

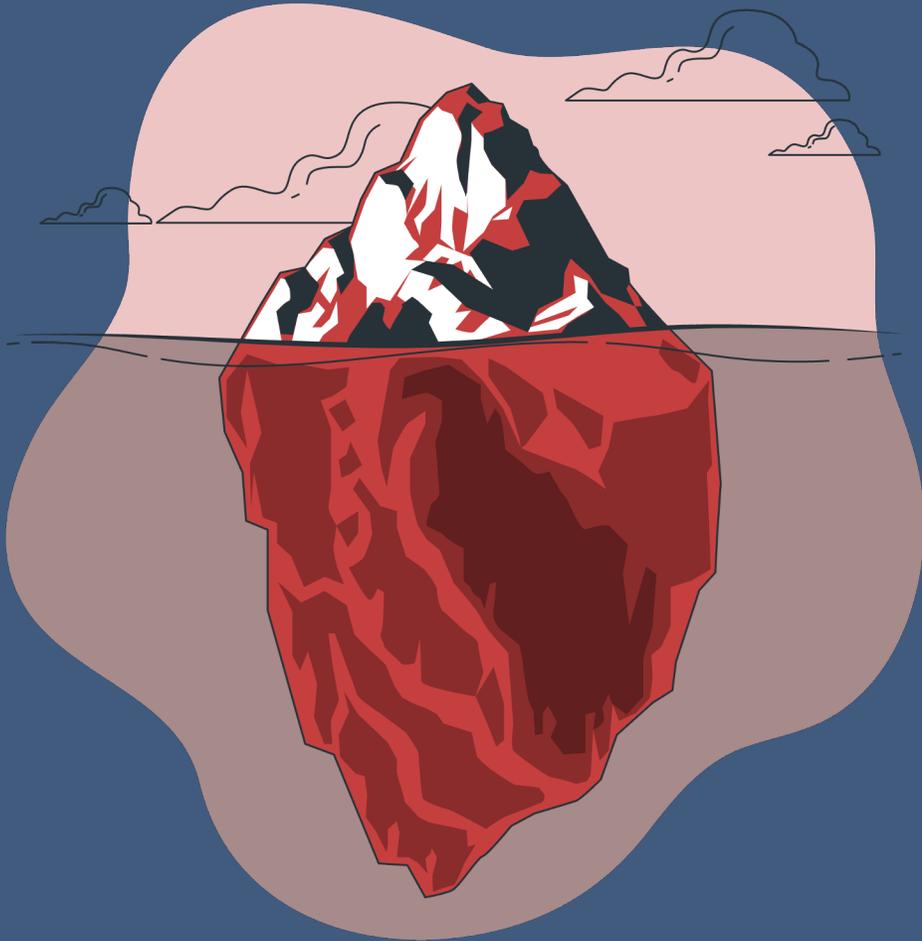


Bitfocus



**DATA ENGAGEMENT WORKSHOP (DEW)
DATA QUALITY & AB 977
Tuesday, July 18th, 2023**

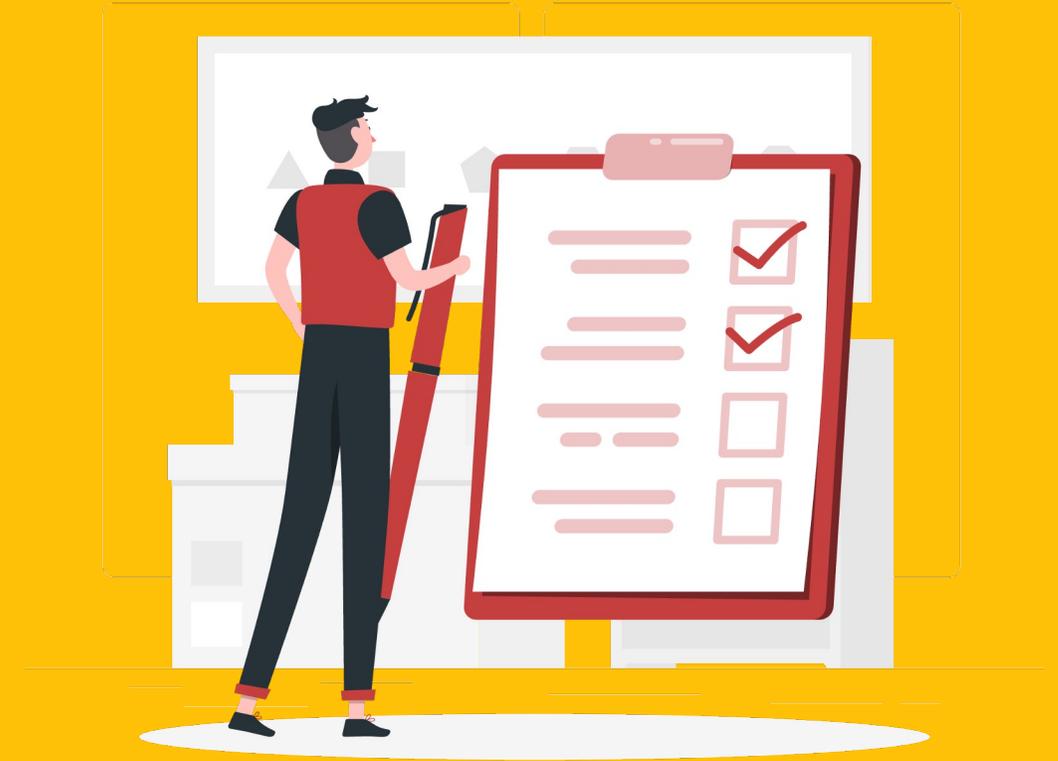
Ice Breaker



What bucket list item would you most want to check off in the next 6 months?

