

Data Literacy Institute

HMIS Starter Kit

August 2, 2018



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.



Agenda

- Report Library
- Data Analysis and Explore
- Embedded Dashboards
- Best Practices

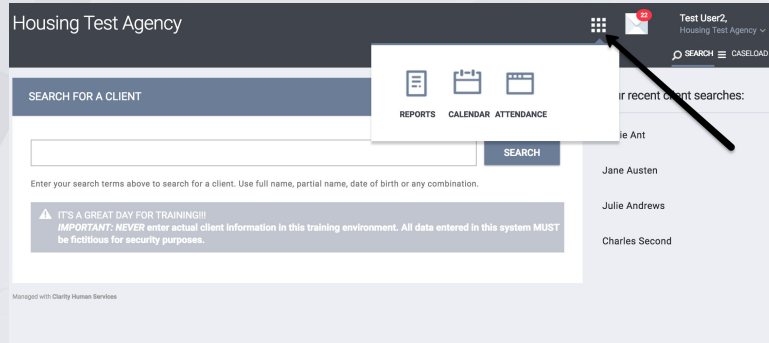


Report Library

Existing Programmed Reports

General Information

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



Demographics & Outcomes

Focus on:

- [HUDX-227] Annual Performance Report [Oct 2017]
- [GNRL-220] Program Details Report
- [OUTS-205] Program Recidivism

Annual Performance Report (APR)

- **Report Name**
 - [HUDX-227] Annual Performance Report [Oct 2017]
- **Where to find it:**
 - HUD Reports folder
- **Useful for:**
 - Overall client and household counts
 - Demographics (race, ethnicity, age, etc)
 - Outcomes (increases in income, destination)
- **Tips / Notes:**
 - Includes tables with demographic and outcome information for subpopulations (Veterans - Q25, Chronic Homeless - Q26, Youth - Q27)
 - For Street Outreach, includes number of clients contacted & engaged - Q9
 - For RRH, includes days to housing - Q22c
 - Report contents are specified by HUD



Q5a. Report Validations Table

Program Applicability: All Projects

Total number of persons served	26
Number of adults (age 18 or over)	17
Number of children (under age 18)	
Number of persons with unknown age	

Number of leavers	
Number of adult leavers	
Number of adult and head of household leaver	
Number of stayers	
Number of adult stayers	
Number of veterans	
Number of chronically homeless persons	
Number of youth under age 25	
Number of parenting youth under age 25 with	
Number of adult heads of household	
Number of child and unknown-age heads of	
Heads of households and adult stayers in the	

Q19a3. Client Cash Income Change - Income Source - by Start and Latest Status/Exit

Program Applicability: All Projects

Income Change by Income Category (Universe: Adult Stayers with Income Information at Start and Annual Assessment/Exit)	Had Income Category at Start and Did Not Have It at Annual Assessment/Exit	Retained Income Category But Had Less \$ at Annual Assessment/Exit Than at Start	Retained Income Category and Same \$ at Annual Assessment/Exit as at Start	Retained Income Category and Same \$ at Annual Assessment/Exit as at Start	Did Not Have the Income Category at Start and at Annual Assessment/Exit	Did Not Have the Income Category at Start and at Annual Assessment/Exit	Total Adults (including those with no income)	Performance Measure: Adults who Gained or Retained Income	Performance Measure: Percent of persons who were homeless at start
Number of Adults with Earned Income (i.e., Employment Income)	0	0	0						
Average Change in Earned Income	0.00	0.00							
Number of Adults with Other Income	0	0	2						
Average Change in Other Income	0.00	0.00							
Number of Adults with Any Income (i.e., Total Income)	0	0	2						
Average Change in Overall Income	0.00	0.00							

Q23b. Exit Destination - 90 Days or less

Program Applicability: All Projects

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Permanent Destinations					
Moved from one HOPWA funded project to HOPWA PH	0	0	0	0	0
Owned by client, no ongoing housing subsidy	1	0	1	0	0
Owned by client, with ongoing housing subsidy	0	0	0	0	0
Rental by client, no ongoing housing subsidy	2	0	2	0	0
Rental by client, with VASH housing subsidy	0	0	0	0	0
Rental by client, with GPD TIP housing subsidy	0	0	0	0	0
Rental by client, with other ongoing housing subsidy	0	0	0	0	0
Permanent housing (other than RRH) for formerly homeless persons	0	0	0	0	0
Staying or living with family, permanent tenure	0	0	0	0	0
Staying or living with friends, permanent tenure	0	0	0	0	0
Rental by client, with RRH or equivalent subsidy	0	0	0	0	0
Subtotal	3	0	3	0	0

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. Useful for calculating using Excel or by hand.



