Data Literacy Institute
How to Request Data

Nov 7, 2018

Santa Clara County Continuum of Care

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Data Literacy Institute

The goal of the Data Literacy Institute is to help staff at all levels enhance their understanding of the data collected in HMIS, how to measure program performance, and how to use data to effectively communicate the success of your programs.

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Agenda

- Monitoring your own data
- Beyond your own data
- Requesting data

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What information are you interested in?

What information are you interested in?

Client Level:

What does my caseload look like in HMIS? What are the outcomes for my clients? Is my HMIS data up-to-date (does HMIS reflect the client's situation and services provided)?

Program Level:

What are the outcomes for my program? Is the program meeting contracted goals?

Agency Level:

What are the outcomes for my agency's programs? How do they compare to the rest of Santa Clara County? How do they compare to each other?

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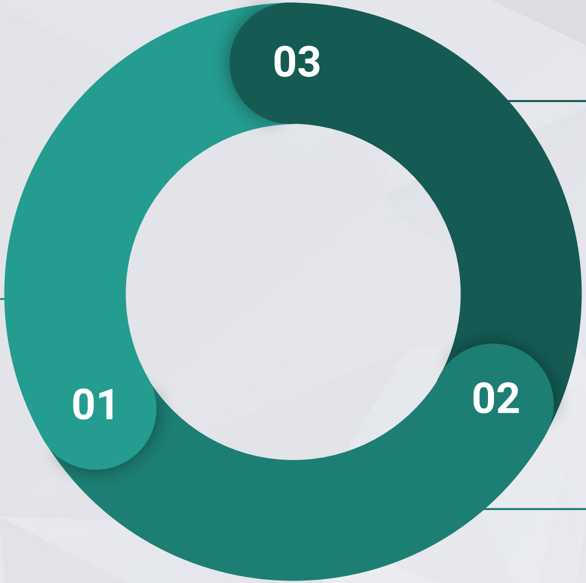
Monitoring Your Own Data

How to be a Good Data Partner

What does it mean to be a good data partner?



01 — Understand the importance of data collected to your agency and to Santa Clara County

02 — Understand what data needs to be collected, what it means, and when/how it should be entered

03 — Active participant in the data collection and monitoring process

Your HMIS Data Matters!

Almost every piece of information collected in HMIS is important for reporting on a Federal or County level

Information is used to monitor how effective County and nationals efforts are in ending homelessness

Information in HMIS has a large impact on funding for housing services in Santa Clara County

Your work matters!

Understanding Data Collection Processes

Agency/Program Requirements

Your agency may need to track additional information for internal reporting or for other funders (e.g. foundations).

Santa Clara County Requirements

Some programs have specific workflow requirements. Examples: Coordinated Assessment, Rapid Rehousing, CCP

HMIS Data Standards

Core set of questions that are required by HUD and other federal funders (e.g. VA, PATH, RHY, HOPWA). How to answer each question is defined in the Data Manual

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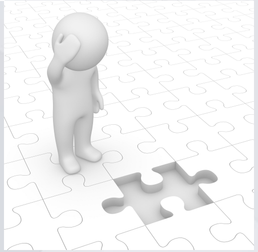
Monitoring Data Quality

__Timeliness__

Be aware of guidelines for how quickly data should be entered into the system from its collection date



__Data Completeness__

Be aware of standards for “Don’t Know” and “Refused” rates - only use these options when necessary

__Accuracy__

Regularly review your data for to make sure it reflects the client’s real life situation

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Recommended Timelines

Ongoing: enter data into HMIS as soon as you can:

- Enroll/exit a client within 3 working days
- For shelters that use nightly check-ins or for outreach programs that are contacting clients - enter check-in / contact service within 1 working day

Every 2 weeks:

- Run the **Program Roster report** to check if client entries and exits are accurate

Every month:

- Run the **HMIS Data Quality report** to check for data quality issues
- Review any data issues flagged by your Agency Administrator