Agenda

- ⇒ Objective
- ⇒ Housekeeping
- ⇒ Key Components of AB 977
- ⇒ Elements of Good Data Quality
- ⇒ Identifying Data Errors
- ⇒ Fixing Data Errors
- ⇒ Practice! (15 Minute Activity)
- ⇒ Useful Resources



Objective



Ensure that TA/Agency Leads and Program Managers have a clear understanding of AB 977 requirements and can identify data quality issues and reporting requirements

Housekeeping

Q&A will be provided at the end of each section

- Please hold all questions until then – or drop them into the chat

Please mute yourself

Slides will be provided via email and on the

[SCC HMIS Website](#) within a week



Key Components of AB 977



Key Components of AB 977 - Overview

What is it? AB977 is a California Assembly bill requiring that grantees and entities of specified state homelessness programs, started on or after July 1st, 2021, must enter specific data elements into their local HMIS

Programs:

- Cal ICH Homeless Housing, Assistance, and Prevention Program (HHAP)
- *Cal ICH Encampment Resolution Funding (ERF) Program**
- *Cal ICH Family Homelessness Challenge (FHC) Grants**
- CDSS Bringing Families Home (BFH)
- CDSS CalWORKs Housing Support Program (HSP)
- CDSS Housing and Disability Income Advocacy Program (HDAP)
- *CDSS Home Safe (CDSS)**
- HCD Homekey
- HCD Housing for a Healthy California Program (HHC)
- HCD No Place Like Home Program (NPLH)
- HCD Multifamily Housing Program (MHP)
- HCD Veterans Housing and Homeless Prevention Act (VHHP)
- CCCCO Community Colleges Homeless and Housing Insecure Pilot Program (HHIP)



**Please see additional guidance about these program requirements in the [FAQ: AB 977 May 26, 2023](#)*

Key Components of AB 977 - Funding Sources

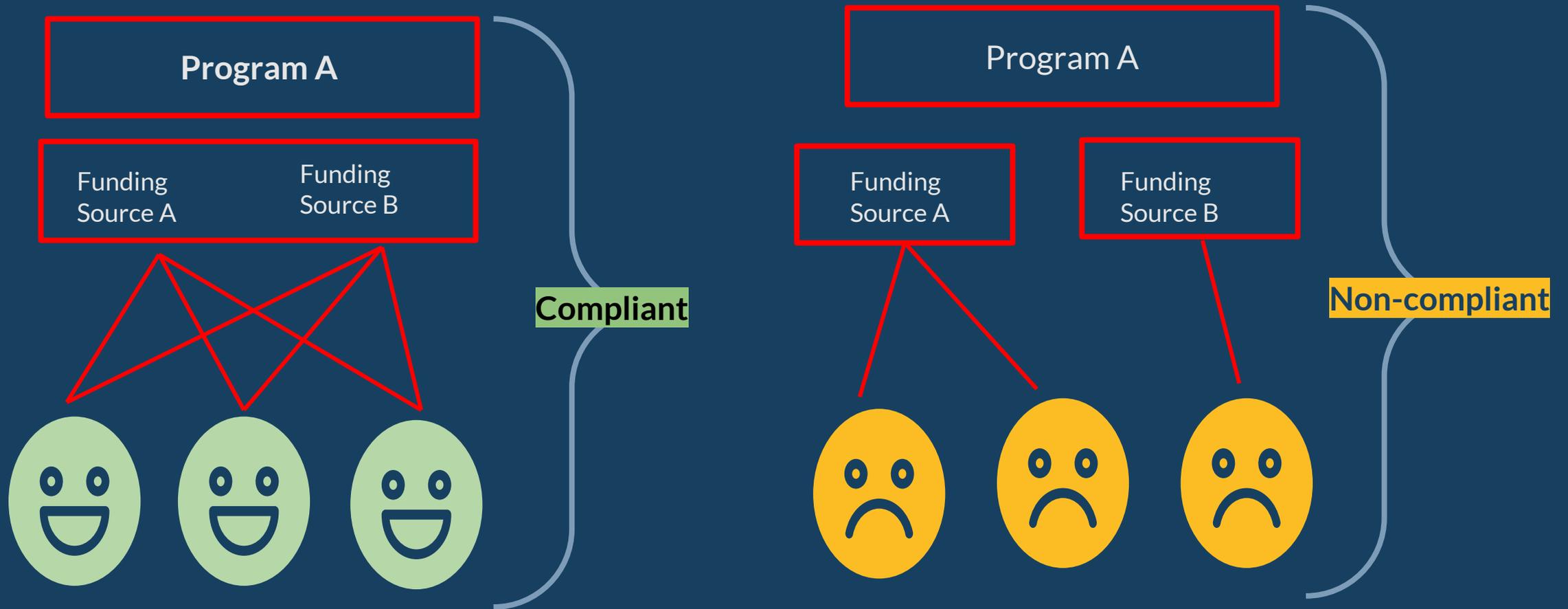
Required Funding Elements: All recipients, subrecipients, and entities operating AB 977 projects are required to comply with the HMIS project setup requirements set forth in the HUD HMIS Data Standards as well as the additional requirements outlined in the AB 977 HMIS Project Setup Instructions provided to recipients.

The funding source will be designated for all clients in the program and therefore the program cannot have co-mingled clients.

Grant Identifier	Start Date	End Date	Adjustment	Total Grant Amount	Created Date
2nd funding source ★	09/20/2021	(not set)	0.00	0.00	09/20/2021

Funding Source will coordinate with HMIS Data Elements and apply to ALL clients in the program

Key Components of AB 977 - Funding Sources



Key Components of AB 977 - Data Elements

Required Project Elements

- **Universal Data Elements:** UDEs should be collected for all existing and new clients enrolled in AB 977 programs. All UDEs are included on the HUD Standard Intake enrollment screen template available in Clarity.
- **Common Data Elements:** Depending on project type, additional data elements are required. Common Data Elements for AB 977 projects match the HUD setup guidance as outlined in the HUD Data Standards.

Key Components of AB 977 - Universal Data Elements (UDEs)

Universal Data Element requirements vary by project type and household member

Example requirements

- **Name** is required for all household members for all project types
- **Veteran Status** is required for all adults in all project types
- **Housing Move-in Date** is required for heads of households in permanent housing projects

Grantees creating new projects should enter UDEs for clients who are actively enrolled when the project is created (deadline: July 1, 2023)

Grantees do not need to enter data for clients who exited before the project was set up in HMIS

Key Components of AB 977 - Common Data Elements (CDEs)

Common Data Elements are collected for most programs participating in HMIS

- Data elements are collected at different stages of enrollment. For example: income is collected at project start, anytime a client provides an update to a caseworker, annual assessments, and at project exit
- Grantees creating new projects do not need to enter the CDEs as of project start for clients who entered the program before the project was created, but they will need to enter **CDEs for all clients that enroll on or after July 1, 2023**
 - *Example: a grantee creates a new project and enters active clients on July 1, 2023. The grantee does not need to enter their clients' incomes at project start for anyone who who entered before July 1, 2023, though they will need to enter the UDE's for all clients active on July 1, 2023*

TOPIC - Pop Quiz!

