

The background features a dark blue grid. A white line chart with circular markers is overlaid on the grid, showing a fluctuating trend. The chart starts at a low point on the left, rises to a peak, falls to a low point, rises to a higher peak, falls to a low point, rises to a peak, falls to a low point, and finally rises to a high peak on the right.

Taking a Closer Look at Looker Dashboards & Reports in Clarity

Thursday, February 27th, 2020

AGENDA

- Welcome
 - Fun Fact About You!
 - How To Access Dashboards in HMIS
 - Review of Dashboards
 - Running/Filtering Reports - HMIS Demonstration
 - Testing Your Knowledge
 - Closing Remarks
- 
- The background features a light blue grid. At the bottom, there is a decorative graphic consisting of a white line graph with circular markers and a bar chart with vertical bars of varying heights.

Fun Fact!

*What's the most interesting thing
you can see from your office?*



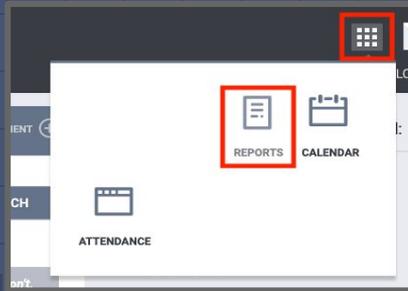
How To Access Dashboards in HMIS

1. Log in
2. Go to Data Analysis
3. You need to do the work (*but we are here to show you what to do*)
4. You may have preset queries from the System Administration team

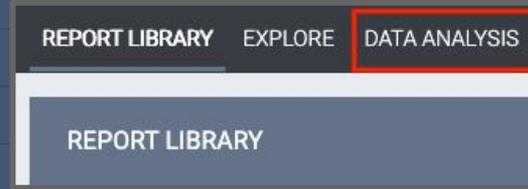
How To Access Dashboards in HMIS



Log in



Go to **REPORTS**; use the launch pad, then select reports



Select the **DATA ANALYSIS** Tab



Select the **Santa Clara County HMIS Reports**

How To Access Dashboards in HMIS

Santa Clara County HMIS Reports

Coordinated Assessment Evaluation

Coordinated Assessment Scoring by User ▶ RUN

Coordinated Assessments and Referral Results ▶ RUN

Coordinated Entry Data Quality Dashboard

Coordinated Assessment Data Quality Dashboard ▶ RUN

Data analysis section

Individuals with Expiring ROIs rev 2-26-20 ▶ RUN

SCC Clients with Open Enrollments Missing Annual Assessments

Here's a list of Reports available in the SCC HMIS Reports Section

Review of Dashboards

Coordinated Assessment Scoring by User

Intended Use:

To help agencies determine if staff are assessing and scoring clients in a normal range. Additionally, the report attempts to highlight certain users who may be scoring outside of a normal range.

It is important to note users may not score within a "normal" range due to the unique aspects of each staff member's job duties that may influence the clients they are likely to assess.

Report Information:

- Systemwide Scoring and Intervention Levels - At your agency
- Average Assessment Score (System Wide) - At your agency
- Agency Score and Intervention Levels
- Average Scores by Users
- Intervention Levels by User
- Assessment Score Distribution
- Users Who May Be Scoring Higher/Lower Than Normal

Coordinated Assessment Scoring by User

▶ FILTERS
Assessment Date is in the past 24 months
Assessing Agency Name is any value

Systemwide Scoring and Intervention Levels ?

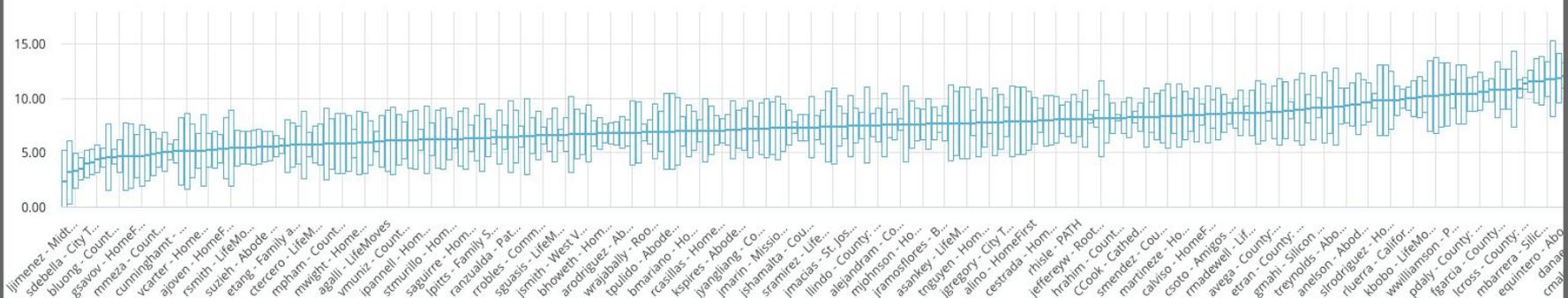
Intervention Type	Count Assessments	Average Score	Minimal Intervention % Intervention	Rapid Rehousing % Intervention	Permanent Housing % Intervention
-	16,837	7.94	10.0%	41.7%	48.3%

