

## INTRODUCTION: CCP Reports User Guide

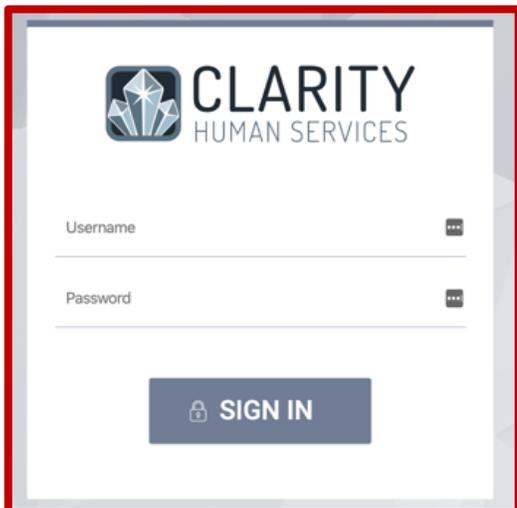
This user guide will provide guidance on how to use Clarity Dashboards which are located in the Data Analysis Tab within the Report Library. Please note that only Agency Staff with Data Analysis (DA) access will be able to pull these reports. The following CCP reports are available

- I. **CCP Clients with Open Enrollments Missing Annual Assessment**
- II. CCP Data Quality by User
- III. **CCP Data Quality Dashboard**
- IV. CCP Data Quality Dashboard - Veterans Filter
- V. **CCP Expiring ROIs 8-16-19**
- VI. CCP Housing Move-In Date vs PSH Service Discrepancies

This guide will cover reports **I**, **III**, and **V**, since these are the most commonly run reports. However, all reports are accessed and run in the same manner.

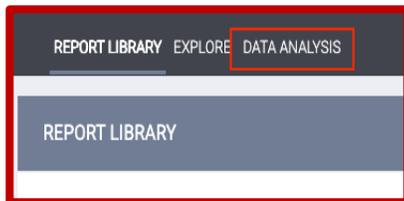
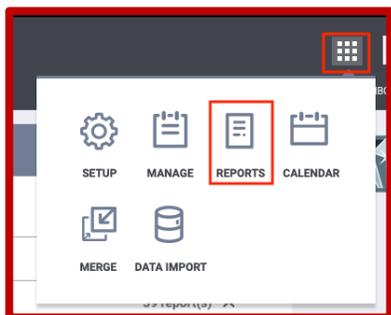
## Log into Clarity

Before accessing the Reports Library in Clarity, you will need to log in. If you do not have a login, please check-in with your Agency Lead to discuss next steps for acquiring access.



## Report Library

Once logged in, from the launcher select the **Reports** option (see image below). This will open up the **Report Library**. Select the **Data Analysis Tab** (see image below), this is located in the top left side of the screen. When selected a list of Data Analysis reports will populate. Select the **Santa Clara County HMIS Reports** (see image below). Use the upside-down caret to expand the list of reports. Scroll down to the **CCP Reports** section (see image below).



You should see the following list of CCP Reports available. Select the appropriate report from the list to see the Dashboard.

Santa Clara County HMIS Reports		39 report(s) ^
<b>CCP Reports</b>		
CCP Clients with open enrollments missing annual assessment		▶ RUN
CCP Data quality by user		▶ RUN
CCP Data Quality Dashboard		▶ RUN
CCP Data Quality Dashboard - Veterans Filter		▶ RUN
CCP Expiring ROIs 8-16-19		▶ RUN
CCP Housing Move-In Date vs PSH Service Discrepancies		▶ RUN
Test Income Source Change		▶ RUN

## REPORTS

### I. CCP Report: CCP Clients with Open Enrollments Missing Annual Assessment

The CCP Clients with Open Enrollments Missing Annual Assessment Report pulls the following information (see table below). This dashboard maintains a record of active clients for whom an Annual Assessment was not provided.