If you have AB 977 as a funding source, what subset of the population in your program can you use the funding source for?

- A) All Clients in my program will have the AB 977 funding source
- B) Only clients in my program who meet the eligibility requirements
- C) 50% of the clients will have the funding source applied



TOPIC - Pop Quiz!

Question: *If you have AB 977 as a funding source, what subset of the population in your program can you use the funding source for?*

Answer: All clients enrolled in a project during a funding source's period of performance will be counted in funding-source specific reports generated from HDIS for the purposes of AB 977 compliance. If the population group is not covered by the grant, they should not be entered into the program in HMIS.



Elements of Good Data Quality



4 Elements of Good Data Quality

01

COMPLETENESS

No Missing Data

HMIS records include all data elements to create a full record without missing data

- Data Not Collected
- No Exit Interview
- No Annual/Status Assessment

Missing Data

4 Elements of Good Data Quality

02

TIMELINESS

Representing
Current
Services

- The period between when client data is collected/known, and when that information is entered into HMIS.
- Allows system to be used for “real-time” picture of homeless service system and coordinated entry referrals.

Recommended Time Frames by Program Type (As recommended in SOPs)

- ✓ **TH/PSH** - Enter all program entry/exit data within three (3) workdays
- ✓ **ES and non-HUD** - Enter check in/checkout within one (1) workday
- ✓ **Outreach** - Create client profile, if necessary, within three (3) workdays & record Outreach Services within one (1) workday

4 Elements of Good Data Quality

03

ACCURACY

True &
Correct
Information

- Data reflects reality and follows guidelines
- Nothing is fictitious/made up/incorrect
- Direct entry data is double-checked
- Missing values are standardized
- Data entry procedures are followed

4 Elements of Good Data Quality

04

CONSISTENCY

Same definitions
and practices

- Two or more values in different locations are identical
- Make only needed or required changes
- When making changes ensuring the appropriate staff is aware
- Have a clear understanding of what results are expected
- Data entry procedures are followed

TOPIC - Pop Quiz!

What are the 4 Elements of Good Data Quality (DQ)?



TOPIC - Pop Quiz!

Question: What are the 4 elements of good data quality?

- 1. Completeness** - *No missing data*
- 2. Timeliness** - *Representing current services*
- 3. Accuracy** - *True and correct information*
- 4. Consistency** - *Same definitions and practices*



Identifying Data Errors

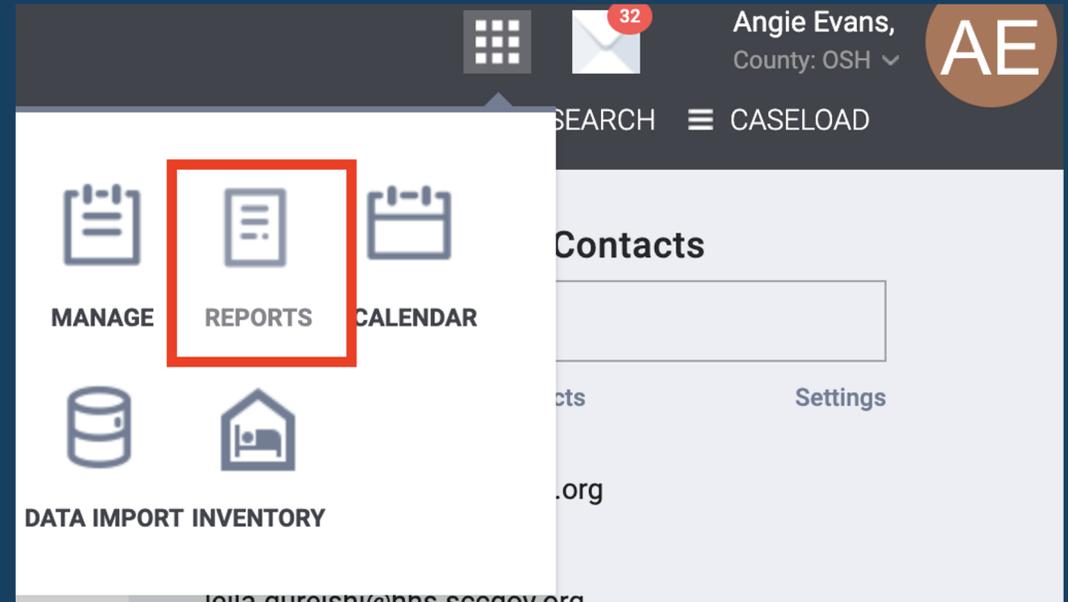


Identifying Data Errors - Running Reports

Log Into Clarity Human Services

Ensure you have access to the correct Agency you want to run the report for

Access the Report Library



Identifying Data Errors - Running Reports

REPORT LIBRARY		
Favorite Reports	Reports you have selected to “favorite”	0 report(s) ▼
HUD Reports	Reports required for HUD Reporting	8 report(s) ▼
Data Quality Reports	Reports designed to assist in Data Quality reviews	6 report(s) ▼
Administrator Reports	Reports only available to staff with Admin Access Role rights in HMIS	36 report(s) ▼
Service Based Reports	Reports on Services in HMIS	13 report(s) ▼
Program Based Reports	Reports on Program Details in HMIS	22 report(s) ▼
Assessment Based Reports	Reports on CE Assessments, such as a VI-SPDAT	4 report(s) ▼
Profile Screen Reports	List of each client's responses on Entry/Exit Screens	1 report(s) ▼
Housing	Housing census reports	5 report(s) ▼
Community and Referrals	Review CE Referrals to/from your agency	8 report(s) ▼
Agency Specific	Reports created for your agency	11 report(s) ▼
Agency Management	Staff or agency based reports	4 report(s) ▼

Identifying Data Errors - Running Reports

Data Quality Reports

Clarity has several Data Quality reports built into the Report Library to assist with general Data Quality concerns

