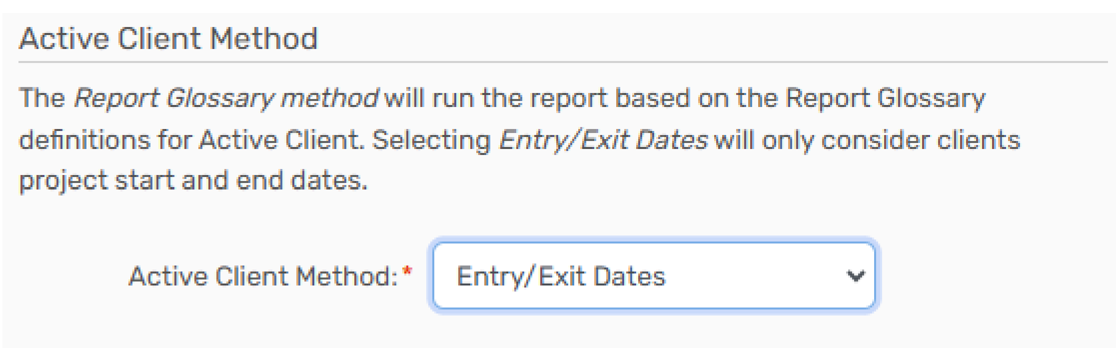
Report Type

Select *Active at any point* to show clients who were in the project(s) at any time in the report range. Select *Begin Enrollment* to show clients with a project start date in the time frame. Select *Exited* to show clients with a project exit date in the time frame. Select *Still Enrolled* to show clients with open enrollments in the time frame.

