



Tri-County Continuum of Care for Hunterdon, Sussex, & Warren Counties

Coordinator: W. Ricardo Izquierdo
wrizquierdo@familypromisesussex.org

Data Quality Meeting March 19, 2020 at 1:00 PM – 3:00 PM Christopher Benson / SKYPE Meeting

AGENDA

LSA Clean-up

1. Only way to prepare for the LSA at agency level is to review your data quality, consumer rosters, and if applicable, residence units and HMIS bed inventory
2. Start by running a program profile report
 - a. Click Path: Reports>Select “All Agency Programs” in program drop-down>Select “All” on “Show Reports” menu>Enter “program profile” in search field>Click on report
 - b. Select “Continue” on settings page; DO NOT ADJUST SETTINGS
 - c. Once report appears, click on the blue heading for the “Program” column to sort roster by program
 - d. Note any consumers that need to be discharged from HMIS and complete that task before looking at your data
3. Run a Data Quality Report to investigate your data
 - a. Click Path: Reports>Select “All Agency Programs” in program drop-down>Select “All” on “Show Reports” menu>Enter “data quality” in search field>Click on report
 - b. Select a date range of that goes back no earlier than 07/1/19 and stops at today’s date
 - c. Data Quality Hot Spots:
 - i. Outside of PATH and Outreach programs, investigate any client in the ”Number of Persons with Unknown Age” field and fix as needed.
 - ii. Same goes for “Number of Child And Unknown-Age Heads of Household” filed
 - iii. Fix ALL ERRORS in “Relationship to Head of Household” field
 - iv. Fix ALL ERRORS in “Income and Sources at Annual Assessment” field
 - d. MINDFULLY review the rest of your data by considering what you know about the type of program and any info you may know about individual clients

RESIDENCE UNITS

Creating/Adding a Residence Unit (to close out a residence unit, skip to Step 12)

- 1) On Home Page, select the program from the drop down
- 2) Click **Administration**
- 3) Click **System Setup**
- 4) Click **Residence Units**

- 5) Enter all blank fields
- 6) Click **UPDATE**
- 7) You will receive a confirmation page
- 8) Click **Return to Data Entry**
- 9) **IF THE RESIDENCE UNIT HAS MORE THAN ONE BED**, copy the Unit ID from the previous apt/bed and enter it in the Unit ID field for the new bed. Enter the address, apt/bed, city, state, zip, county, first available date and all other fields, then click UPDATE
- 10) **IF THE RESIDENCE UNIT ONLY HAS ONE BED**, then leave the residence ID field blank and enter the address, apt/bed, city, state, zip, county, first available date and all other fields, then click UPDATE
- 11) In each case you will receive a confirmation page, click on Return to Data Entry to continue adding residence units and beds. Continue this procedure until all residence units and beds have been entered.
- 12) If a residence unit is no longer in use and needs to be closed out, you can enter a date in the column labeled “Last Available Date” then click on UPDATE. If you receive an error message telling you the bed was occupied until a specific date, you can then use that date as the Closure date.

HMIS BED INVENTORY (DISCUSS CONCEPT AND WALK THROUGH TIP SHEET)

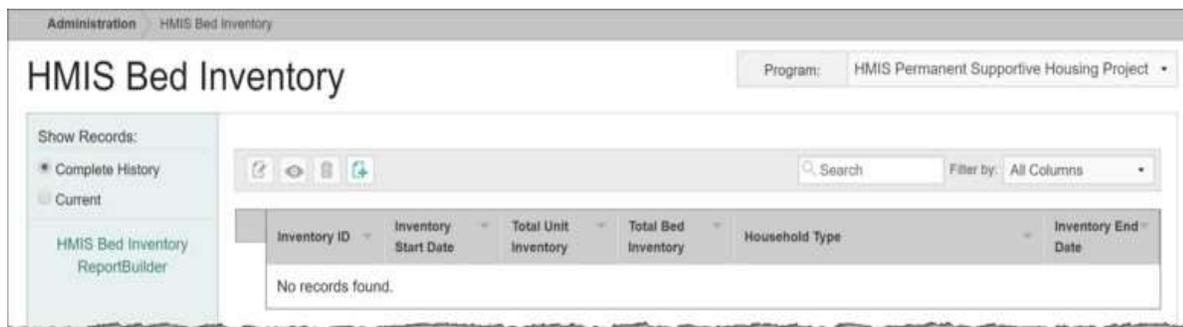
Working with HMIS Bed Inventory Records

1. Click the **Program** drop-down arrow in the upper-right corner of the page and select the program for which the HMIS bed inventory records are to be worked with.