7.91
 Average Assessment Score (system... ?

Agency Score and Intervention Levels ?

Client Assessments	Assessing Agency Name	Intervention Type	Count Assessments	Average Score	Minimal Intervention % Intervention	Rapid Rehousing % Intervention	Permanent Housing % Intervention
1	HomeFirst	All Users	3,865	7.00	13.9%	47.7%	38.4%
2	Bill Wilson Center	All Users	1,784	8.04	6.1%	43.2%	50.7%
3	LifeMoves	All Users	1,323	6.82	13.5%	49.9%	36.7%
4	Abode Services	All Users	1,318	8.96	7.1%	40.4%	52.5%
5	County: OSH	All Users	1,271	8.61	4.8%	38.6%	56.6%

Average Scores by User ?



Coordinated Assessment Scoring by User

► **FILTERS** Assessment Date is in the past 24 months Assessing Agency Name is any value

This represents the scoring and intervention levels for all agencies in the system. Data that you do not have privileges to view will not be included here.

Systemwide Scoring and Intervention Levels ⓘ

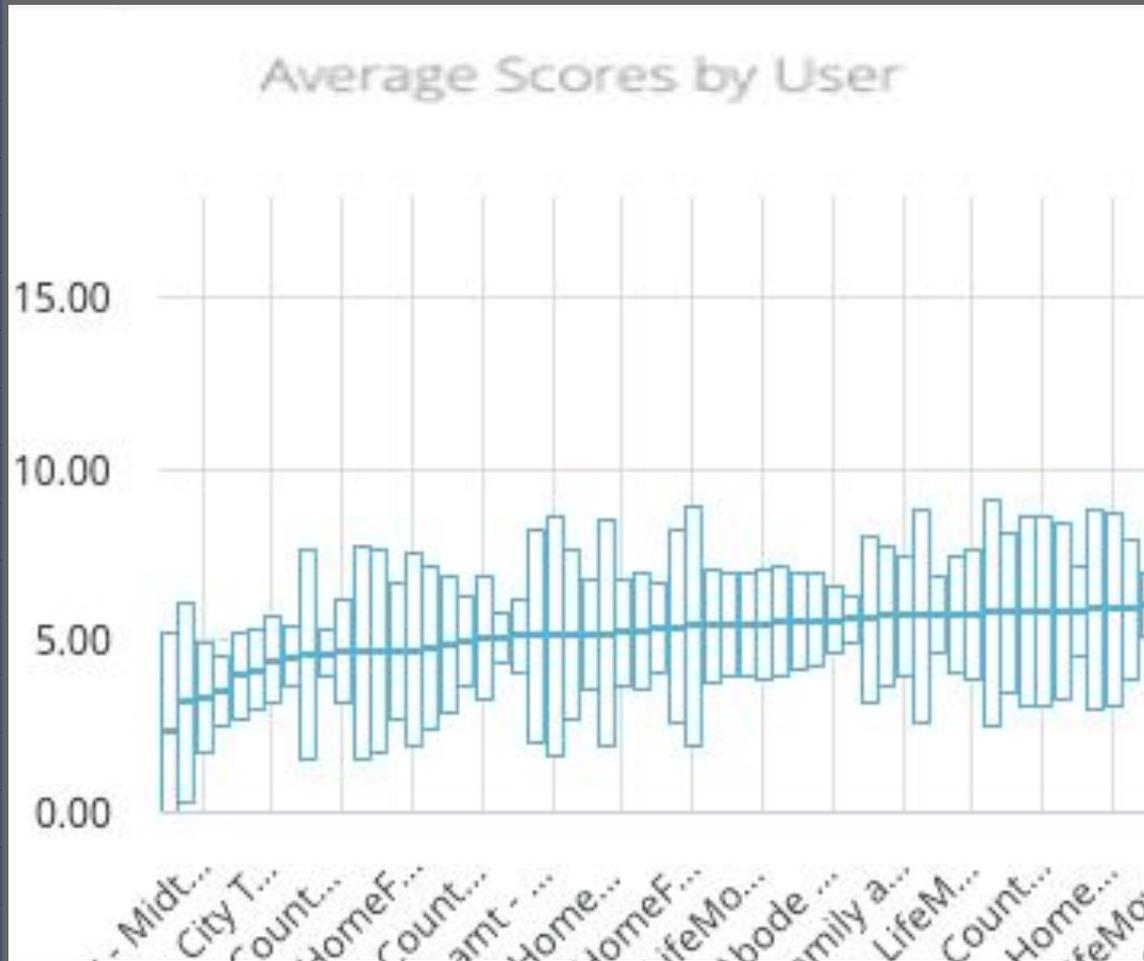
Intervention Type >	Count Assessments	Average Score	Minimal Intervention % Intervention	Rapid Rehousing % Intervention	Permanent Housing % Intervention
1 All Users	16,837	7.94	10.0%	41.7%	48.3%