To learn more about each report you may search for the report in [HelpDesk](#), or click More Info to see a link to HelpDesk articles on the report

To Run the report, click Run and select your parameters (Example: a timeframe or program)

Data Quality Reports	6 report(s) ^		
[DQXX-102] Program Data Review	★ ▶ RUN	📅 SCHEDULE	MORE INFO ▾
[DQXX-103] Monthly Staff Report	★ ▶ RUN	📅 SCHEDULE	MORE INFO ▾
[DQXX-110] Duplicate Clients	★ ▶ RUN	📅 SCHEDULE	MORE INFO ▾
[DQXX-121] Project Start Date > Project Exit Date	★ ▶ RUN	📅 SCHEDULE	MORE INFO ▾
[DQXX-122] Duplicate Assessments Report	★ ▶ RUN	📅 SCHEDULE	MORE INFO ▾
[GNRL-242] Client Project Stay Issues	★ ▶ RUN	📅 SCHEDULE	MORE INFO ▾



Identifying Data Errors - Data Quality Reports

[DQXX-102] Program Data Review

- Description and directions [here](#)
- Will show you clients Entry/Exit Date, Active days in a program, and Missing Entry/Exit Data.

[DQXX-103] Monthly Staff Report

- Description and directions [here](#)
- Identifies staff who may have repeated errors and need additional support in data entry

Identifying Data Errors - HUD Reports

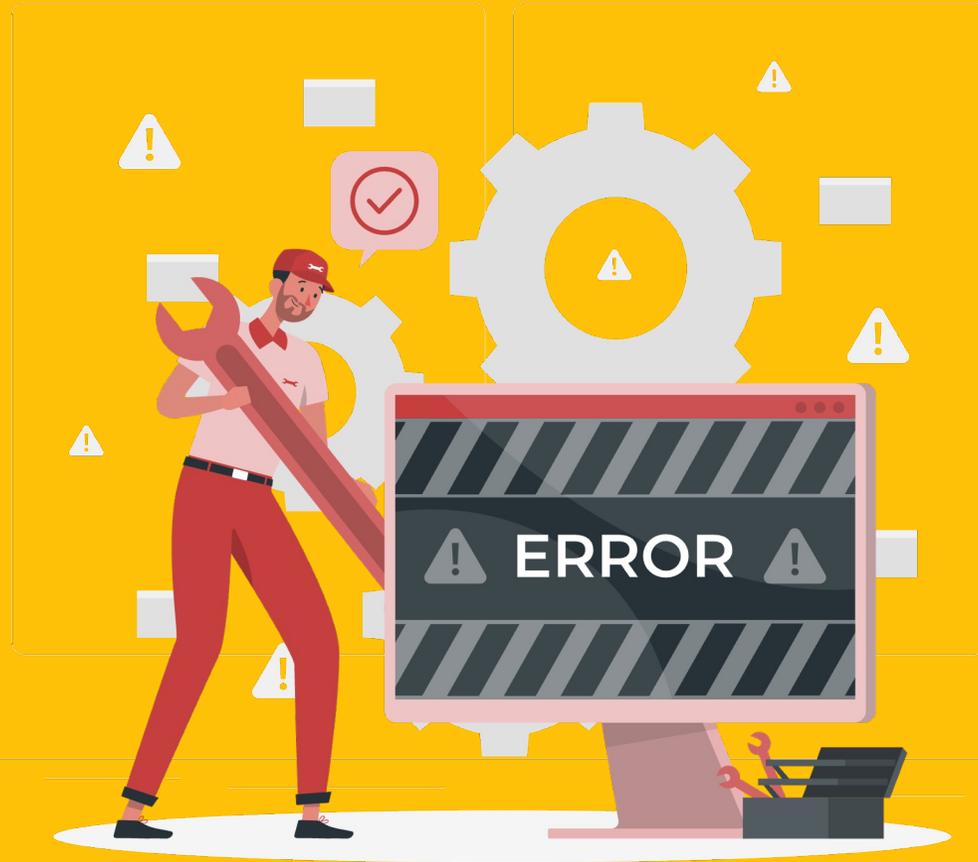
★ [HUDX-225] HMIS Data Quality Report ★

- Description and directions [here](#)
- This HUD report reviews data quality across a number of HMIS data elements
- Reviews client data entry error trends and can be run for entire agency or single program
- Recommended as a prerequisite for [HUDX-227](#)

[HUDX-227] Annual Performance Report

- Description and directions [here](#)
- Also available to run in Admin and Agency level version
- Recipients of HUD Continuum of Care (CoC) funding (e.g., Supportive Housing Program, Shelter Plus Care, Section 8 Moderate Rehabilitation Single Room Occupancy Program, CoC Program) are required to submit an Annual Performance Report (APR) electronically to HUD every operating year
- Data collection for the APR is aligned with the most recent version of the [Homeless Management Information System \(HMIS\) Data Standards](#). The [APR portal](#) contains a wealth of information for grantees

Fixing Data Errors



Fixing Data Errors - Interpreting the Data

[HUDX-225] HMIS Data Quality Report

- Description and directions [here](#)
- This HUD report reviews data quality across a number of HMIS data elements.
- Reviews client data entry error trends and can be run for entire agency or single program
- This report can be found in the following locations in the Report Library:
 - HUD Reports → [HUDX-225] HMIS Data Quality Report
 - Administrator Reports → [HUDX-225-AD] HMIS Data Quality Report

REPORT LIBRARY EXPLORE DATA ANALYSIS

REPORT LIBRARY

Favorite Reports 0 report(s) ▾

HUD Reports 8 report(s) ▲

v3.6 [HUDX-224] PATH Annual Report [FY 2022]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-111] HUD CSV / XML Program Data Export [FY 2022]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-225] HMIS Data Quality Report [FY 2023]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-227] Annual Performance Report [FY 2023]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-228] ESG CAPER [FY 2023]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-231] LSA Export - Project-Focused LSA [FY 2022]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-235] CE APR [FY 2023]	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-236] LSA - Project Descriptor HDX Upload Test [FY 20...	★ ⏱ RUN 📅 SCHEDULE MORE INFO ▾