*Please note this (and all the CCP) dashboards display information for all agencies that participate in CCP. This information can be seen by other staff that login into Clarity who have DA access.*

## CCP REPORTS USER GUIDE

Column Name	Description
Agency Name	Name of the Agency
Program Name	Name of the specific CCP Program
Unique ID for the client	Client UID#
Project Start Date	The date the client started the project
Targeted Annual Assessment	The date the Annual Assessment was expected to be conducted
Annual Assessment Status	Indicates when the Assessment was provided; <b>it will only show those assessments that were not given to the client</b>
Annual Assessment Date	The date the client was provided the assessment
[CCP] Agency Providing Case Management	The agency providing case management to the client
ICM Program	The program providing the case management
ICM Case Manager	The case manager providing case management

Once the report is run another screen will populate displaying the Dashboard (see image below).

CCP Clients with open enrollments missing annual assessment 1h ago Edit

**FILTERS**

Agency: is equal to  +

Active in project: is equal to  +

Assessment Status: is  Past Due +

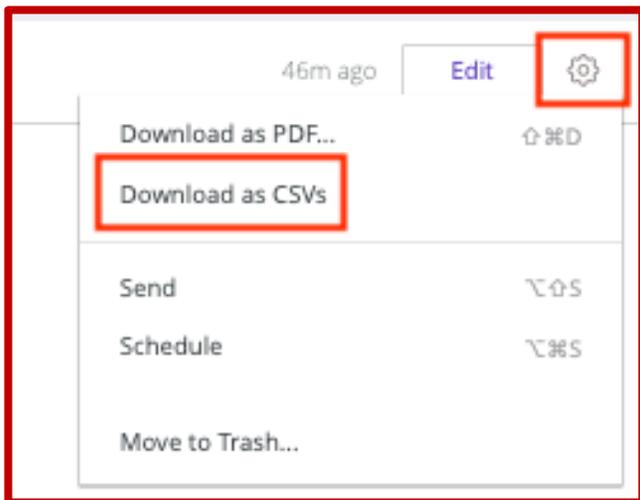
Run

CCP Clients with open enrollments missing annual assessment

Agency Name	Name	Unique Identifier	Project Start Date	Targeted Annual Assessment	Annual Assessment Status	Annual Assessment Date	[CCP] Agency Providing Case Management	ICM Program	ICM Case Manager
1 Abode Services	[CCP Housing Maintenance] HUD Family Housing		2017-06-28	2019-11-18	Past Due		County: OSH	Family Housing	Raquel Pedraza
2 Abode Services	[CCP Housing Maintenance] HUD Family Housing		2016-11-11	2019-11-18	Past Due		County: OSH	Family Housing	Raquel Pedraza
3 Abode Services	[CCP Housing Maintenance] HUD Family Housing		2016-11-18	2019-11-18	Past Due		County: OSH	Family Housing	Raquel Pedraza
4 Abode Services	[CCP Housing Maintenance] HUD Family Housing		2016-11-11	2019-11-18	Past Due		County: OSH	Family Housing	Raquel Pedraza
5 Abode Services	[CCP Housing Maintenance] SCC Rental Assistance Program		2012-03-29	2019-11-18	Past Due		The Health Trust: County Collaborative	Chronically Homeless in the City of San Jose	Jason Brigel
6 Housing Authority of Santa Clara County (HACSC)	[CCP Housing Maintenance] Laurel Grove PBV		2018-11-15	2019-11-15	Past Due		New Directions	WPC ICM	Carlin Bitcon
7 Abode Services	[CCP Housing Maintenance] HUD Housing Placement for MRR		2018-11-12	2019-11-12	Past Due		County: OSH	Housing Case Management for Medical Respite Recovery CM	Laura Anderson
8 County of Santa Clara MHS	[CCP Housing Maintenance] Non-CCP Housing		2016-11-08	2019-11-08	Past Due		County: OSH	Non-CCP CM	Valerie Robinson
9 Housing Authority of Santa Clara County (HACSC)	[CCP Housing Maintenance] Second Street PBV		2018-11-08	2019-11-08	Past Due		Abode Services	PFS - Project Welcome Home	zzzUnknown
10 Housing Authority of Santa Clara County (HACSC)	[CCP Housing Maintenance] Second Street PBV		2018-11-06	2019-11-06	Past Due		Abode Services	PFS - Project Welcome Home	zzzUnknown
11 Housing Authority of Santa Clara County (HACSC)	[CCP Housing Maintenance] Second Street PBV		2018-11-05	2019-11-05	Past Due		Abode Services	PFS - Project Welcome Home	zzzUnknown
12 Abode Services	[CCP Housing Maintenance] SCVHHS Supporting Housing Program PSH		2017-11-02	2019-11-02	Past Due		New Directions	WPC ICM	ccpplacemaker

Please note this dashboard does not have a drilldown option, therefore selecting the client UID will not reroute you to the client's profile in Clarity. However, if you are able to export the report to a csv file where you can isolate the data as it pertains to your agency only you can then copy and paste the UID into Clarity to pull the clients information.