Agency Score and Intervention Levels ⓘ

Client Assessments	Assessing Agency Name	Interventio... >	Count Assessments	Average Score	Minimal Inter... % Intervent...	Rapid Rehou... % Interven...	Perm % Int
1	HomeFirst	All Users	3,865	7.00	13.9%	47.7%	38.4%
2	Bill Wilson Center	All Users	1,784	8.04	6.1%	43.2%	50.7%

Systemwide Scoring/Agency Score and Intervention Levels - Shows data at your agencies only

- Shows total number of assessments completed
- Average assessment score for VI-SPDAT, VI-F-SPDAT, VI-Y-SPDAT, and JD-VI-SPDAT
- Shows the percent of assessments completed in each intervention range.



- Shows average score by Staff with min & max bars representing a confidence interval.
- Staff with fewer assessments have a wider confidence interval and staff with more assessments have a narrower interval.

Review of Dashboards

Coordinated Assessment Scoring by User

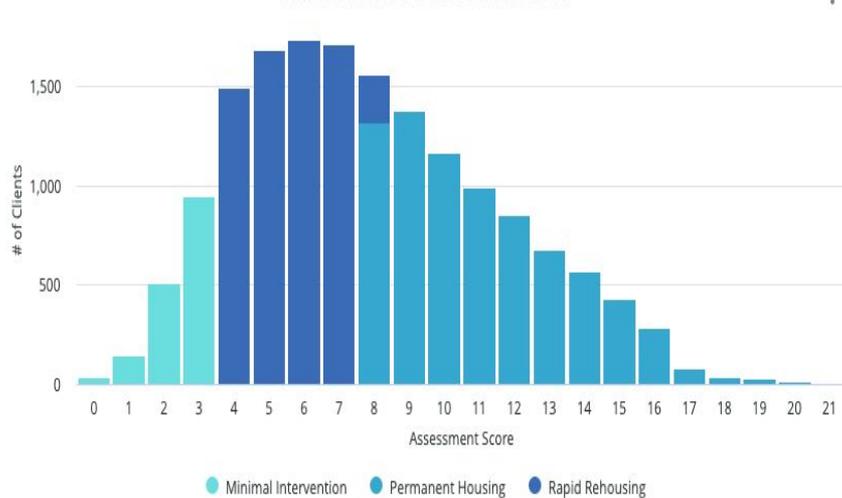
Intervention Levels by User ⓘ							
Intervention Type >		Minimal Intervention			Rapid Rehousing		Permanent Housing
Assessing Agency Name ^	User	Average Score	Assessments Count	%	%	%	%
1	Abode Services	8.26	23	13.0%	39.1%	47.8%	
2	Abode Services	6.80	15	13.3%	60.0%	26.7%	
3	Abode Services	5.55	93	19.4%	69.9%	10.8%	
4	Abode Services	6.51	37	10.8%	51.4%	37.8%	
5	Abode Services	6.42	12	8.3%	66.7%	25.0%	
6	Abode Services	13.51	129	∅	9.3%	90.7%	
7	Abode Services	5.11	18	16.7%	83.3%	∅	
8	Abode Services	5.24	34	14.7%	76.5%	8.8%	
9	Abode Services	6.92	13	∅	76.9%	23.1%	
10	Abode Services	7.13	75	1.3%	77.3%	21.3%	
11	Abode Services	6.94	51	3.9%	62.7%	33.3%	
12	Abode Services	7.11	27	7.4%	51.9%	40.7%	
13	Abode Services	9.28	40	∅	30.0%	70.0%	
14	Abode Services	14.31	42	∅	∅	100.0%	
15	Abode Services	6.90	31	12.9%	38.7%	48.4%	
16	Abode Services	13.95	78	∅	∅	100.0%	
Totals		7.94	16,837	10.0%	41.7%	48.3%	