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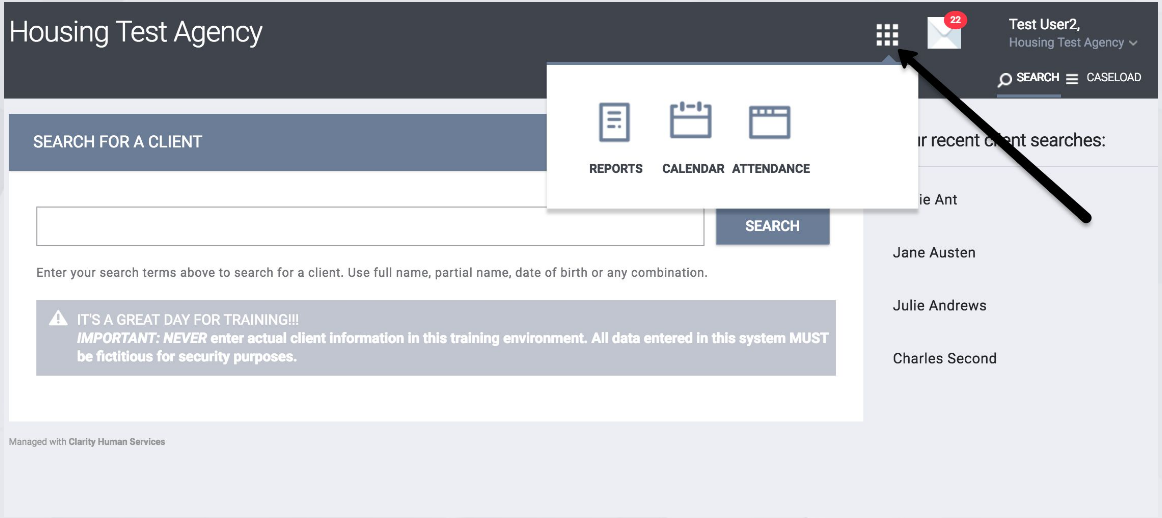
Using the Report Library

- The Report Library is available to all HMIS users
- Find it by clicking the Launcher, and clicking the “Reports” icon



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Program Roster Report

- Report Name:
  - [GNRL-106] Program Details Report
- Where to find it:
  - Program-Based Reports folder
- Useful for:
  - Client-level information
  - At a glance look at the clients enrolled in your program
  - Household reviews
  - Housing Move-In Date
- Tips / Notes:
  - Run the report for just one day (today's date) to get a snapshot of who is currently active in your program

Using Program Roster to Review Households

Households are separated by lines on the report:

- If you notice that clients are missing, add them to the household.
- If clients should be grouped together, contact the Help Desk
- If clients have exited but there is no Exit Date, exit them

Program Roster Report

Sample report - test client data

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Enrolled within [06/01/2017 - 11/30/2017]

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Assess-ments	Services	Assigned Staff
Program: Baltimore Emergency Shelter										
Larina, Tanya	128CB485D	10/11/1958	58	59	06/01/2017	07/01/2017	30	0	2	A. Admin
Katya, Ivanove	54F117E34	10/11/1987	29	30	06/06/2017	06/08/2017	2	0	1	A. Admin
Katya, Ivanove	54F117E34	10/11/1987	29	30	09/01/2017	09/01/2017	0	2	0	A. Admin
Gnatenko, Tatyana	CE74C00E6	12/11/1948	68	68	06/01/2017	06/13/2017	12	0	1	A. Admin
Gnatenko, Lena	86890AD3B	12/10/1958	58	58	06/01/2017	06/01/2017	0	0	0	A. Admin
Gnatenko, Ivar	F2A73252C	10/10/1948	68	69	06/01/2017	06/01/2017	0	0	0	A. Admin
Rick, Ilona	379D9DA8B	12/10/1958	58	58	06/01/2017	06/01/2017	0	0	0	A. Admin
Rick, Lisa	5F6EA0FE1	12/11/1928	88	88	06/01/2017	06/13/2017	12	0	1	A. Admin
Rick, Ostap	2CC316F74	10/10/1928	88	89	06/01/2017	06/01/2017	0	0	0	A. Admin
Katya, Ivanove	54F117E34	10/11/1987	30	30	10/24/2017	10/24/2017	0	0	0	A. Admin
McFly, Lorraine	F0FDDF0C9	05/09/1952	65	65	07/13/2017	07/13/2017	0	0	0	A. Admin
McFly, George	066D45587	10/01/1950	66	67	07/13/2017	07/13/2017	0	0	0	A. Admin
Katerinka, Alson	D91FEB7E8	10/10/1980	36	37	07/01/2017	07/01/2017	0	0	0	A. Admin
Kate, Alson	07D7D9F73	-	-	-	07/01/2017	07/01/2017	0	0	0	A. Admin
Katya, Testscreen	06C75DF7D	10/11/1987	29	30	08/02/2017	08/02/2017	0	0	0	A. Admin
Ivanova, Katya	94DD95487	10/01/1985	31	32	06/01/2017	06/01/2017	0	0	0	A. Admin
Katya, Testemailtemplates	8DCE26718	10/11/1987	29	30	06/01/2017	06/01/2017	0	0	0	A. Admin
Kate, Alson	07D7D9F73	-	-	-	11/10/2017	-	20	0	0	A. Admin
Mouser, Michael	F08851A1B	10/10/1985	32	32	11/15/2017	-	15	0	0	M. Shaw
Mouser, Micky	A4588D705	02/25/2013	4	4	11/15/2017	11/16/2017	1	0	0	M. Shaw

