

Using the Data Analysis Tab to Identify Clients Assessed & Not On Community Housing Queue: How to Guide

Overview

This guide is aimed at assisting Santa Clara County HMIS End Users in maintaining the Coordinated Entry (CE) Assessment Data Quality for the community. If an eligible client has completed the Coordinated Entry assessment (VI-SPDAT) and has not been referred to the **Community Housing Queue**, they will not be connected to housing opportunities.

In this guide you will find detailed instructions on running the Data Analysis Report to identify assessments missing referrals to the community queue: **SCC Community Queue and Assessments Data Quality Dashboard (2020)**

Please note that this dashboard contains several additional tiles about your assessments and referrals. This guide is only covering how to use tile #1 and tile #2 to identify clients with assessments missing referrals.

Using the client list generated by the report, please work with staff to confirm the client(s) is eligible for the Community Housing Queue and refer them through the relevant assessment in Clarity.



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Steps to run the report

- From Login – navigate to the Search page in HMIS
- Under your name: Make sure your agency appears. The agency that appears under your name is indicating which "Switch" agency you are in
- Click on the Report Library square in upper right corner of screen next to your name and message box, then click: Reports
- Once the new page has populated, you will see 3 tabs: Reports, Explore, and Data Analysis. Navigate to the Data Analysis tab.
- Find Santa Clara County HMIS Reports , click the drop down arrow next to the number of reports. There should be between 50-60 reports in this section.
- The Drop down will contain several buckets of reports, which are in bold. You can either scroll down to the Coordinated Entry Data Quality bucket – or use the web browser's search/find function and navigate to the report: "SCC Community Queue and Assessments Data Quality Dashboard (2020)"
- Click on "Run" next to the report named "SCC Community Queue and Assessments Data Quality Dashboard (2020)"
- In the top left of the report you will enter your agency name into the box labeled: "Agency Filter"
- Run the report again by clicking the update button in the top right hand corner of the report. It looks like an arrow going in a circle.
- The 2nd box will provide the name of the staff member who completed the assessment without referring – as well as the client's unique ID.
- Refer eligible clients to the Community Housing Queue

Clients Assessed & Not On Community Housing Queue

Running the Dashboard in the Data Analysis Tab

<p>A) Login into HMIS</p>	<p>H) Click on "Run" next to the report "<u>SCC Community Queue and Assessments Data Quality Dashboard (2020)</u>"</p>
<p>B) Ensure you are in the correct Agency (this is under your name/photo)</p>	<p>I) In the top left of the report select your agency name from the list of options or begin typing agency name into the box labeled "<u>Agency Filter</u>"</p>
<p>C) From the Launchpad/Rubik's cube, select the REPORT module</p>	<p>J) Run the report by clicking the update button in the top right hand</p>
<p>D) Once the new page has populated, you will see 3 tabs: Reports Library, Explore, and Data Analysis</p>	<p>K) The 2nd box will provide the name of the staff member who completed the assessment without referring – as well as the client's unique ID.</p>
<p>E) Navigate to the Data Analysis tab</p>	
<p>F) Select the <u>Santa Clara County HMIS Reports</u>, click the drop down arrow next to the number (55)</p>	
<p>G) You will see several reports listed; scroll down to the <u>Coordinated Entry Data Quality</u> section and select the "<u>SCC Community Queue and Assessments Data Quality Dashboard (2020)</u>"</p>	<p>Refer the Client to the CQ as usual</p> 