Please note: Users with less than ten (10) Assessments are not shown.

Review of Dashboards

Coordinated Assessment Scoring by User

Assessment Score Distribution



Users Who May Be Scoring Higher/Lower Than Normal ⓘ

	Assessing Agency	User	Count Assessments	Avg Score	High/Low Scorers
1	Abode Services		27	15.37	High
2	County: OSH		17	14.76	High
3	Family and Children Servi...		13	14.62	High
4	County: SCVHHS - BHSD ...		14	14.43	High
5	Abode Services		42	14.31	High
6	Community Solutions		14	14.14	High
7	County: OSH		11	14.09	High
8	County: OSH		31	14.06	High
9	Abode Services		78	13.95	High
10	Bible Way / Destiny		21	13.90	High
11	Superior Court of CA, Co...		92	13.75	High
12	Abode Services		129	13.51	High
13	County: OSH		13	13.15	High
14	New Directions - Peninsu...		14	13.14	High
15	County: Reentry Resourc...		101	13.05	High

Review of Dashboards

Coordinated Assessment and Referral Results

Intended Use:

To share Coordinated Assessment referral outcomes in the Coordinated Assessment System.

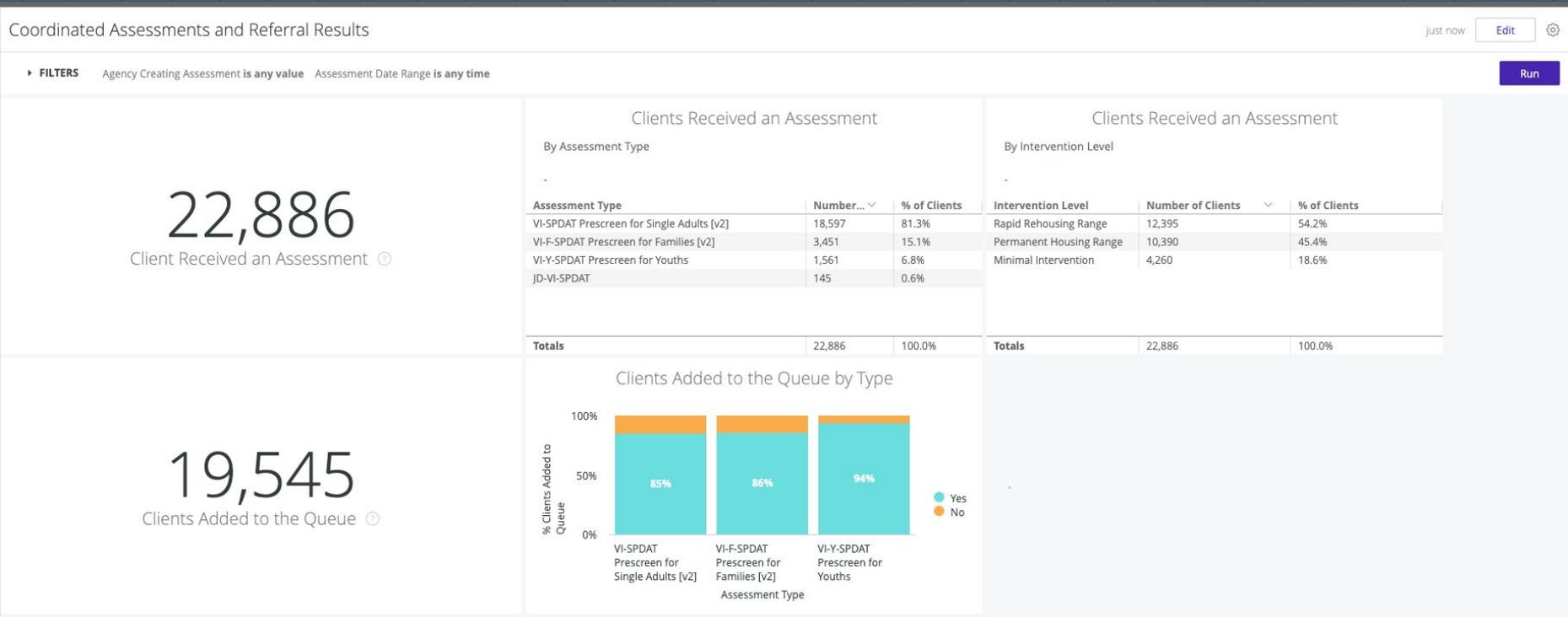
Answers the question: 'what happens to clients I assessed?'

