DATA QUALITY 201
TRAINING FOR COC AND ESG FUNDED PROVIDERS AND OTHER HMIS USERS

Department of Community and Economic Development (DCED)

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Agenda

1. Duplicated Clients
2. Housing Move-In Date Data Check Report
3. HMIS Active Client List Report
4. CAPER / APR – CAPER / APR Review
5. Annual Assessment Data Check Report
6. Client Income Summary Report
7. Tips & Tricks
8. Help Tickets
9. Questions
10. Contact Info.

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Duplicate clients:

- How to avoid duplicate clients.
- How to run the report to identify duplicate clients.
- How to use the report.

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How to avoid duplicates:

- Always search HMIS for records to see if the Client has existing Client ID before creating a new one.
- To look for duplicates, narrow your search by using basic client information.
- You can also run the Duplicated Clients report.

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How to run a Duplicated Clients Report

1. Navigate to Report workspace.
2. Open Client Reports folder.
3. Select Duplicated Clients.
4. Choose the organization you are running the report for.
5. Check boxes to select the filters you would like to use. By choosing more filters the results will be more specific and generate fewer results.
6. Click Report.

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<u>Housing Move-In Date Data Check Report</u>

- **How to Run the report.**
- **How to read the report.**
- **How to use for HMIS.**

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Housing Move-In Date Data Check Report:

1. Navigate to the Reports Workspace.
2. Click on Other reports
3. Scroll down to, “Housing Move-In Date Data Check Report”.
4. Click on the Report and fill in the setup form.
5. Click Report

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How to Read the report

Housing Move-In Date for PH Data Check Report

From this menu you can export data to PDF and to Excel

Housing Move-In Date for Permanent Housing Projects

9/1/2022 to 9/30/2022

Household	Client (Head of Household)	HH Size	Enroll Date	Exit Date	In Permanent Housing Unit	Housing Move-In Date
DCED CoC RR (Rapid Rehousing) Program						
[redacted]	[redacted]	[redacted]	[redacted]		[redacted]	
Client, test25 Household	Client, test25[redacted]	9	9/14/2022		Yes	9/14/2022
Client, test46 Household	Client, test47[redacted]	3	9/16/2022		Yes	9/16/2022
[redacted]	[redacted]	[redacted]	[redacted]		[redacted]	
[redacted]	[redacted]	[redacted]	[redacted]		[redacted]	
Total Households: 5			In Permanent Housing:		40 %	

ClientTrack™ Reports

[redacted]

These headings give you information about household.

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How to identify who needs a move-in date and when it needs to be entered in HMIS:

Housing move in dates are applicable to all Permanent Housing components. The housing move-in date must be on or after the project start date and before the project exit date.

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How to change or add move-in date in HMIS:

1. Find the client through Find Client function in the Client workspace.
2. Client dashboard will appear, scroll down to client's enrollments.
3. Through ellipsis (…) select, EDIT ENROLLMENT.
4. Under the HMIS Enrollment, scroll down, you will see the "household" heading under that heading by scrolling to the right you will see Housing move in date.
5. You can change, edit the date there.
6. Click Save.

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HMIS Active Client List:

- **How to run report.**
- **How to read report.**
- **How to use for HMIS.**

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HMIS Active Client List:

Run this report to see if:

- **Enrollment is correct**
- **Exit destinations correct**
- **Income is correct**
- **Basic Client information is correct**

1. Navigate to Reporting workspace.
2. Select BNL (By Name List) Folder.
3. Select HMIS Active Client List.
4. Choose date range
5. Under report type, choose the option you would like data about for the time period.
6. Under Active Client Method choose either "Report Glossary Active Client" for active clients or choose "Entry/Exit dates".

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HMIS Active Client List

7. Select your organization.
8. Select your project.
9. All other filters are not mandatory, if you want to fill the filters you can, but if not, this will not affect your report. The more filters you choose the narrower range your report will have.
10. Select Report.