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Using Program Roster to Review Housing Move-In Date

For PSH and RRH programs, check the Housing Move-In Date

- If household moved into housing and the Housing Move-In Date is “undefined”, the Housing Move-In Date needs to be added
- If the Housing Move-In date is not accurate (e.g. is before the program start date), it should be updated

Program Roster Report

Jenn Test Agency
Active within [05/01/2017 - 05/02/2018]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, [ ] = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: EAP Demo Program											
Kitty, Hello	1C8A64AFD	01/01/1980	37	38	07/01/2017	-	306		0	3	J. Ong
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	07/01/2017	-	306		0	1	J. Test5
Program: Jenn Test HP Prevention Program											
Potato, Hot	BE2456D1C	01/01/1980	38	38	01/02/2018	-	121		0	1	J. Ong
Program: RRH											
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	11/01/2015	-	914	undefined	0	0	J. Ong
Cotta, Ri	3B830C101	01/01/2010	5	8	11/01/2015	-	914	undefined	0	0	J. Ong
Tea, Ginger	53020163C	02/01/2015	0	3	11/05/2015	-	910	undefined	0	0	O. Jenn
Tea, Jasmine	6A120C62D	01/01/1998	17	20	11/05/2015	-	910	undefined	0	2	O. Jenn
Lo, He	9A22165C7	01/01/1975	40	43	11/01/2015	-	914	undefined	0	0	J. Ong
Lo, Je	BAD9F1241	01/01/1975	40	43	11/01/2015	-	914	undefined	0	0	J. Ong
Client, Hello	E869E4460	01/01/1980	37	38	03/01/2017	-	428	undefined	0	0	J. Ong
Daniel, Dear	996EDFD20	01/01/2015	2	3	08/01/2017	-	275	undefined	0	2	J. Ong
Kitty, Hello	1C8A64AFD	01/01/1980	37	38	03/01/2017	-	428	undefined	0	3	J. Ong
Cat, Allie	9FFB3597F	01/01/2010	7	8	09/01/2017	-	244	undefined	1	0	J. Ong
Cat, Bob	901BCEED5	01/01/2010	7	8	09/01/2017	-	244	undefined	1	2	J. Ong
Cola, Coca	171F67E3C	01/01/2000	17	18	09/01/2017	09/21/2017	20	undefined	0	0	J. Ong
Cola, Ri	4152D2D03	01/01/1980	37	38	09/01/2017	09/21/2017	20	undefined	1	0	J. Ong
Client, Anonymous	EEC147421	-	-	-	10/01/2017	-	214	undefined	0	0	J. Ong
Program: CoC Outreach											
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	02/01/2016	-	822		0	0	J. Ong