Fixing Data Errors - Interpreting the Data

Setting Report Parameters

1. **Switch Access Agency:** Choose Agency
2. **CoC Filter Category:** The report will only pull from Agencies with the selected CoC
3. **CoC:** Should be Santa Clara County
4. **Project Types:** Choose which project types to include from the list of options or select ALL
5. **Program Status:** Select from options of All, Active Programs or Inactive Programs
6. **Continuum Project:** Select from the options All and/or Yes
7. **Programs:** Choose which programs to include from the options of All, Single Select, or Multi-Select (hold control/command or hold shift to select multiple options)

REPORT LIBRARY

HUD Reports > [HUDX-225] HMIS Data Quality Report [FY 2023]

Switch Access Agency(-ies)	1	Choose... All System Abode Services Amigos de Guadalupe Anthem Blue Cross
CoC Filter Category	2	Agency CoC
CoC	3	Santa Clara County CoC
Project Type(s)	4	Choose... All Emergency Shelter Transitional Housing PH - Permanent Supportive Housing (disability required for entry)
Program Status	5	All Programs
Continuum Project	6	All
Program(s)	7	Choose...

Fixing Data Errors - Interpreting the Data

Setting Report Parameters

The screenshot shows a report configuration interface with the following fields and callouts:

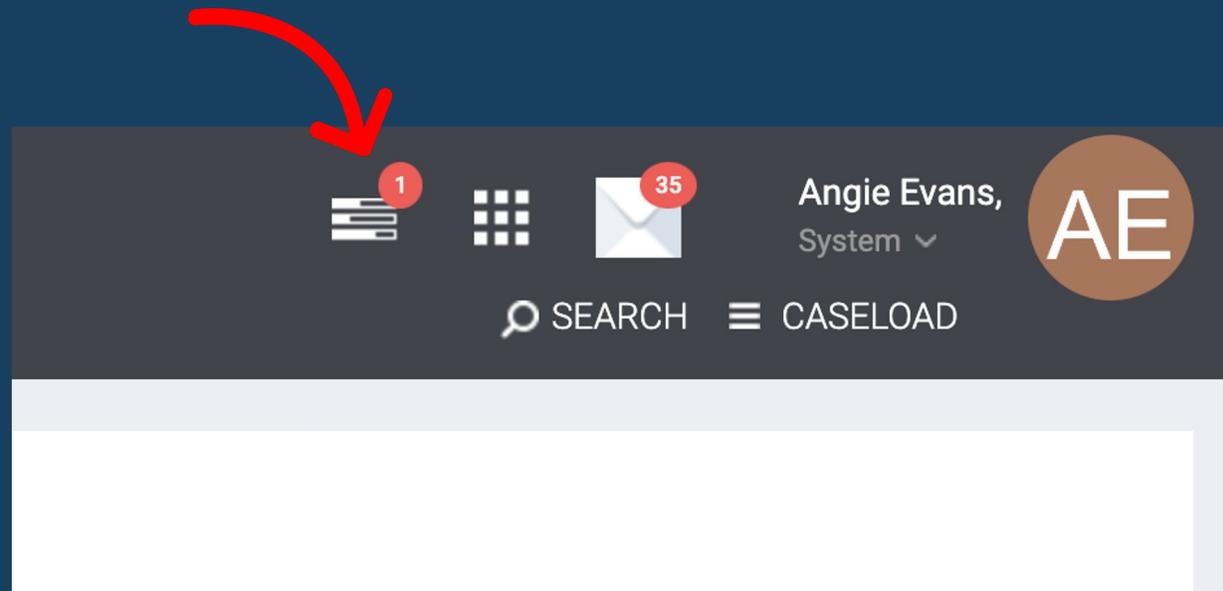
- Program(s):** A dropdown menu with options: Choose..., All, Casa De Novo Interim (IH) (highlighted), HDAP Bella Vista Interim Housing (IH), and HDAP Bella Vista Interim Housing Project 1 (IH).
- Report Date Range:** A date range selector showing 01/01/2023 to 06/30/2023. Callout 1 is placed over the date range.
- Report Output Mode:** A dropdown menu currently set to "Regular Report". Callout 2 is placed over the dropdown.
- Report Output Format:** A row of radio buttons for "Web Page" (selected), "PDF", "Excel", and "Zip with XLSX". Callout 3 is placed over the "Web Page" radio button.
- Drilldown Output Format:** A row of radio buttons for "Web Page" (selected), "PDF", and "CSV". Callout 4 is placed over the "Web Page" radio button.

A "SUBMIT" button is located at the bottom right of the form.

- 1. Report Date Range:** Choose the date range of enrollments to include
 - TIP: If the program enrollment ends on a date during or after the reporting period, the report will include that client record
- 2. Report Output Mode:** Regular and Details
 - Regular Report = Web Page and PDF options
 - Details Report only available as Zip with XLSX format
- 3. Report Output Format:** Select from the options of Webpage, PDF, Excel
- 4. Drilldown Output Format:** Select frp, the options of WebPage, PDF, CSV
 - TIP: If you run with the selected output of "Web Page" then you can click on each of these numbers to identify and correct client records

Fixing Data Errors - Interpreting the Data

When the report is ready, a new number will appear in your Report Queue folder in Clarity



Fixing Data Errors - Interpreting the Data

HMIS Data Quality Report [FY 2023]		CoC Category Filter: Program CoC Date Range: 01/01/2022 thru 12/31/2022	
Q1. Report Validation Table			
Program Applicability: All Projects			
Category	Count of Clients for DQ	Count of Clients	
Total number of persons served	2,821	2,849	
Number of adults (age 18 or over)	2,547	2,573	
Number of children (under age 18)	241	243	
Number of persons with unknown age	33	33	
Number of leavers	151	151	
Number of adult leavers	136	136	
Number of adult and head of household leavers	143	143	
Number of stayers	2,670	2,698	
Number of adult stayers	2,411	2,437	
Number of veterans	417	418	
Number of chronically homeless persons	417	419	
Number of youth under age 25	380	394	
Number of parenting youth under age 25 with children	3	3	
Number of adult heads of household	1,180	1,192	
Number of child and unknown-age heads of household	53	53	
Heads of households and adult stayers in the project 365 days or more	1,167	1,177	

If the program enrollment ends on a date during or after the reporting period, the report will include that client record.