Report Information:

- Client Received an Assessment
 - Client Received an Assessment by Assessment Type
 - Client Received an Assessment by Intervention Level
- Clients added to the Queue
 - Clients added to the Queue by Type (assessment type)
- Queue Referrals Completed
 - Completed Referral Reasons
 - Project Types Enrolled In
- Queue Referrals Denied
 - Denied Referral Reasons
- Queue Referrals with a Housing Outcome

Review of Dashboards

Coordinated Assessment and Referral Results



Please note: This includes all Assessment Types

Review of Dashboards

Coordinated Assessment and Referral Results

3,667
Queue Referrals Completed

2,878
Queue Referrals Denied

Completed Referral Reasons

Reason Referral Completed	Number of Clients
Referral Connected to Enrollment	1,906
Automated Removal: Housed with Comm...	1,683
Other:	125
Self Resolved:	34
Self Resolved: Rental By Client	32
Self Resolved: Housed with Community In...	19
Whereabouts Unknown: No Contact In 90 ...	19
Self Resolved: Housed with RRH - Not with...	11
Reassessed: As A Single	7
Self Resolved: Permanently Living with Fa...	6
Totals	3,667

Program Types Enrolled In

Project Type Code	Number of Clients
Street Outreach	789
PH - Rapid Re-Housing	689
Services Only	315
Transitional Housing	80
PH - Permanent Supportive Housing (disa...	18
Emergency Shelter	4
Emergency Shelter	1
Totals	1,873

Denied Referrals Reason

Denied Reason	Number of Clients
1 Other	675
2 Client did not show up or call	529
3 Client could not be located	482
4 Lack of Eligibility	434
5 Self Resolved - Client Housed	353
6 Client refused services	165
7 Referral time expired	125
8 Client out of jurisdiction	69
9 Client currently incarcerated	52
10 Needs could not be met by program	52
Totals	2,878

Please note: This includes all Assessment Types

Review of Dashboards

Coordinated Assessment and Referral Results



2,468

Queue Referrals With a Housing Outcome

This includes any referral with a direct connection to a PSH or RRH enrollment. Or completed referrals with a reason of "Self Resolved" or "Housed with Community Inventory."

Review of Dashboards

Coordinated Assessment Data Quality Dashboard

Intended Use:

To help agencies review Coordinated Entry Assessment data quality.

Identifies users who:

- Did not click refer to queue
- Recorded another assessment before 365 days
- Set assessments or profiles to private

Report Information:

- # of Assessments Missing Referrals
- # of client with same type of Assessment
- # of client with different types of Assessment
- Referrals Set to Private
- Assessments Set to Private
- Private profiles with VI-SPDATs



869

of Assessments Missing Referrals

VI-SPDATs Missing Referrals

	Assessing Agency Agency Name	Client Assessments User Creating	Clients Client Full Name	Clients Unique Identifier	Client Assessments Assessment Date	Client Assessments Assessment Score	Client Referral Status Ever on Queue	Client Referral Status Is client currently on queue?	Referrals Count
1					2020-02-27	11	No	No	0
2					2020-02-27	7	No	No	0
3					2020-02-27	7	No	No	0
4					2020-02-26	4	No	No	0

This includes VI-SPDAT assessments, recorded in the past 365 days, with a score of 4 or higher and missing a corresponding Referral.

VI-SPDATs Missing Referrals

- Assessing Agency
- User who recorded the assessment
- Client's full Name
- Client's Unique ID
- Assessment Date
- Assessment Score

395

Clients with Same type of Assessments

Clients With More Than One Completed Assessment of...