Report Type:* Active at any point

-- SELECT --
Active at any point
Begin Enrollment
Exited
Still Enrolled

4. For Active Client Method, select **Entry/Exit Dates** from the drop down menu.

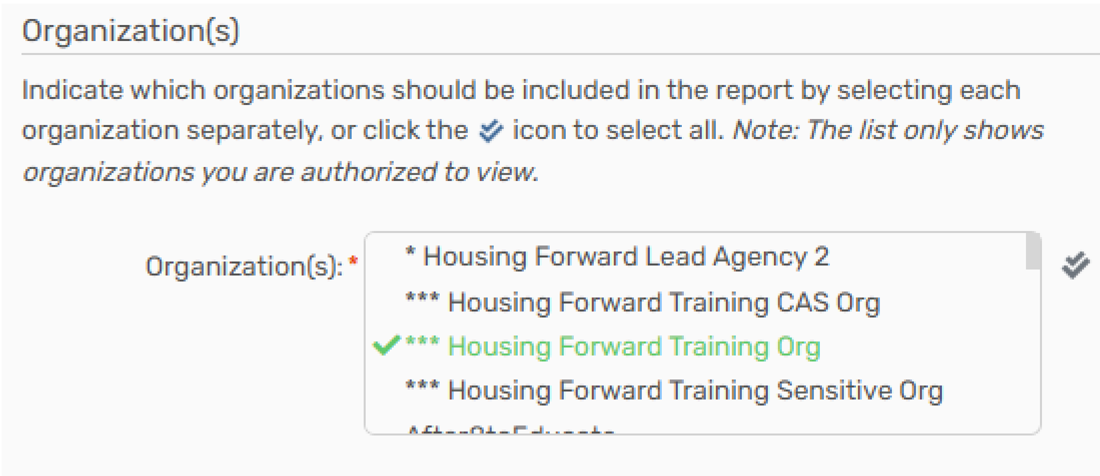


Active Client Method

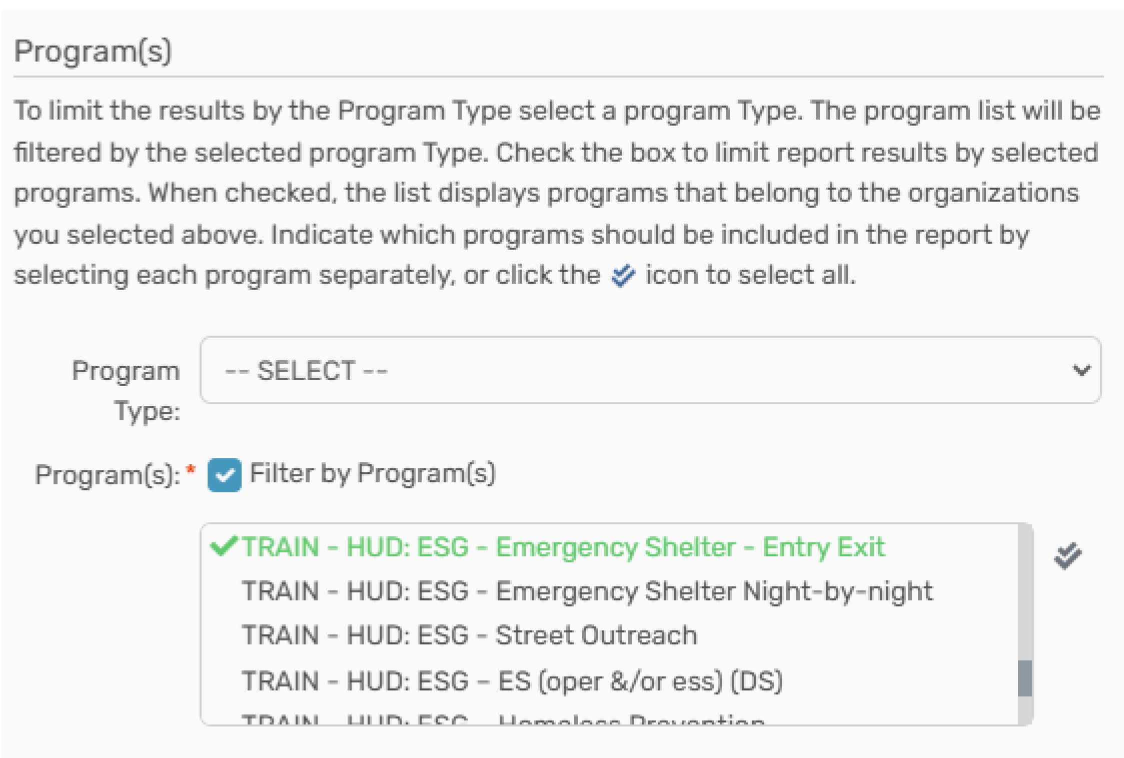
The *Report Glossary method* will run the report based on the Report Glossary definitions for Active Client. Selecting *Entry/Exit Dates* will only consider clients project start and end dates.

Active Client Method:* Entry/Exit Dates

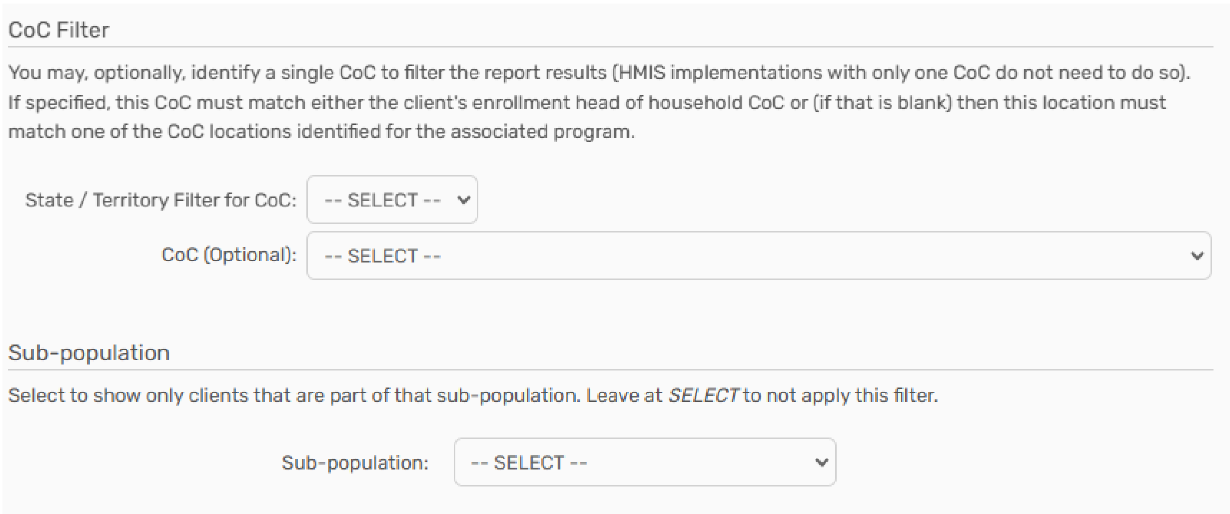
5. Confirm that your Organization has defaulted to select **your agency**.



6. Check the box for **Filter by Programs** and **select one program** to run the report for. This report should be run for individual programs one at a time.



7. Leave the CoC Filter and Sub-population fields **empty**.



CoC Filter

You may, optionally, identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so). If specified, this CoC must match either the client's enrollment head of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.

State / Territory Filter for CoC: -- SELECT --

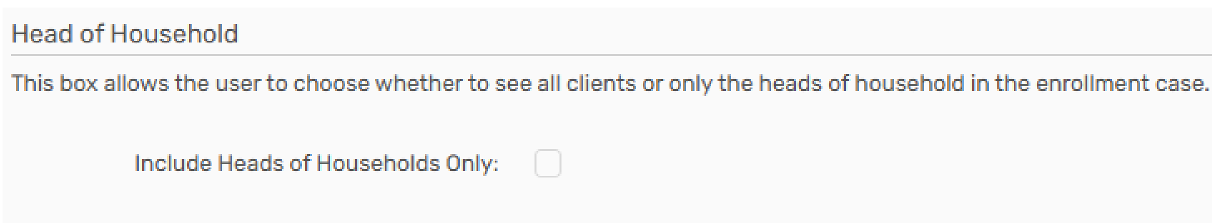
CoC (Optional): -- SELECT --

Sub-population

Select to show only clients that are part of that sub-population. Leave at *SELECT* to not apply this filter.