 **NOTE:** This feature is only available for HMIS programs with an HMIS Project Type set to one of the following (under System Setup > Agency Program Information > [Add/Edit Entire Program](#) > HMIS Settings > Continuum of Care):

- *Emergency Shelter*
 - *Transitional Housing*
 - *PH- Permanent Supportive Housing*
 - *Safe Haven*
 - *PH- Housing Only*
 - *PH- Housing with Services*
 - *PH- Rapid Re-Housing*
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2. Click **Administration** from the left-hand menu, and then click **System Setup**. The System Setup fly-out menu is displayed.
3. Click **Agency Program Information**, and then click **HMIS Bed Inventory**. The *HMIS Bed Inventory* index page is displayed.



* **TIP:** When working on the index page, inventory records are easily accessible using the following tools and navigation features:

- **"Show Records" display options** - By default the index displays all current inventory records (those with no end date, or with an end date that is in the future). To expand the display to include all existing inventory records for the program instead, click **Complete History** under "Show Records" in the left-hand menu.

- **Sorting options** - By default the index is sorted numerically by inventory ID, from highest to lowest. To adjust the sorting click a column header in the table to sort by that data. Clicking a column heading a second time reverses the sort order.

- **Navigation options** - 10 records are displayed on the page by default. To access records on subsequent pages of the index (when applicable), click the **arrows** in the bottom-right corner of the table. To display 25 or 50 records at a time, click the **Show** drop-down to the left of the record count, also in the bottom-right corner, and make a selection.

Once you select records on the index, a count of how many total records are selected is displayed in the action bar. Selections are maintained while moving from one page of the index to the next; meaning, you can select records on the first page (showing records 1-10 by default) and move to the next page (displaying records 11-20) without losing the selections made on the first page. Links for **Show all selected records** and **Uncheck All** are available beneath the index table for easy navigation.

- **Search and filtering options** - A **Search** field is available on the action bar along with a corresponding **Filter by** drop-down list. To search the contents of the index (including those records not currently displayed on the page), enter a value in the **Search** field. The index is automatically updated as you type. To further narrow your search, use the **Filter by** selection to indicate whether the search should look at data in "All Columns" (the default) or a specific column.

- **ReportBuilder access** - The **HMIS Bed Inventory ReportBuilder** link on the left-hand menu bar provides a shortcut to access the ReportBuilder for this feature, which can be used to generate customized reports of detailed inventory information. Click [here](#) for instructions.

4. At this time, complete one or more of the following tasks as needed:

-  **Add a new HMIS bed inventory record** - To do so, click the **Add New** icon from the action bar above the records table. A new data entry page is displayed. Configure the fields and options on this page as necessary, and then click **Save**. The record is saved, and a confirmation page is displayed.

* **TIP:** For more information on each field/option available on the data entry page, see [HMIS Bed Inventory Record Fields / Options](#).

-  **Update an existing HMIS bed inventory record** - To do so, click the record to be updated, or click the checkbox to the left of that record and then click the **Edit** icon from the action bar above the records table. The data entry page is displayed. Make changes to the information on this page as needed, and then click **Save**. The contact record is saved, and a confirmation page is displayed.

* **TIP:** For more information on each field/option available on the data entry page, see [HMIS Bed Inventory Record Fields / Options](#).

★ **IMPORTANT!** When working with existing bed inventory records, keep in mind that HUD treats a set of beds that start and end on the same date and have the same data settings as a record. As a result, there is not a one to one correlation between residence units and bed inventory records; however, the addition or removal of residence units does require changes to be made to the corresponding bed inventory record. For example, if you have a unit and bed inventory of 10 beds for 10 years and today one unit becomes permanently unusable, you would archive the [residence unit](#) in question, AND do the following in the [Bed Inventory](#) feature:

1) Place an Inventory End Date on the bed inventory record so that the existing record about the 10 beds ends today.

2) Create a new bed inventory record for the remaining group of 9 beds that starts today.

In this example you would NOT edit the existing bed inventory record to change the number of beds from 10 to 9. That type of edit should only be made in the event that the original record incorrectly identified the number of beds. In cases like the above, a new record should always be created to correctly reflect a change in the number.

-  **View or print an existing HMIS bed inventory record** - To do so, click the checkbox to the left the record to be viewed/printed, and then click the **View** icon from the action bar above the records table. A read-only version of the record is displayed and can be printed as needed using your browser's print option.
-  **Delete an existing HMIS bed inventory record** - To do so, click the checkbox(es) to the left of the record(s) to be deleted, and then click the **Delete** icon from the action bar above the records table. A confirmation message is displayed. Click **OK** to proceed with the deletion. The selected record(s) are deleted and the updated index is displayed.
-  **Return to the HMIS bed inventory records index** - To do so, click the **To Index** icon from the action bar while working in a bed inventory record to return to the index page. You can also return to the index page at any time by clicking **HMIS Bed Inventory** from the breadcrumbs trail below the AWARDS navigation bar.

The process of working with HMIS bed inventory records is now complete.

**Please call to RSVP 973-579-1180
or email wrizquierdo@familypromisesussex.org**