This section of the report provides numerical details on clients and demographics in your selected programs. This may be useful in reporting to funders and/or public entities.

Fixing Data Errors - Interpreting the Data

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)	0	1	1	4.35%
Social Security Number (3.2)	9	0	5	30.43%
Date of Birth (3.3)	0	1	1	4.35%
Race (3.4)	2	2		8.7%
Ethnicity (3.5)	2	2		8.7%
Gender (3.6)	0	0		0%
Overall Score				36.96%

Provides details on Data Quality for client creation, including UDEs required by AB 977

Q3. Universal Data Elements			
Program Applicability: All Projects			
Data Element		Error Count	% of Error Rate
Veteran Status (3.7)		3	8.11%
Project Entry Date (3.10)		0	0%
Relationship to Head of Household (3.15)		4	8.7%
Client Location (3.16)		2	6.25%
Disabling Condition (3.8)		2	4.35%

Provides details on Data Quality for Program Enrollment, including UDEs required by AB 977

TIP: Using the Drill Down you can click on the number to find out which clients are included in the data quality error

Fixing Data Errors - Interpreting the Data

Q4. Income and Housing Data Quality		
Program Applicability: All Projects		
Data Element	Error Count	% of Error Rate
Destination (3.12)	14	30.43%
Income and Sources (4.2) at Start	6	11.76%
Income and Sources (4.2) at Annual Assessment	0	0%
Income and Sources (4.2) at Exit	18	46.15%
Non-Cash Benefits (4.3) at Start	6	11.76%
Non-Cash Benefits (4.3) at Annual Assessment	0	0%
Non-Cash Benefits (4.3) at Exit	18	46.15%

Provides details on Data Quality for Program Enrollment, including UDEs and CDEs required by AB 977

Q5. Chronic Homeless							
Program Applicability: ES, SH, Street Outreach, TH & PH(All)							
Starting into project type	Count of total records	Missing time in institution (3.917.2)	Missing time in housing (3.917.2)	Approximate Date started (3.9.17.3)	Number of times (3.9.17.4)	Number of months (3.9.17.5)	% of records unable to calculate
				Missing	DK/R/missing	DK/R/missing	
ES, SH, Street Outreach	7			0	0	0	0%
TH	0	0	0	0	0	0	0%
PH (all)	0	0	0	0	0	0	0%
Total	7						0%

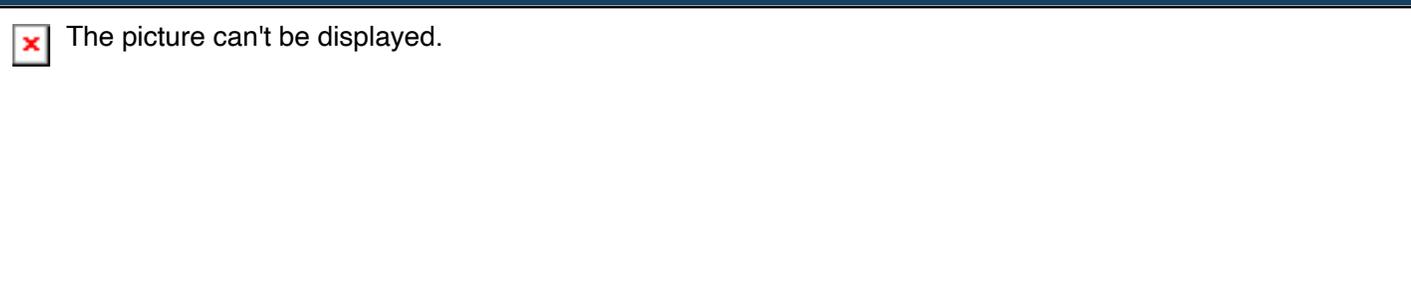
DK/R/missing = Client Responded Don't Know, Refused, or Data Not Collected/Missing from dataset

Fixing Data Errors - Interpreting the Data

Q6. Timeliness		
Program Applicability: All Projects		
Time for Record Entry	Number of Project Start Records	Number of Project Exit Records
0 days	14	6
1-3 days	3	0
4-6 days	1	0
7-10 days	2	0
11+ days	10	2

Counts of the days between when a client enters or exits a program ([project entry date] and [project exit date]) and when the record of that entry or exit is created in HMIS ([date created] (timestamp)).

For example, if a client's **exit date** was 2 days ago and the user is exiting the client **today in HMIS**, then that client's project exit record will be counted in the "1-3 days" category.



DK/R/missing = Client Responded Don't Know, Refused, or Data Not Collected/Missing from dataset

Fixing Data Errors - Fixing Errors

 The picture can't be displayed.

The Q7 Inactive Records table reports how many street outreach and night-by-night shelter enrollments appear to be inactive (i.e. should have been exited but were not). Enrollments are considered inactive when there's been no contact with or bed night activity for the client within 90 days.

Fixing Data Errors - Drill Down Option

Drilldown functionality is available for each section of the report and contains a list of clients with Unique Identifier, Client Name, SSN, Date of Birth, Program, Start Date, End Date, and Assigned Staff

If you click on the number, this is what the list will look like

HMIS Data Quality Report [FY 2022]
Q4. Income and Housing Data Quality
Income and Sources (4.2) at Annual Assessment - Error Count

List of Clients

Unique Identifier	Name	SSN	Date Of Birth	Program	Start Date	End Date	Assigned Staff
1	John Doe	123-45-6789	1/1/1980	Substance Use Treatment	1/1/2021	-	John Doe
2	Jane Smith	987-65-4321	2/2/1985	Substance Use Treatment	2/2/2021	-	Jane Smith
3	Mike Brown	555-44-3322	3/3/1990	Substance Use Treatment	3/3/2021	-	Mike Brown
4	Emily White	111-22-3344	4/4/1995	Substance Use Treatment	4/4/2021	-	Emily White
5	David Green	666-77-8899	5/5/2000	Substance Use Treatment	5/5/2021	-	David Green
6	Alice Black	333-44-5566	6/6/2005	Substance Use Treatment	6/6/2021	-	Alice Black
7	Bob Gray	222-33-4455	7/7/2010	Substance Use Treatment	7/7/2021	-	Bob Gray

of Persons: 7
of Households: 7

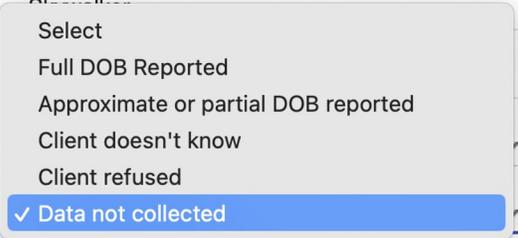
*Note: * denotes Inactive Assigned Staff*