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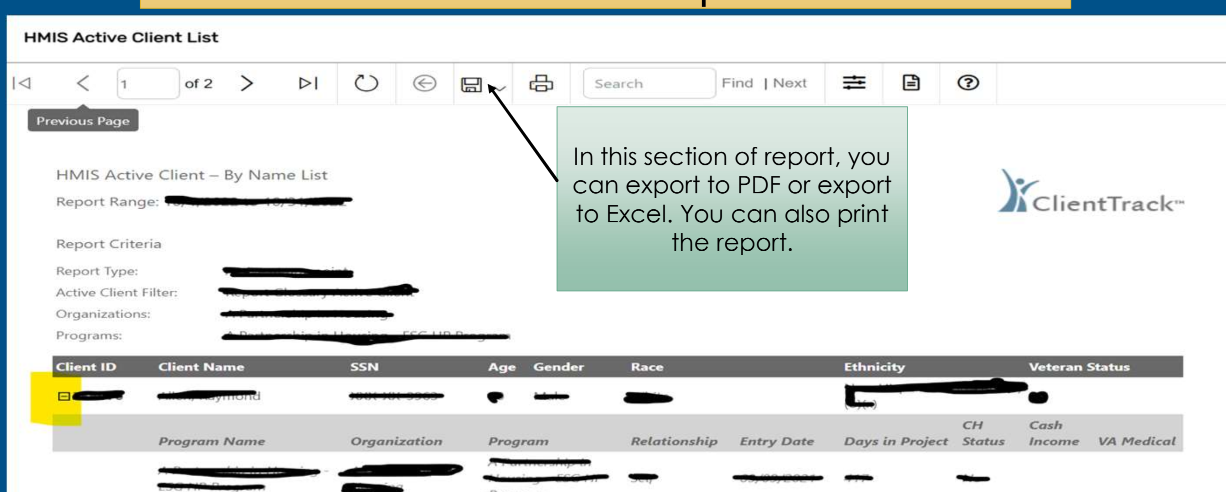
HMIS Active Client List. how to read report:



In this section of report, you can export to PDF or export to Excel. You can also print the report.

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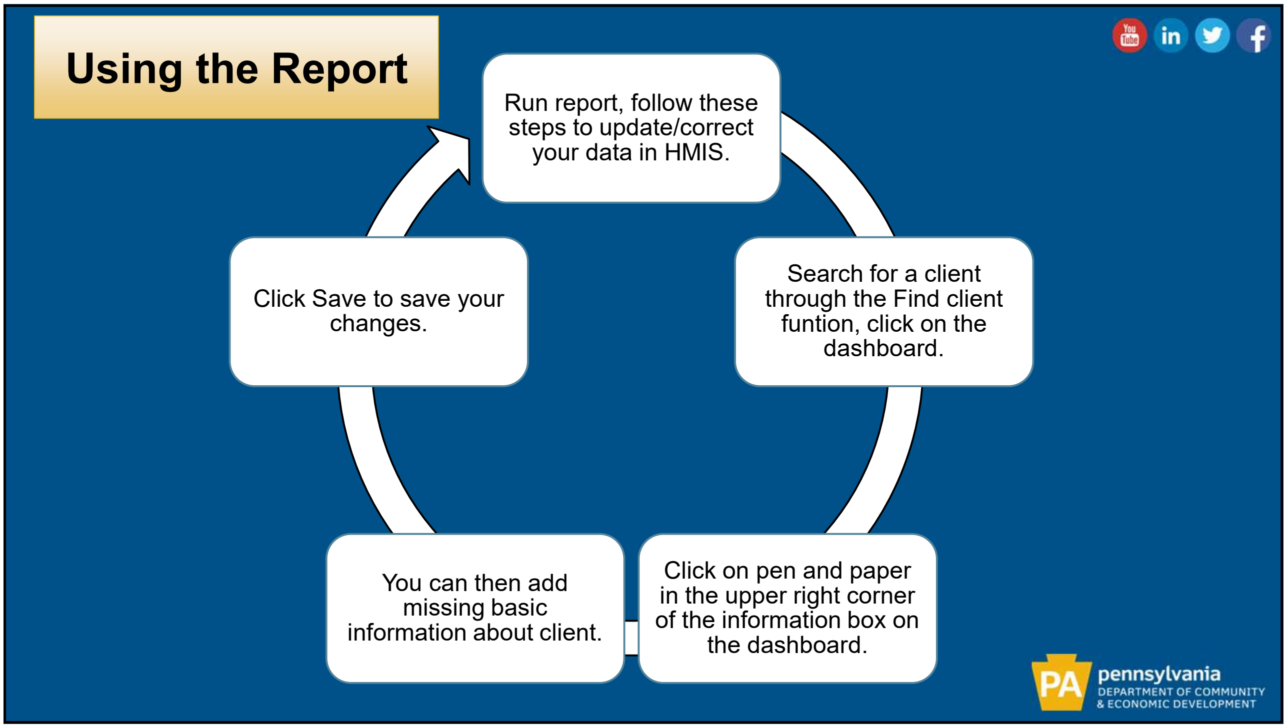
Using the Report
Run report, follow these steps to update/correct your data in HMIS.
Search for a client through the Find client funtion, click on the dashboard.
Click on pen and paper in the upper right corner of the information box on the dashboard.
You can then add missing basic information about client.
Click Save to save your changes.
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<u>HMIS EXPORT: CAPER/APR:</u>