Sub-population: -- SELECT --

8. For Head of Household, check the box for Include Heads of Households Only, unless you would like all members of a family to appear.

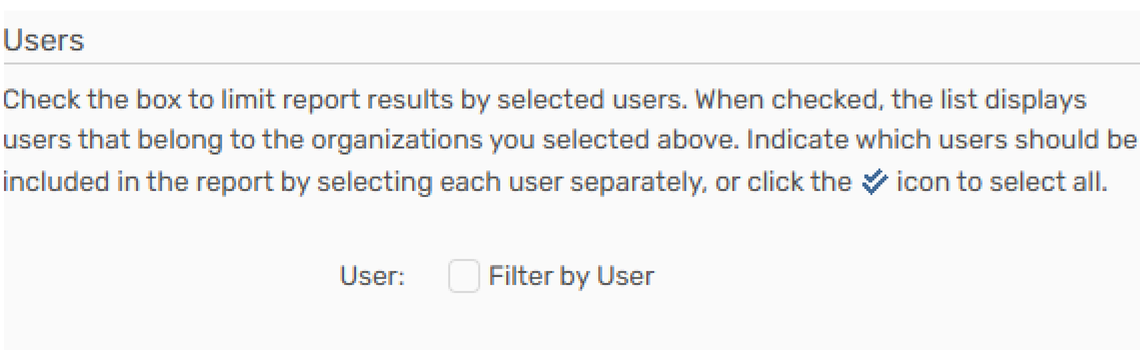


Head of Household

This box allows the user to choose whether to see all clients or only the heads of household in the enrollment case.

Include Heads of Households Only:

9. For Users, leave the Filter by User box **empty** (do NOT check).

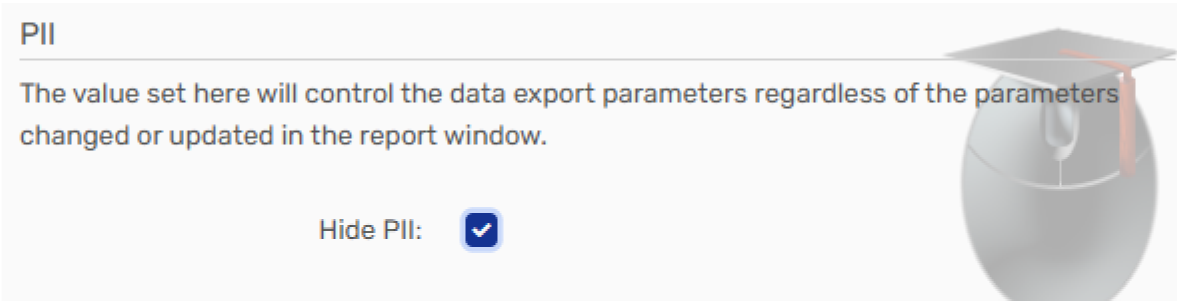


Users

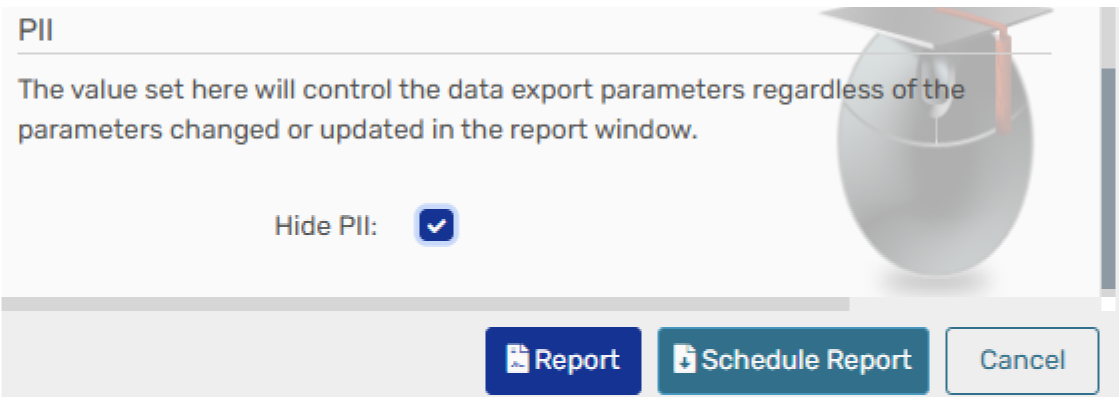
Check the box to limit report results by selected users. When checked, the list displays users that belong to the organizations you selected above. Indicate which users should be included in the report by selecting each user separately, or click the ✔ icon to select all.

User: Filter by User

10. For PII, **check the box to Hide PII.**
NOTE: This step is *extremely* important to protect your clients' information.



11. Click **Report** to see the report in real time or click Schedule Report to have the report run automatically at a later time.



Reading the Report

Housing programs can use this report to easily analyze Housing Move-In Dates for clients in their program, without having to queue and wait on an APR or CAPER.