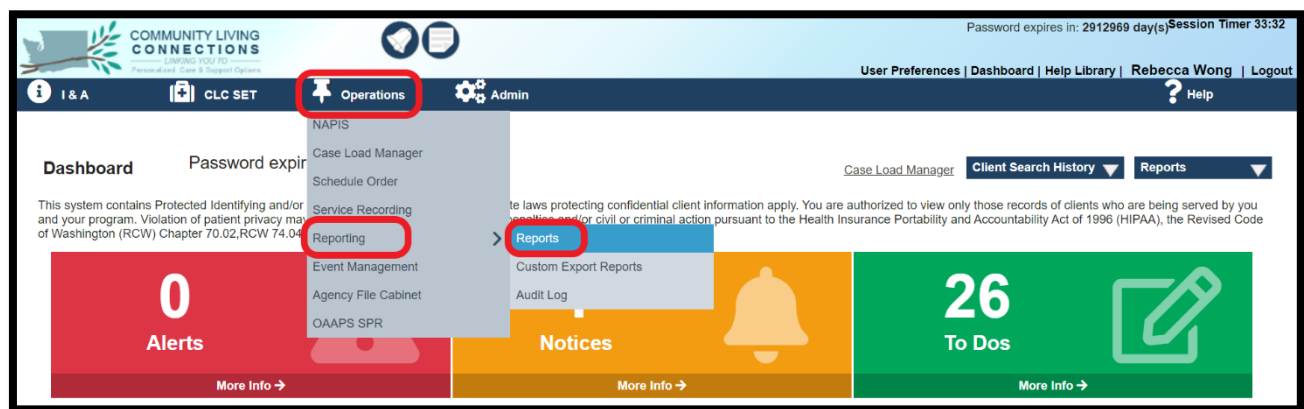


## Running Report - 1.1.4 Agency Unit Summary – Non-Registered Report

This guide shows how to run “1.1.4 Agency Unit Summary – Non-Registered Report.” This pre-built report shows the units and client totals (newly enrolled and monthly clients served) of non-registered/aggregate services for a selected month.

1. To get your report, hover over the “Operations” tab, then go down to “Reporting” and click “Reports.”



2. On the left-hand side, select “Service Recording Reports,” then click on “1.1.4 Agency Unit Summary – Non-Registered Report.”

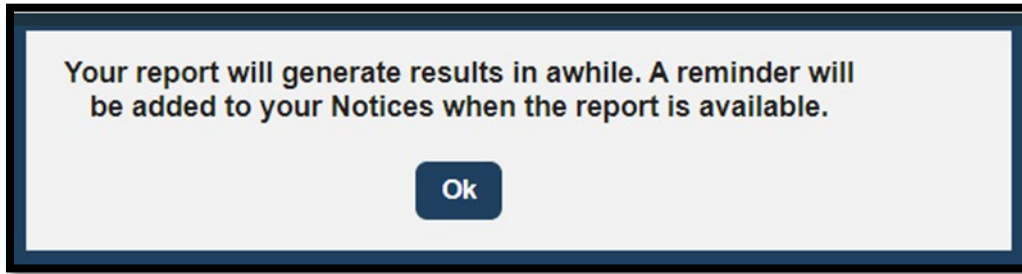


### 3. Once you click on the report, the search page will open. Fill out the following fields:

- From: first date of the month you wish to run the report
- To: last day of the month you wish to run the report  
(Example: If you want to run report for July 2025, enter the dates 07/01/2025 for “From” and 7/31/2025 for “To”)
- Provider: your agency
- Scope of Work: optional – select all your services or leave it blank (If you leave it blank, the system will select every service your agency provides)
- Site: select site if your agency has multiple sites, otherwise, leave it blank

- Check the box “Received more than 0 units.” Click on “Run Report” twice.

4. This pop-up will appear, click “OK” to generate the report.

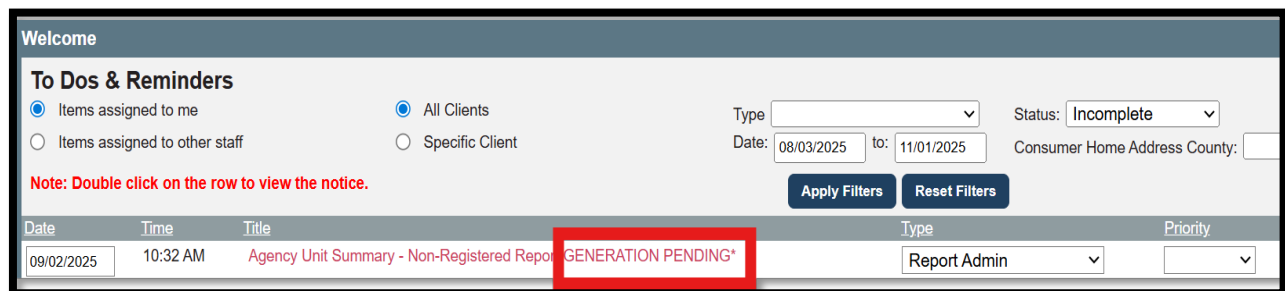


5. Go to “Dashboard” to view the report.



6. If it says, “Generation Pending,” the report is still loading.

Wait a minute or two, then click the “Dashboard” again to refresh the page.



7. Once the report is complete, it will say “Generation.” Click on “Download Report” to view the report.

This will be saved in your computer’s downloads folder.