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HMIS Data Quality Report

- Report Name:
  - [HUDX-225] HMIS Data Quality Report
- Where to find it:
  - HUD Reports folder
- Useful for:
  - Data Quality checks for your program
- Tips / Notes:
  - Run the report in web page format and click the numbers to find out which clients are being flagged as having data quality issues

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HMIS Data Quality Report

Nevada - Balance of State: Housing Test Agency

Report period 07/01/2017 - 06/30/2018

Q1. Report Validation Table

Program Applicability: All Projects

Total number of persons served	12
Number of adults (age 18 or over)	6
Number of children (under age 18)	6
Number of persons with unknown age	0
Number of leavers	3
Number of adult leavers	1
Number of adult and head of household leavers	1
Number of stayers	9
Number of adult stayers	5
Number of veterans	0
Number of chronically homeless persons	0
Number of youth under age 25	0
Number of parenting youth under age 25 with children	0
Number of adult heads of household	1
Number of child and unknown-age heads of household	0
Heads of households and adult stayers in the project 365 days or more	0

Q2. Personally Identifiable Information (PII)

Program Applicability: All Projects

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	% of Error Rate
Name (3.1)	3	0	0	25%
Social Security Number (3.2)	10	0	1	91.67%
Date of Birth (3.3)	0	0	4	33.33%
Race (3.4)	0	2		16.67%
Ethnicity (3.5)	0	2		16.67%
Gender (3.6)	0	0		0%
Overall Score				91.67%

Q3. Universal Data Elements

Program Applicability: All Projects

Data Element	Error Count	% of Error Rate
Veteran Status (3.7)	1	16.67%
Project Start Date (3.10)	0	0%
Relationship to Head of Household (3.15)	9	75%
Client Location (3.16)	0	0%
Disabling Condition (3.8)	3	25%

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Q4 Destination: What to look for

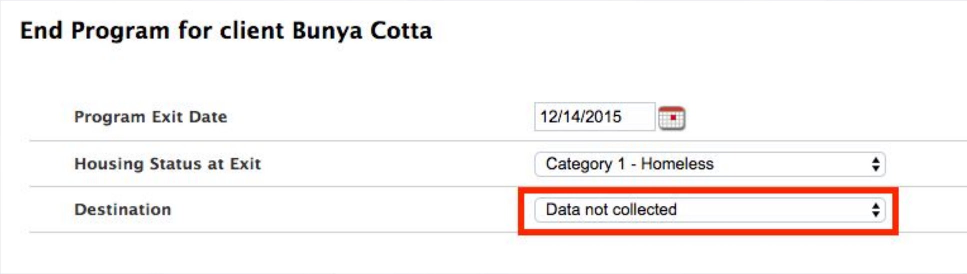
Issue:

On the Program End screen, "Destination" is:

- Client doesn't know
- Client refused
- No exit interview completed
- Data not collected
- Missing

How to fix:

If the client's exit destination is known, update the "Destination" on the Program End screen



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Q4 Income at Entry/Exit: What to look for

Possible Issues:

1.“Income from Any Source” is:

- Client doesn’t know
- Client refused
- Data not collected
- Missing

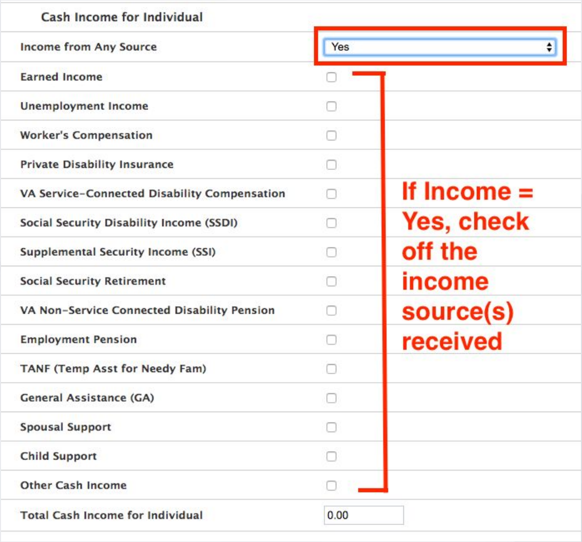
OR

2. “Income from Any Source” is Yes, but no specific income sources are checked

How to fix:

On the Enrollment or End screens, update “Income from Any Source” question

If a client does receive income, make sure to report the type of income (and the amount)



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Q4 Income at Annual Assessment

Possible Issues:

Same issues as Income at Entry or Income at Exit

OR

Annual Assessment is not entered correctly

How to fix Annual Assessment:

If the client has been in the program for more than a year, make sure an Annual Assessment was completed

Make sure Annual Assessment is dated within 30 days before / after the anniversary of program entry

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Other Best Practices

Check the **Caseload tab** - there is a section for status assessments that are due

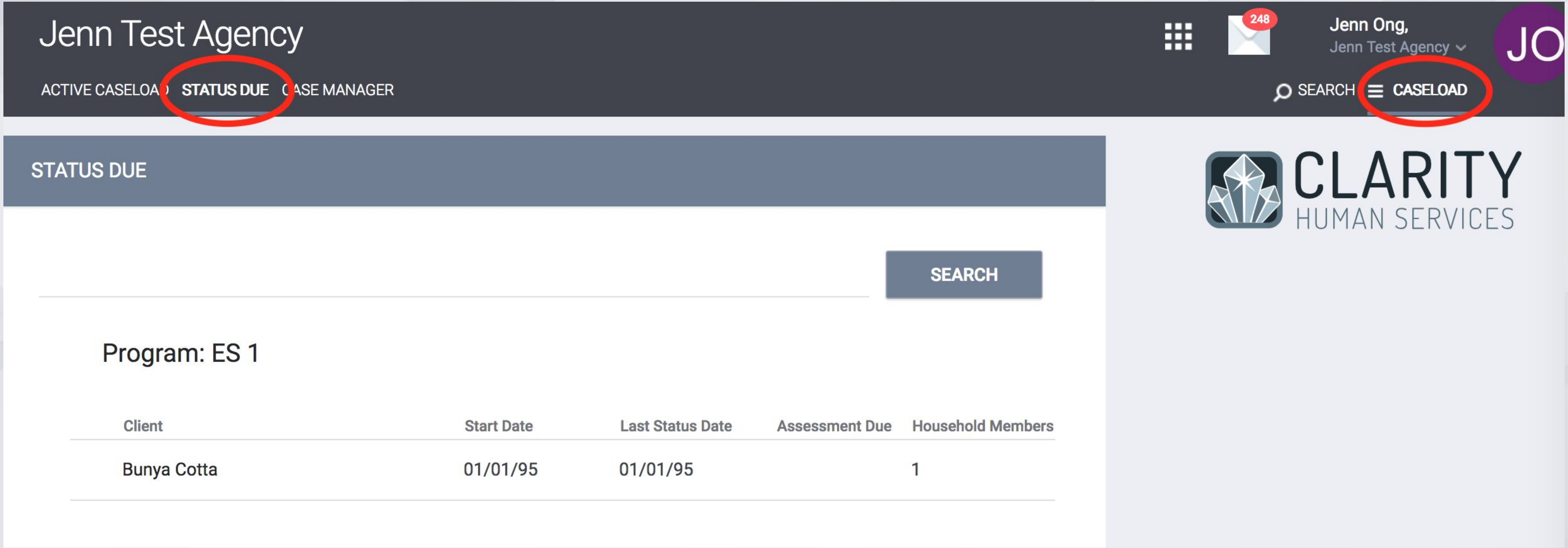
Check your data for accuracy, not just missing data

- Review enrollment, annual assessment, and exit data using the **Program Details Report**
- Check the data in your paper / case file against what is in HMIS to make sure the information is accurate

Make sure your work is captured

- Use **Service Summary** and other service reports to review services provided

Caseload Tab



Program Details Report

- Report Name:
  - [GNRL-220] Program Details Report
- Where to find it:
  - Program-Based Reports folder
- Useful for:
  - Client-level information
  - Viewing Enrollment, Status Update, Annual Assessment, and Exit data
- Tips / Notes:
  - If you can't find a Program report in the Report Library, this report gives you everything, including custom questions.