Fri May 13 06:28:15 AM 2022 1 / 1

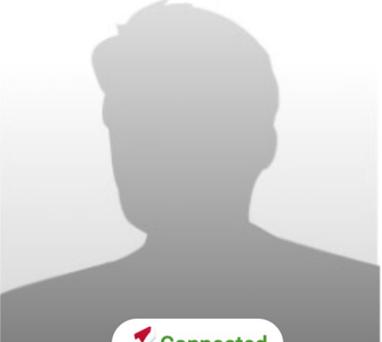
Powered By 

Fixing Data Errors

CLIENT PROFILE TEST CLIENT

Social Security Number	XXX - XX - 7391
Quality of SSN	Full SSN Reported
Last Name	
First Name	
Quality of Name	
Quality of DOB	
Middle Name	Suffix None
Alias	
Gender	Female
Race	American Indian, Alaska Native, or Indigenous
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x)
Pronouns	Select

Client is Deceased



 Connected

UNIQUE IDENTIFIER
53DA21C1D

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Community Housing Queue

[VIEW DETAILS](#)

[SEND MESSAGE](#)

Most Staff Access Roles allow staff to Edit Client Profile and Enrollment/Exit data

In some cases, staff will need to work with the Agency Lead in order to make the changes

OR Staff can contact the Help Desk for assistance at sccsupport@bitfocus.com

Hands-on Learning/Practice

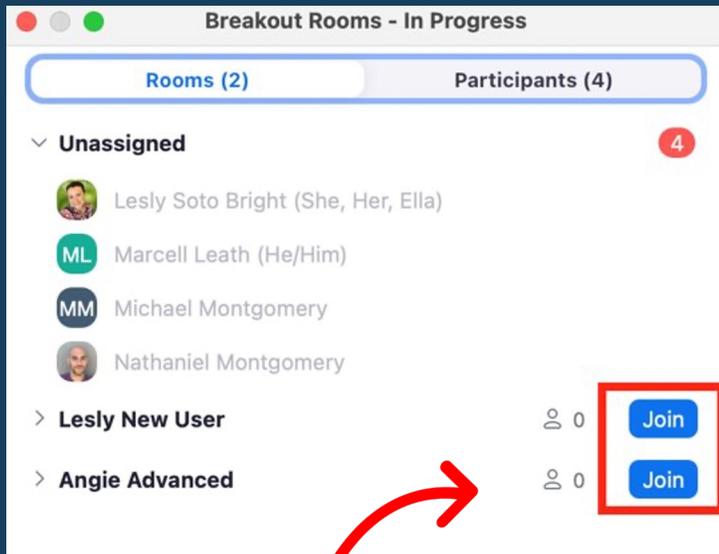


Ground Rules for HMIS Practice in Zoom

- Do not share your screen from the Live Site
- Client data should not be shared via Zoom unless it is to review with other staff at your agency who have similar access to that client's record
- To share client information, provide the Unique ID for the client
- To share report specification questions, use the Training Site at scc-train.clarityhs.com - *Your facilitator will have access to it if you don't!*

Practicum!

Running the Program Data Review Report (10 Mins in Rooms)



Self select your level and click Join on the group

- Breakout Groups
 - a. New User Groups (2 Facilitators: Lesly and Nate)
 - b. Intermediate User (2 Facilitators: Michael and Marcell)
 - c. Advanced User (1 Facilitator: Angie)
- Identify 1 program at your Agency with active clients
- Run the Program Data Review Report

Step-by-Step: Program Data Review Report

- Decide on 1 program or more to run the report
- Find where the Report is located in the Reports tab (*Hint: it's under the Data Quality Reports*)
- Setup the parameters to include that Program Name
- Setup the parameters to include All Active clients
- Setup the parameters to include the Output Format: Web Page
- Click Submit
- Review the report once it has completed running

REPORT LIBRARY

Data Quality Reports > [DQXX-102] Program Data Review

Program

Status

Report Output Format Web Page PDF Excel

Note: If the report contains more than 10,000 rows, the Report Output Format will be automatically changed to Excel