- **How to Run.**
- **How to read.**
- **Review through excel.**

<u>APR/ CAPER Review</u>

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How to run CAPER / APR:

1. Select Reports workspace.
2. Select “HMIS Exports”. Inside this folder you will find CSV CAPER 2022 and CSV APR 2022. Select the appropriate report.
3. Select Date, Organization, and Project.
4. Leave Generate Validation File box checked.
5. Click Run Export.

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Export Encryption Box:

1. Uncheck the box marked Encrypt Export.
2. Check box for Include Header Row in CSV File(s):
3. Check box for Always Quote CSV Values(s):
4. Check box for I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within.
5. When the box that says, Your export has been queued and will be processed at the next available time appears, click okay.
6. Your Report will show on the Files on Server when done.

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Validation files:
- Detailed data that shows PII
- Can be used for data quality
- Pit Questions will show if they were enrolled during those Pit count days.

How to read CAPER/APR: CAPER/APR reports downloaded into two form of files:
1. Validation
2. Export

Export files:
- Are what you load into SAGE
- Contain only aggregate data
- Do not open this file if you are planning on uploading it

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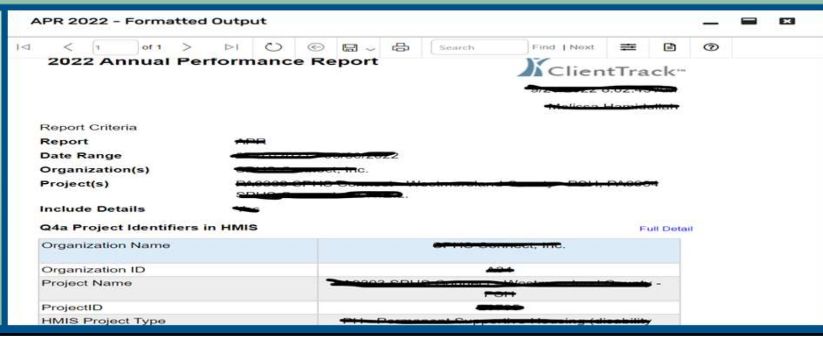
APR/CAPER review:

1. Navigate to the Reports workspace.
2. Open the HMIS Exports folder.
3. Select APR/ CAPER review.
4. Through Ellipsis select " View 2022 Report".

Each table has specific information related to client, organization, and project.



APR 2022 – Formatted Output

2022 Annual Performance Report

ClientTrack

[redacted]

Report Criteria

Report	[redacted]
Date Range	[redacted]
Organization(s)	[redacted]
Project(s)	[redacted]
Include Details	[redacted]

Q4a Project Identifiers in HMIS — Full Detail

Organization Name	[redacted]
Organization ID	[redacted]
Project Name	[redacted]
ProjectID	[redacted]
HMIS Project Type	[redacted]

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Reports:

Annual Assessment data check.

- **How to run report.**
- **How to read report.**
- **How to use for HMIS.**

Client income summary report.

- **How to run report.**
- **How to read report.**
- **How to use for HMIS.**

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Annual Assessment Data Check Report:

1. Select Reports workspace, choose "Other Reports" file.
2. Select "Annual Assessment Data Check" report.
3. Select your COC, organization and project(s).
4. Click "Report" to run the report.