	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
1	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
2	Annette	Marsh	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/18/2016		N	Case Management: Case Management	10/11/2016	10/11/2016	1986-04-04
3	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
4	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
5	Bob	Marsh	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/18/2016		N	Case Management: Case Management	10/07/2016	10/07/2016	2012-08-08
6	Daf23229E	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
7	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
8	Sally	Springs	Housing Test Agency	Alison Wilson	Alison Wilson	06/22/2018		N	Case Management: Case Management	10/05/2016	10/05/2016	1980-03-01
9	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
10	Sammy	Springs	Housing Test Agency	Alison Wilson	Alison Wilson	06/22/2018		N	Case Management: Case Management	10/05/2016	10/05/2016	2010-04-24
11	Sammy	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/05/2016	09/30/2017	N	Case Management: Case Management	10/11/2016	10/11/2016	2010-04-24
12	Stevie	Sanders	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/10/2016		N	Case Management: Case Management	10/17/2016	10/17/2016	2005-09-09
13	Stevie	Springs	Housing Test Agency	Alison Wilson	Alison Wilson	06/22/2018		N	Case Management: Case Management	10/17/2016	10/17/2016	2010-01-01
14	Stevie	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/07/2016	09/30/2017	N	Case Management: Case Management	10/05/2016	10/05/2016	2008-08-08
15	Susie	Springs	Housing Test Agency	Alison Wilson (deleted)	Alison Wilson (deleted)	10/13/2016		N	Case Management: Case Management	10/05/2016	10/05/2016	2008-08-09
16	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
17												
18												
19												
20												
21												



Program Recidivism

- **Report Name:**
 - [OUTS-205] Program Recidivism
- **Where to find it:**
 - Program-Based Reports folder
- **Useful for:**
 - Quick overview of returns to homelessness from clients exiting ES, TH, RRH, and PSH programs
- **Tips / Notes:**
 - This report does NOT follow the HUD System Performance Measures logic for returns to homelessness



Program Recidivism Report

Bitfocus System

Date Range: 07/01/2016 and 06/30/2018

ES Programs	# of Clients
Number of clients who exited within date range	36
Number of clients who exited to permanent destinations	2
Number of clients returning to homelessness	1
Average number of days from program exit to re-entry	6

PSH Programs	# of Clients
Number of clients who exited within date range	144
Number of clients who exited to permanent destinations	91
Number of clients returning to homelessness	30
Average number of days from program exit to re-entry	120

TH & RRH Programs	# of Clients
Number of clients who exited within date range	19
Number of clients who exited to permanent destinations	2
Number of clients returning to homelessness	0
Average number of days from program exit to re-entry	-



Demographics & Outcomes

- **Comprehensive overview of program demographics and outcomes**
 - [HUDX-227] Annual Performance Report [Oct 2017]
- **Detailed information about program enrollments**
 - [GNRL-220] Program Details Report
- **Returns to homelessness**
 - [OUTS-205] Program Recidivism
- **Client Demographics**
 - [OUTS-106] Client Demographics - for clients enrolled in a specific program
 - [OUTS-105] Client Demographics - for clients who received a specific service
- **Service Counts**
 - [GNRL-104] Service Summary



Program Monitoring

- **Client Enrollments**
 - [GNRL-106] Program Roster
- **Data Quality**
 - [HUDX-225] HMIS Data Quality Report
- **Utilization**
 - [SCC-107] ES/TH Utilization Report
 - [SCC-106] RRH Utilization Report
- **Services and Funding**
 - [GNRL-400] Program Linked Service Review
 - [EXPS-103] Program Funding Source Financial Detail
- **Coordinated Assessment (VI-SPDATs)**
 - [GNRL-401] VI-SPDAT Details
- **Staff**
 - [STFF-103] User Active Caseload



Data Analysis and Explore

Custom Reporting Tool

General Information

- Available for users with Agency Manager license
 - If you are interested in this option but do not have an Agency Manager license, please check with your HMIS Agency Administrator and Bitfocus
- Find it by going to the Report Library, and clicking on the “Data Analysis” and “Explore” tabs
- Training is available on the SCC HMIS site
 - <http://scc.hmis.cc/training/schedule-a-training/>
 - See “Register for Clarity Data Analysis Training” to view a pre-recorded webinar
 - See “Clarity Data Analysis Office Hours” to register for a live Q&A session (held weekly)

Data Analysis Tab

- Contains reports created and saved for Santa Clara County and for your specific agency

The screenshot shows the 'Data Analysis' tab selected in the 'System' header. A red arrow points to the 'DATA ANALYSIS' link in the navigation bar. Below the header, there is a table listing reports:

Built In Reports	1 report(s) ▼
Santa Clara County HMIS Reports	5 report(s) ▼
System Reports	7 report(s) ▼

To the right of the table is the 'CLARITY HUMAN SERVICES' logo. At the bottom right, there are logos for 'Santa Clara County Continuum of Care' and 'Bitfocus'.