To export the Dashboard, select the **cogwheel** located in the top right-hand corner of the dashboard. Once it displays the options, select the **Download as CSV's**. This will download the file which you can save as an excel file if you prefer, and then add a filter that will allow you to see data for your agency only and commence data clean-up (see image below).



### III. CCP Data Quality Dashboard

This dashboard contains **three reports** that can help your agency monitor data quality for your CCP ICM clients. Use these reports to review the clients receiving ICM services from your agency.

*Please note this (and all the CCP) dashboards display information for all agencies that participate in CCP. This information can be seen by other staff that login into Clarity who have DA access.*

#### How To Run the CCP Data Quality Reports

- A. *Click the Filters section (see image below)*
  - a. The report defaults to clients active in the last 30 days. To change this, look at the "Enrollments Reporting Period Filter". Click on "is in the past" and change it to "is in range". It will then let you enter report start and end dates.
- B. Delete "Your Agency Name" and type in your agency's name. Note: your agency's name should match the way it is listed in the upper right-hand corner when you are logged into HMIS.
  - a. If you want to view data for the Head of Household only, change "Head of Household" from "is any value" to "is". The default value should appear as "Yes".
- C. *Click "Run"*
  - a. The reports on the dashboard should show a preview of your data. If "No Results" appears, check your Filters and try again.
- D. *To download, click the cogwheel icon and choose "Download as CSVs"*
  - a. The file will download onto your computer as a zip file. You can double-click it for a folder with all 3 data quality reports included.

Please see below for a detailed description of each report.

*Important Note: Do NOT click "Edit" button in the upper right corner.*

CCP Data Quality Dashboard 3m ago [Edit](#)

**FILTERS** Run

Agency Providing Case Management

Report Period

Head of Household

Project Exit Date

## REPORT 1: CCP ENROLLMENTS

This report gives you a roster of all of your agency's ICM clients served during the time period you specify. Use this report to review the following (see image below).

- A. All of your ICM clients are on the report
- B. Enrolled in the correct subsidy program
- C. Project Start Date is correct
- D. Project Exit Date is correct, if applicable
- E. ICM Program and ICM Case Manager are correct
- F. Assigned Staff is correct
- G. Income is up to date
- H. Housing Move-In Date is correct. Note: Housing Move in Date is only collected for Head of Household. Use the filter above to only include Head of Households when checking for missing Housing Move in Dates.
- I. If Services Count is 0, then the client doesn't have any ICM Case Management, housing location, behavioral health, medical home, or income services linked to the enrollment. Check for accuracy.

CCP DQ Report - All Enrollments by Agency rev 8-2-18

Clients Unique Identifier	Clients Client Full Name	Programs Full Name	Enrollments Project Start Date	Enrollments Project Exit Date	Enrollments Head of Household (Yes / No)	Enrollments Household Id	Update/Exit Custom [CCP] Agency Providing Case Management	ICM Program	ICM Case Manager	Enrollments Assigned Staff	Entry Screen Total Cash Income	Update/Exit Screen Total Cash Income	Entry Screen Housing Move-in Date	Update/Exit Screen Information Date	Update/Exit Screen Data Collection Stage	Services Count
<p>No Results</p> <p>Results when available, will appear in the corresponding columns</p>																

## REPORT 2: CCP OBJECTIVES

This report gives you an overview of which clients have a Behavioral Health, Medical Home, and Met Income Target service. This report ONLY includes clients who have had at least one of the following services: "Connect to Behavioral Health", "Connect to Medical Home", and

“Met Income Target”. A client without at least one of these services will not appear in the report. Use this report to review the following (see image below).