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Annual Assessment Data Check report: How to read report:


Annual Assessment Data Check Report

Annual Assessment Data Check Report
9/1/2022 to 9/30/2022

Client (ID)	Current Age	Relationship	Enroll Date	Exit Date	Annual Anniversary (Allowed Range)*	Last Annual Assessment	Annual Data Check	Last Annual Financial	Annual Financial Data Check
DCED CoC RR (Rapid Rehousing) Program				PH – Rapid Re-Housing					
client, test18									
client, test-orange (279555)	12	Son	8/24/2022		N/A		NOT REQUIRED		NOT REQUIRED
client, test18 (279566)	28	Other Family Member	8/24/2022				NOT REQUIRED		NOT REQUIRED
client, test19 (279567)	36	Other Family Member	8/24/2022				NOT REQUIRED		NOT REQUIRED
Client, test25									
Client, test25 (279603)	46	Self	9/14/2022		09/14/2023* (08/15/2023 - 10/14/2023)*		NOT REQUIRED		NOT REQUIRED
Client, test28 (279606)	5	Daughter	9/15/2022		N/A		NOT REQUIRED		NOT REQUIRED
Client, Test31 (279610)	29	Son	9/15/2022	9/16/2022	N/A		NOT REQUIRED		NOT REQUIRED
client, test34 (279613)	24	Son	9/15/2022		09/14/2023* (08/15/2023 - 10/14/2023)*		NOT REQUIRED		NOT REQUIRED
Client, test36 (279616)	28	Son	9/15/2022	9/16/2022	N/A		NOT REQUIRED		NOT REQUIRED
test, Client50									
test, Client50 (279732)	25	Self	9/1/2022		09/01/2023* (08/02/2023 - 10/01/2023)*		NOT REQUIRED		NOT REQUIRED
test, Client51 (279733)	13	Son	9/1/2022		N/A		NOT REQUIRED		NOT REQUIRED
test, Client53									
test, Client53 (279734)	37	Self	9/1/2021		09/01/2022 (08/02/2022 - 10/01/2022)	9/14/2022	PASSED	9/14/2022	PASSED
test, Client54 (279735)	34	Spouse	9/1/2021		09/01/2022 (08/02/2022 - 10/01/2022)	9/14/2022	PASSED	9/14/2022	PASSED
test, Client55									
test, Client55 (279738)	43	Self	10/24/2021		10/24/2022* (09/24/2022 - 11/23/2022)*		NOT REQUIRED		NOT REQUIRED
test, Client56 (279739)	10	Daughter	10/24/2021		N/A		NOT REQUIRED		NOT REQUIRED
Total Clients: 24		**Requiring Annual Assessment: 2**							

Annual anniversary (allowed range): conducted for 60 days which includes 30 before annual assessment date and 30 days after annual assessment dates
Last annual assessment: the date when last annual assessment is completed.
Annual data check: pass, fail, missing or not required.
Last annual financial: the date when last annual financial assessment was completed

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Using the Annual Assessment Data Check Report

- Login to client track, search for client, select the client record
- Use the ellipsis menu next to the enrollment to select Update/Annual Assessment
- On the program enrollment page verify the information then click Save or No Changes
- Choose New Annual Assessment
- Complete the Assessment

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Client Income Summary Report:

1. Select the Reports workspace and choose the Other Reports file.
2. Select "Income Summary Report".
3. Enter Date Range, CoC and organization
4. Select Program(s)
5. Click "Report" to run the report.