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First Name	Last Name	Agency	Assigned Staff	Staff Created	Enrollment Start Date	Enrollment Exit Date	Chronic Homeless	Housing Service	Housing Service Start Date	Housing Service End Date	DOB
7633Bec1F	Refused	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	09/01/2016		N	Case Management: Case Management	10/07/2016	10/07/2016	1975-01-01
Annette	Marsh	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/18/2016		N				1986-04-04
Bennie	Sanders	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/10/2016		N	Case Management: Case Management	10/11/2016	10/11/2016	1999-04-05
Billie	Sanders	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/10/2016		N	Case Management: Case Management	10/11/2016	10/11/2016	1972-03-03
Bob	Marsh	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/18/2016		N				2012-08-08
Ddf23229E	Refused	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	09/01/2016		N	Case Management: Case Management	10/07/2016	10/07/2016	2009-01-01
Fc949F304	Refused	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	09/01/2016		N	Case Management: Case Management	10/07/2016	10/07/2016	1974-01-01
Sally	Springs	Housing Test Agency	Alison Wilson	Alison Wilson	06/22/2018		N				1980-03-01
Sally	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/05/2016	09/30/2017	N	Case Management: Case Management	10/05/2016	10/05/2016	1980-03-01
Sammy	Springs	Housing Test Agency	Alison Wilson	Alison Wilson	06/22/2018		N				2010-04-24
Sammy	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/05/2016	09/30/2017	N	Case Management: Case Management	10/05/2016	10/05/2016	2010-04-24
Stevie	Sanders	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/10/2016		N	Case Management: Case Management	10/11/2016	10/11/2016	2005-09-09
Stevie	Springs	Housing Test Agency	Alison Wilson	Alison Wilson	06/22/2018		N				2010-01-01
Stevie	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/07/2016	09/30/2017	N	Case Management: Case Management	10/17/2016	10/17/2016	2010-01-01
Susie	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/13/2016		N				2008-08-09
Susie	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/05/2016	10/13/2016	N	Case Management: Case Management	10/05/2016	10/05/2016	2008-08-09

Service Summary Report

- Report Name:
  - [GNRL-104] Service Summary
- Where to find it:
  - Service-Based Reports folder
- Useful for:
  - Quick count of clients and service provision
- Tips / Notes:
  - Run the report in web page format and click the service names to get more detailed information

Service Summary

Housing Test Agency

Date Range: 07/01/2017 and 06/30/2018

Case Management	Unique Clients	# of Services	# of Service Days
Case Management	1	2	2

Credit Repair	Unique Clients	# of Services	# of Service Days
Credit Repair	1	1	1

Employment Counseling	Unique Clients	# of Services	# of Service Days
Employment Counseling	1	2	2

Housing Search and Placement	Unique Clients	# of Services	# of Service Days
Housing Search	0	0	0

Meal	Unique Clients	# of Services	# of Service Days
Daily Meal	18	18	26

Program Funding Source Financial Detail

- Report Name:
  - [EXPS-103] Program Funding Source Financial Detail
- Where to find it:
  - Program-Based Reports folder
- Useful for:
  - Lists all funds spent as part of financial services
  - Includes vendor and check information if entered
  - Includes totals by service and program
- Tips / Notes:
  - Good review for programs that provide rental assistance, security deposits, etc

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Funding Source Financial Detail

Housing Test Agency

Date Range: 07/01/2017 and 06/30/2018
Funding Source: Not Based on Funding Source
Include Subgrants: No

Service: Credit Repair

Service Item: Credit Repair

UID	Name	Notes	Vendor	Check No.	Check Date	Month Pd.	Funding Source	Amount
DC730E0D6	Springs, Sally				10/12/2017	October	No Funding Source	$328.00
							Service Item Totals:	**$328.00**
							Service Totals:	**$328.00**

Service: Meal

Service Item: Daily Meal

UID	Name	Notes	Vendor	Check No.	Check Date	Month Pd.	Funding Source	Amount
87B9895C9	Austen, Jane				11/30/2017	November	Funding for Shelter	$5.00
87B9895C9	Austen, Jane				12/01/2017	December	Funding for Shelter	$5.00
2C5A663F8	Baggins, Bilbo				11/30/2017	November	Funding for Shelter	$5.00
2C5A663F8	Baggins, Bilbo				12/01/2017	December	Funding for Shelter	$5.00
E1484472D	Baggins, Frodo				11/30/2017	November	Funding for Shelter	$5.00

Sharing Best Practices

How do you monitor your data?