- A. All CCP clients who met the CCP Behavioral Health, Medical Home, or Met Income Target objectives are included
- B. Check to make sure all of your ICM clients who met these goals are on the report
- C. Review Services
  - a. If a service is recorded for the client, the earliest (i.e. “first”) Service Start Date will appear
  - b. Service First Start Date is correct and should be on or after the Project Start Date
  - c. If the Service First Start Date is blank, then that service has not been recorded for that client. If the client met the CCP objective, then a service should be added.

CCP DQ Report - CCP Objectives by agency Rev 8-14-18											
Clients Unique Identifier	Clients Client Full Name	Programs Full Name	Enrollments Project Start Date	Enrollments Project Exit Date	Enrollments Head of Household (Yes / No)	Enrollments Household Id	ICM Program	ICM Case Manager	Update/Exit Screen Total Cash Income	Services Name	Services First Start Date
No Results Results when available, will appear in the corresponding columns											

### REPORT 3: HOUSING SERVICE

This report gives you an overview of which clients have a housing service and which apartment complex/location is recorded (e.g. Curtner, Onizuka). This report ONLY includes clients who have had at least one housing service. A client without at least one of these services will not appear in the report. Use this report to review the following (see image below).

- A. All CCP clients who were housed are included
  - a. Check to make sure all of your ICM clients who were housed are on the report
- B. Review Services
  - a. The report will show 1 or more columns, each labeled with a location (e.g. Curtner, Onizuka, scattered site). If the client has a service recorded for that location, then the Service First Start Date will show the start date recorded in HMIS.
- C. Location should be accurate (i.e. Curtner, Onizuka, scattered site)
- D. Service First Start Date should be on or after the Housing Move-In Date and reflect the date the client moved into that housing location.
  - a. For example: If a client moved into Palm Tree on 1/1/2018 and never changed locations, both the Housing Move-In Date and the Service First Start Date will be 1/1/2018, and the date will appear under a column that says “Palm Tree”.

## CCP REPORTS USER GUIDE

- b. If the client later moves into Parkside on 7/1/2018, there will be another column for "Parkside", and the date listed there should be "7/1/2018" for that client.

CCP DQ Report - Housing Service by Agency Rev 8-14-18										
Clients Unique Identifier	Clients Client Full Name	Programs Full Name	Enrollments Project Start Date	Enrollments Project Exit Date	Enrollments Head of Household (Yes / No)	Enrollments Household Id	ICM Program	ICM Case Manager	Services First Start Date	Services First Start Date
No Results										
Results when available, will appear in the corresponding columns										

### V. CCP Expiring ROI's Dashboard

The CCP Expiring ROI's Dashboard pulls the following information (see table below). This dashboard maintains a record of active clients for whom a ROI is about to expire. You can change the Release of Information End Date for a particular range you are looking for. Once you have updated the filters, be sure to RUN the report (see image below).

*Please note this (and all the CCP) dashboards display information for all agencies that participate in CCP. This information can be seen by other staff that login into Clarity who have DA access.*

Column Name	Description
Agency Name	Name of the Agency
Program Name	Name of the specific CCP Program
Unique ID for the client	Client UID#
Release of Information End Date	The End Date entered for the ROI
ICM Program	The program providing the case management
ICM Case Manager	The case manager providing case management
Update/Exit Custom [CCP] Agency Providing Case Management	The agency providing case management to the client

The screenshot shows the 'CCP Expiring ROI's Dashboard' with several filter sections:

- Enrollments Reporting Period Filter:** Set to 'is in the past' for 30 days.
- Enrollments Active In Project:** Set to 'is equal to' with a value of 'Yes/No'.
- Enrollments Head of Household (Yes / No):** Set to 'is any value'.
- Programs Full Name:** Set to 'contains' with the value 'CCP Housing Maintenance (S) 3192 (S)'.
- Release of Information End Date:** Set to 'is in range' from 2019-07-01 to 2019-09-30.
- Release of Information Is Latest ROI System Web?** Set to 'is equal to' with a value of 'Yes/No'.
- Update/Exit Custom [CCP] Agency Providing Case Management:** Set to 'is equal to'.

Below the filters is a table titled 'CCP Expiring ROI's' with columns for Agency Name, Program Name, Release of Information End Date, ICM Program, ICM Case Manager, and Update/Exit Custom [CCP] Agency Providing Case Management. The table contains several rows of data.

**Have Additional Questions?**

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