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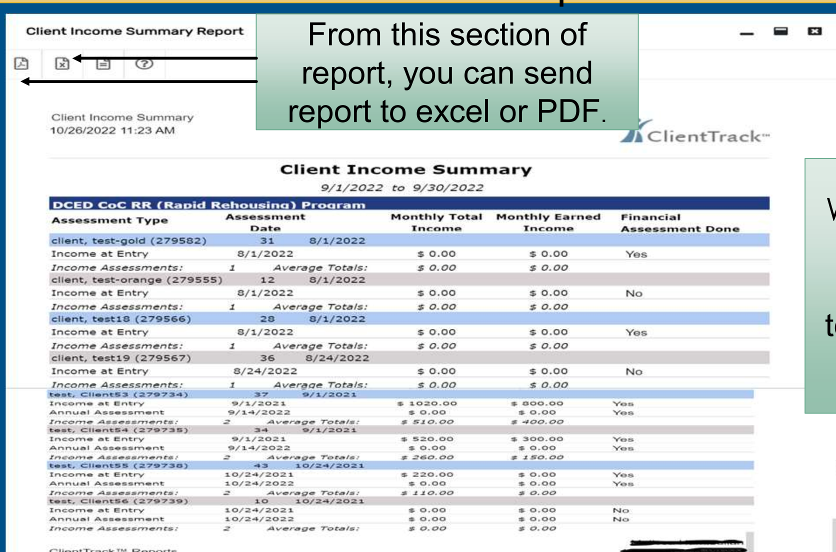
Client Income Summary Report: How to read report:


Client Income Summary Report

Client Income Summary
10/26/2022 11:23 AM

ClientTrack™

Client Income Summary

9/1/2022 to 9/30/2022

DCED CoC RR (Rapid Rehousing) Program

Assessment Type	Assessment Date		Monthly Total Income	Monthly Earned Income	Financial Assessment Done
client, test-gold (279582)	31	8/1/2022			
Income at Entry	8/1/2022		$ 0.00	$ 0.00	Yes
Income Assessments:	*1*	*Average Totals:*	*$ 0.00*	*$ 0.00*	
client, test-orange (279555)	12	8/1/2022			
Income at Entry	8/1/2022		$ 0.00	$ 0.00	No
Income Assessments:	*1*	*Average Totals:*	*$ 0.00*	*$ 0.00*	
client, test18 (279566)	28	8/1/2022			
Income at Entry	8/1/2022		$ 0.00	$ 0.00	Yes
Income Assessments:	*1*	*Average Totals:*	*$ 0.00*	*$ 0.00*	
client, test19 (279567)	36	8/24/2022			
Income at Entry	8/24/2022		$ 0.00	$ 0.00	No
Income Assessments:	*1*	*Average Totals:*	*$ 0.00*	*$ 0.00*	
test, Client53 (279734)	37	9/1/2021			
Income at Entry	9/1/2021		$ 1020.00	$ 800.00	Yes
Annual Assessment	9/14/2022		$ 0.00	$ 0.00	Yes
Income Assessments:	*2*	*Average Totals:*	*$ 510.00*	*$ 400.00*	
test, Client54 (279735)	34	9/1/2021			
Income at Entry	9/1/2021		$ 520.00	$ 300.00	Yes
Annual Assessment	9/14/2022		$ 0.00	$ 0.00	Yes
Income Assessments:	*2*	*Average Totals:*	*$ 260.00*	*$ 150.00*	
test, Client55 (279738)	43	10/24/2021			
Income at Entry	10/24/2021		$ 220.00	$ 0.00	Yes
Annual Assessment	10/24/2022		$ 0.00	$ 0.00	Yes
Income Assessments:	*2*	*Average Totals:*	*$ 110.00*	*$ 0.00*	
test, Client56 (279739)	10	10/24/2021			
Income at Entry	10/24/2021		$ 0.00	$ 0.00	No
Annual Assessment	10/24/2022		$ 0.00	$ 0.00	No
Income Assessments:	*2*	*Average Totals:*	*$ 0.00*	*$ 0.00*	

ClientTrack™ Reports [redacted]

From this section of report, you can send report to excel or PDF.

Within your report frame, you will find complete updates about monthly total income and monthly earned income

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Using the Income Summary Report

Search client through Find client.

Click on the Client record to go to the client dashboard

Using the ellipsis menu next to the enrollment select Associated Assessments

Use the ellipsis menu next to the correct master assessment and select Review detailed assessment

Once on the Assessment Status page you can select the Financial Assessment and update or complete it

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- **Tips on avoiding inputting incorrect information.**
- **How to correct Basic client information in HMIS.**

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Inputting Incorrect information:

- Never assume based on the look of a client or what you know about the client and answer the question for the client in HMIS.
- Always allow the client to decide what data goes into HMIS.
- HUD has provided Client doesn't know and Client Refused options for scenarios where the client is not ready to or does not want to answer.
- A case manager can go back and add new information to the workflow by going through the ellipsis menu next the client's enrollment on their dashboard.