Data Analysis: Available Reports

Santa Clara County HMIS Reports folder:

- **Program Monitoring Reports**
 - Clients with Expiring ROIs
 - Data Quality Report
 - Housing Move-In Date Review
 - UPLIFT Clients with More than One Badge or Sticker
- **Outcomes**
 - Housing Placement Report

Data Analysis: Available Reports

Agency Reports folder:

- Reports saved by your Agency Manager or by Bitfocus (at agency request)

Coming soon:

- CCP Data Quality Reports for agencies providing ICM services
 - Program Roster
 - Medical Home/Behavioral Health/Income services
 - Housing Move-In Date
 - Housing Services



Explore Tab

- Allows you to build and save custom reports
- Different models:
 - HMIS Performance
 - based on program enrollments
 - HMIS Population over Time
 - based on program enrollments, focused on longitudinal analysis (e.g. number of clients served each day this month)
 - Services
 - based on services
 - Project Descriptor
 - program set-up details (e.g. inventory, project type, federal funding information)



System

REPORT LIBRARYEXPLOREDATA ANALYSIS

5

5

Jenn Ong,
System

JO

SEARCHCASELOAD

Explore

Run

HMIS Performance

Search

All FieldsDimensionsMeasures

Agencies

Client Addresses

Client Assessment Custom

Client Assessments

Client Notes

Clients

DIMENSIONS

Age Tier

Agency that created Client Profile

Alias

Client Files

Client Full Name

Current Age

Date Created Date

Date of Birth Date

Date Updated

Deleted

FILTERS (1)

Custom Filter

Enrolments Reporting Period Filter

Conditionally Required

is in the past

1

quarters

+

VISUALIZATION

DATARESULTS

Calculations

Row Limit500

Totals

Select some dimensions or measures.

Santa Clara County Continuum of Care

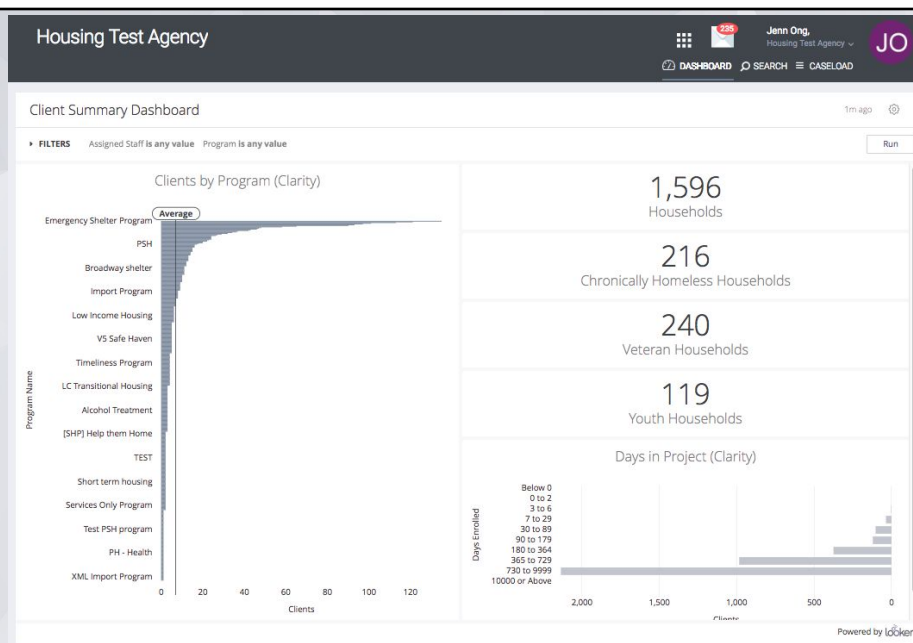
Bitfocus

Embedded Dashboards

(NEW!)

Embedded Dashboards

- New feature coming in late August 2018
- Available to users with an Agency Manager license
- A dashboard of your agency's data will appear when you first log in (instead of the client search screen)
- Agencies will start with a default dashboard with basic data, but can work with Bitfocus to customize the dashboard over time
- More details will be emailed out to Agency Managers this month!



Best Practices

Best Practices

- What reports do you find useful in the Reports Library? Why?
- If you use Data Analysis / Looker - what do you use Looker for? Are there any suggestions you would give others?

Resources

- **Clarity Human Services Help Center**
 - <https://get.clarityhs.help/>
 - Click on “Report Library” for detailed information on reports
 - Click on “Data Analysis” for additional resources on Data Analysis/Explore tabs
- **Bitfocus SCC HMIS Help Desk**
 - sccsupport@bitfocus.com
 - 408.596.5866 x2
- **(Coming Soon) Data Literacy Institute page on the SCC HMIS site**
 - <http://scc.hmis.cc/>



Upcoming Workshops

Aug 23: Useful Reports Training (Agency Staff)

Not familiar with the Clarity Reports Library, or want some tips on what reports to use for demographics, data quality, or services? Join us for a review of useful reports in the Report Library, what data they provide, and how to run them.

Sept 6: HMIS Data in Action (Agency Managers)

Ever wonder what your HMIS data is used for? Join us for an overview of how your data is used for Federal and County reports.

Sept: HMIS Data in Action (Agency Staff) - Date TBA

Ever wonder what your HMIS data is used for? Join us for an overview of how your data is used for Federal and County reports.