Beyond Your Own Data

Existing Resources to Get the Information You Need

Resources in HMIS

Use the Report Library in HMIS

- Report Library Overview
- Useful Reports Quick List

Resources at your agency

Your agency's existing reports:

- Program reports for funders
- Reports that your agency uses to monitor program data
- Board reports or annual reports

Your program manager

Your HMIS Technical Administrator (also known as your HMIS Agency Administrator) is also a great resource for all things HMIS

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Agency Examples

HomeFirst ran data quality of all programs as part of a Continuous Quality Improvement Forum

Family Supportive Housing runs a report regularly to monitor the number of case management services provided within a given time period

Sacred Heart runs PR-VI-SDAT data for EAN agencies involved in Homeless Prevention

LifeMoves has program data as an agenda item at each Executive meeting

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Resources outside your agency - County Data

Santa Clara County's Office of Supportive Housing posts reports on how programs are doing County-wide and is working on posting more HMIS on their website:

- OSH Reports and Publications

HUD posts reports that cover nationwide data, based on reports submitted on the local level. Example:

- Housing Inventory Count

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Resources outside your agency - Nation-wide Data

HUD posts reports that cover nationwide data, based on reports submitted on the local level. Examples:

- Housing Inventory Count

Other sources:

- National Alliance to End Homelessness
- VA Website for Veteran Data
- Websites of other communities (example: Chicago)

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Requesting Data

What Information Do You Want to Know?

How well is my program is doing?

- % Exits to Permanent Housing
- Utilization rates - are all of the program spots filled?
- Increase in income

Is my work being reflected?

- # clients served
- # services provided
- Connection to non-cash benefits

Will we meet funding objectives?

- Look at contract objectives / report requirements

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Who to go to for data requests

You

Check out Useful Reports Handout

Look in Report Library

Your Manager

What reports does your manager use to monitor program data?

Are there any reports that your agency already produces that will help?

Agency Administrator

What reports does your Agency Administrator use to monitor data at your agency?

Are there any reports they can point you to, or help create?

Are there any annual reports or agency reports already available?

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Our Help Desk sccsupport@bitfocus.com and System Admin team can help with reporting questions!

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Useful Information to Provide

- ✓ What is the purpose for the report?
- ✓ Is this for internal use or is it being sent to someone outside of your agency?
- ✓ Is there a report template or specific statistics you need?
- ✓ Is the request associated with a specific grant or funding source?
- ✓ What program(s) are you interested in?
- ✓ What time period are you looking at? One year, one quarter, one month?
- ✓ What is the due date?
- ✓ Do you want household information or information on all clients?
- ✓ Is there a specific population you are interested in (families vs singles, youth, veterans, etc)?

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Other Tips

Start early! It may take some time to get the data you want

Know what you want - example reports or templates can be helpful

Talk it through if you're not sure

Sharing Best Practices

What reporting resources do you use?

Resources

- Report Library
  - https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library
- Santa Clara County reports
  - https://www.sccgov.org/sites/osh/ContinuumofCare/ReportsandPublications/Pages/home.aspx
- SCC HMIS Website
  - http://scc.hmis.cc/
- Bitfocus SCC HMIS Help Desk
  - sccsupport@bitfocus.com
  - 408.596.5866 x2
- Data Literacy Institute page on the SCC HMIS site
  - http://scc.hmis.cc/training/data-literacy-institute/

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Upcoming Workshops

Feb 7: How to Tell Your Story (Agency Manager)

Want to know how to use data to message your agency's successes to stakeholders and the community? Join us for some tips on how to best tell your story through your data.

Feb 12: Statistics, Charts, and Graphs (Agency Staff)

Join us for this hands-on workshop on how to create your own statistics, charts, and graphs!

May (TBD): Data Quality Workshops

Learn best practices on how to monitor and improve your data quality.

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