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How to update/fix the incorrect information in HMIS

1. Search for the client from client workspace through Find client.
2. Click on dashboard.
3. Dashboard will give you client profile.
4. Click on “pen and paper” icon on the profile of client, from there you can edit or change the information.
5. Scroll down, you will see service (pen and paper icon) and programs enrollments, by clicking on ellipses, you can edit or change information of client.
6. Click Save to save the changes.

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Help Tickets

1. **How to submit**
2. **Tips for submitting**
3. **Managing a submitted ticket**

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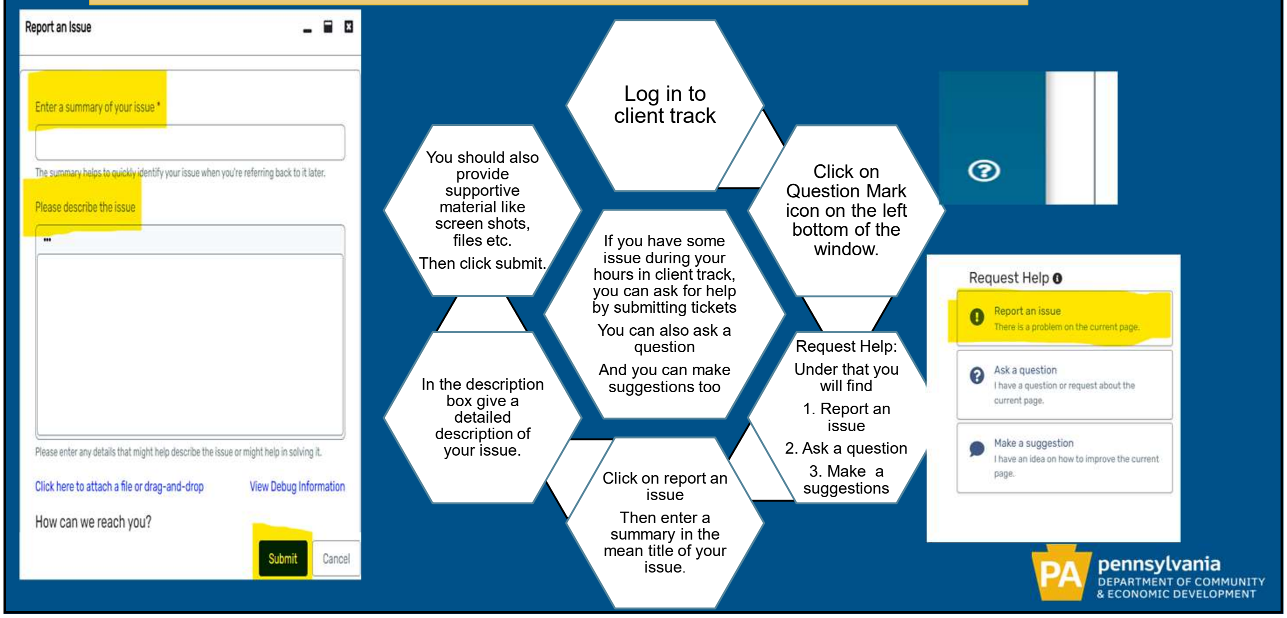
How to submit a Help ticket



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Tips for submitting a Help ticket

- Submit ticket from location you are experiencing the difficulty
- Add Client ID, your organization, your workgroup
- Detailed description of the issue
- Upload screenshots of error codes, missing data, reports and anything else that will help identify the issue
- Before clicking submit re-read your ticket and ask yourself, “Can another person read this and understand what is being described?”

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Managing a ticket

- To find the status of your ticket: Home workspace>My ClientTrack folder>My Submitted Issues
- Once in My Submitted Issues you can see all your submitted issues and sort them by Assigned, Closed, Fixed Verify Needed, New, and Waiting for Response
- By clicking on the pencil and paper icon next to the issue number you can open the ticket and read or leave a note.

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**Contact information:
If you have any questions or any suggestions, please contact us:**

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