Assessment Name <		VI-Y-SPDAT Prescreen for Transition Age Youth with SCC local questions	VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions	VI-F-SPDAT Prescreen for Families [V2] with SCC local questions	JD-VI-SPDAT Justice Discharge Prescreen for Single Adults with SCC local questions
Full Name	Unique ID ∨	Client Assessments Count	Client Assessments Count	Client Assessments Count	Client Assessments Count
1					

This includes Clients who have more than 1 VI-SPDAT assessment of a single type recorded in the past 365 days.

93

Clients with Different types of Assessments

Clients With More Than One Completed Assessment of ...

Full Name ∨	Unique ID
5	
6	
7	
8	
9	
10	
11	
12	

This includes Clients who have more than 1 VI-SPDAT assessment of any type recorded in the past 365 days.

Detail view: Clients with more than one assessment

Clients with more than one assessment completed within 365 days

- Client's full Name
- Client's Unique ID
 - Detail View
 - User who recorded the assessment
 - Assessment name
 - Assessment Date

4

of Referrals

SCC Referrals set to Private

Unique Identifier	Agency Name	User	Private	AS ID
1				
2				
3				

This includes referrals added to the community queue in the past 365 days that have been marked "private", and therefore cannot be seen in Clarity except for by the agency that marked it private.

69

of Assessments

SCC Assessments set to Private :

Unique Identifier	Agency Name	User Creating	Private (Yes / No)
1			
2			
3			
4			
5			

This includes any type of VI-SPDAT kind of assessment, recorded in the past 365 days, that has been marked "private" and therefore cannot be seen in Clarity except for by the agency that marked it private.

7

of Private Client Profiles

Private Profiles with saved VI-SPDAT...

Clients Unique Identifier	Agencies Agency Name	Clients User Updating	Clients Private (Yes / No) ^	Cli As N:

This includes client profiles that have been marked "private", and that also have a VI-SPDAT type of assessment saved, in the past 365 days. When profile marked private, the client will not come up in searches, except for the agency that marked it private.

Review of Dashboards

Individuals with Expiring ROIs

Intended Use:

To identify recently enrolled individuals whose ROIs have expired. Run this report to reach out to staff members working with this person and tell them to update the ROI if it's expired or to let them know that the ROI will expire soon.

Report Information:

- Provides the client's Unique ID for clients currently active in a program in your agency (no exit date)
- Release of Information End Date
- Program at your agency where they are currently enrolled
- Project Start Date
- Assigned Staff (usually the person who completed the enrollment)

Individuals with Expiring ROIs rev 2-26-20

500 rows · 0.2s · just now

Run



▼ FILTERS (5)

Custom F

Enrollments **Reporting Period Filter**
Required

is in the past



30

days

Agencies **Agency Name**

is equal to

Enrollments **Active in Project**

is equal to



Yes ✕

Programs **Name**

is equal to

Release of Information **End Date**

is in range



2019-01-01



until (before)

2020-03-31



▼ VISUALIZATION



TABLE (LEGACY)



EDIT



	Clients Unique Identifier	Release of Information End Date ^	Programs Name	Enrollments Project Start Date	Enrollments Assigned Staff
1				2016-02-29	
2				2019-09-14	
3				2019-11-07	

Individuals with Expiring ROIs

- Client Unique ID
- ROI end Date
- Program where Individual is currently enrolled
- Assigned Staff

Review of Dashboards

SCC Clients with Open Enrollments Missing Annual Assessments

Intended Use:

To support staff in identifying and updating enrollments with missing Annual Assessments.

Especially helpful for PSH enrollments.

Report Information:

- Client's Unique ID
- Project Start Date
- Annual Assessment Status:
 - Completed Out of Range
 - Due
 - Past Due
 - Due in 30-60 Days

SCC Clients with Open Enrollments Missing Annual Assessments

Run



FILTERS (9) Enrollments Reporting Period Filter **is any time** Agencies Agency Name **is any value** Agencies CoC Code **is "CA-500"** Enrollments Active in Project **is "Yes"**

VISUALIZATION



TABLE (LEGACY)