Things to Consider When Running the Report

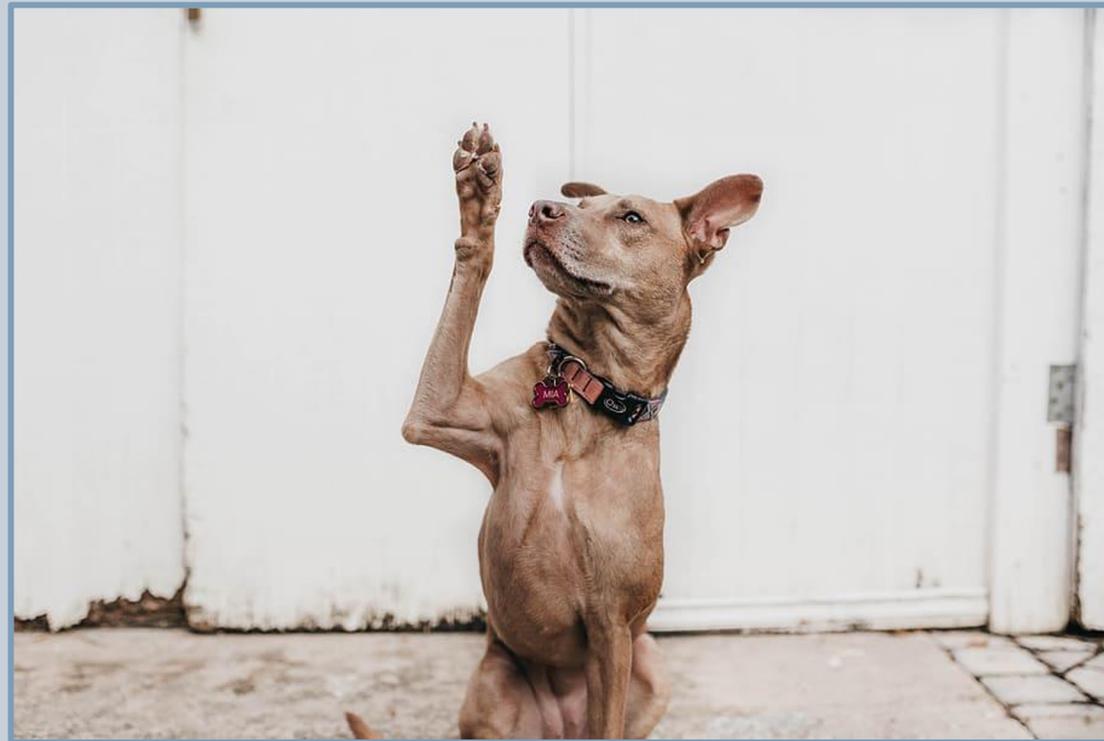


Discussion Topics

- a. Where is this report found in the Report Library?
- b. Does this report require a Program Enrollment or only a Profile creation? (*ie. where does the data come from*)
- c. Is this report color coded? Why do you think that is?
- d. Did you use the drill down option?

Reminder: Click on Join to select your breakout room. At the end, you will want to [return to Main Room](#) to join the final discussion

What questions came up in your breakout room?



Want to learn more...check these out

Clarity Human Services Help Center

Hello. How can we help? Search for answers here!

Bitfocus Training

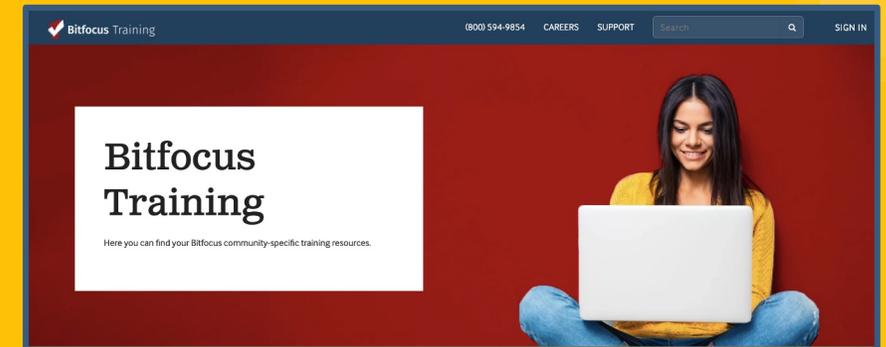
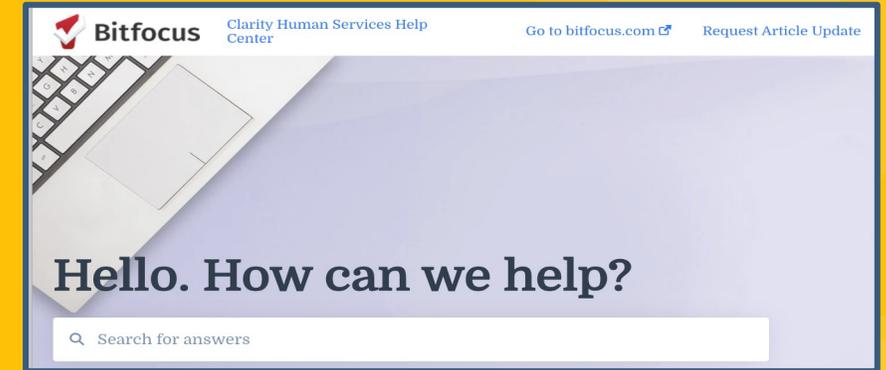
Here you can find your Bitfocus community-specific training resources

The Report Library

Find detailed information about reports, including the source of each data point as well as guidance on drill-down functionality and parameters.

California AB 977 Support Materials

To support our California customers, Bitfocus has produced the following resources for use in HMIS configuration alignment with California Assembly Bill No. 977 specifications.



Questions - Here's How to Contact Us...

SCC HMIS Website: scc.bitfocus.com

SCC HMIS Help Center Support Email:

sccsupport@bitfocus.com

SCC HMIS Help Center Support Desk Phone:

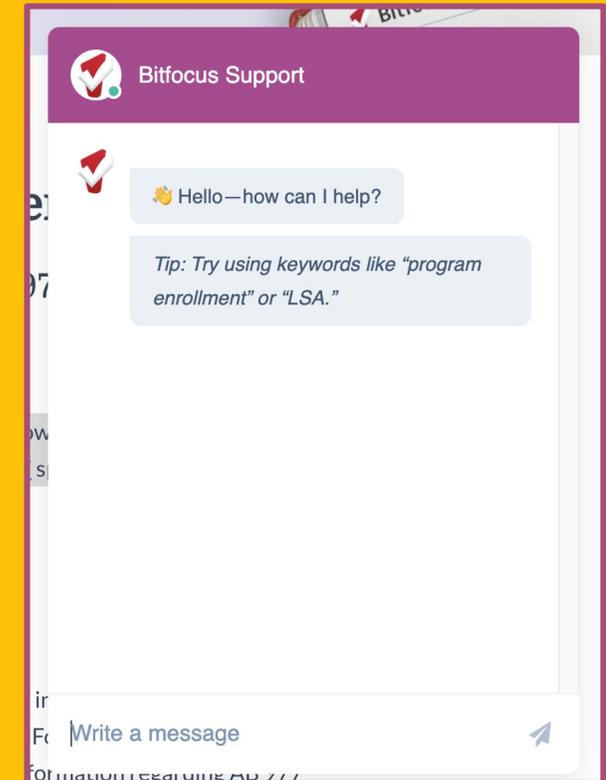
- (408) 596.5866 EXT. 2

Your Sys. Admin Team: scc-admin@bitfocus.com

Looker and Clarity Office Hours every week

<https://scc.bitfocus.com/events>

Use the CHAT FEATURE





Thank You!

Please help us improve these trainings by completing this post-event survey before you go: <https://forms.gle/gVJzkpupjDcaUpoz8>