EDIT



	Agency Name	Name	Unique Identifier	Project Start Date	Targeted Annual Assessment	Annual Assessment Status	Annual Assessment Date
1				2018-10-01	2019-10-01	Completed out of range	2019-11-24
2				2018-05-21	2019-05-21	Completed out of range	2019-09-05
3				2017-12-02	2019-12-02	Completed out of range	2019-08-28
4				2017-04-03	2018-04-03	Completed out of range	2018-05-24
5				2017-04-03	2018-04-03	Completed out of range	2018-05-24
6				2017-04-03	2018-04-03	Completed out of range	2018-05-24
7				2017-04-03	2018-04-03	Completed out of range	2018-05-24
8				2017-04-03	2018-04-03	Completed out of range	2018-05-24
9				2015-10-12	2018-10-12	Completed out of range	2018-05-20
10				2013-07-17	2016-07-17	Completed out of range	2016-02-04
11				2010-07-28	2015-07-28	Completed out of range	2016-01-25
12				2019-02-24	2020-02-24	Due	∅
13				2018-02-23	2020-02-23	Due	∅

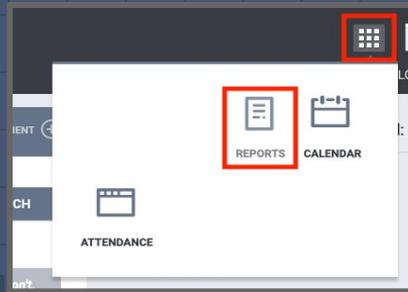
Running Dashboards & Filtering HMIS Demonstration



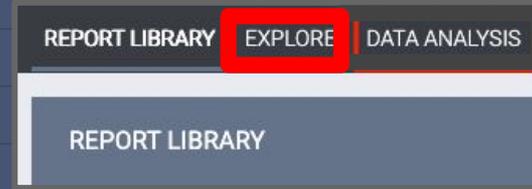
How To Create Custom Reports using Explore



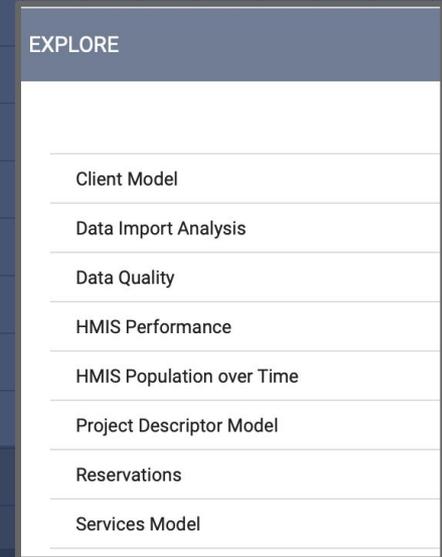
Log in



Go to **REPORTS**; use the launch pad, then select reports



Select the **DATA ANALYSIS** Tab



Select the **Looker Model**

Looker Models available in the Explore Tab

Client Model:

- Clients only a profile screen was created
- Assessments like the VI-SPDAT
- Enrollments
- Services

Data Import Analysis: Not used at this time

Data Quality:

- Used for analyzing data quality performance for projects
- Covers all HUD HMIS data elements
 - Annual Assessment Date - Date the Annual Assessment was completed.
 - Annual Assessment Status - summarizes the status of annual assessments
 - Annual Assessment w/i 30 Days of Anniversary - calculates whether the Annual Assessment was within 30 days of the anniversary date.
- Head of Household Project Start Date - For all Federal reporting, the Annual Assessment due date is the anniversary of the HoH's project start date.
- Targeted Annual Assessment - The date, based on the HoH project start date, when the Annual Assessment was or will be due.

Looker Models available in the Explore Tab

HMIS Performance:

- Most popular, general purpose model
- Must have a project enrollment to be included in this model

HMIS Population over Time

- Longitudinal analysis
- Program evaluators may be interested in this model
- Look at total client population on a given day
- Analyze long term trends in your data
- Must have a project enrollment to be included in this model

Looker Models available in the Explore Tab

Project Descriptor Model

- No client data
- Information about projects and agencies
- System administrators would use this model
- Agency managers may find it useful for staff Looks (without client data)

Reservations- not used at this time

Services Model

- Use for services that may or may not be connected to a project enrollment
- Must have a service to be included in this model
- Contains many of the same dimensions as the HMIS Performance model

Testing Your Knowledge



Testing Your Knowledge: Kahoot!

Let's Take a Look at What You
Learned

THANKS!

Any questions?

You can find us at

- Janelf@Bitfocus.com
- TrevorM@Bitfocus.com
- scc-admin@Bitfocus.com
- sccsupport@Bitfocus.com

