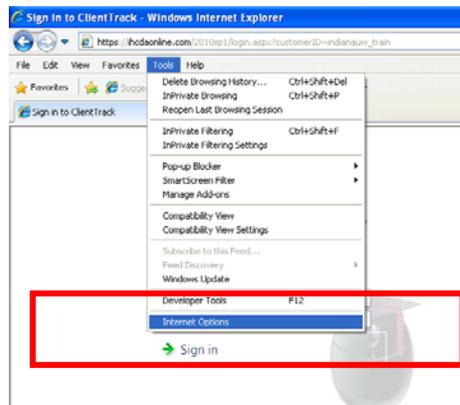


APR Data Quality Review and Cleanup Procedures

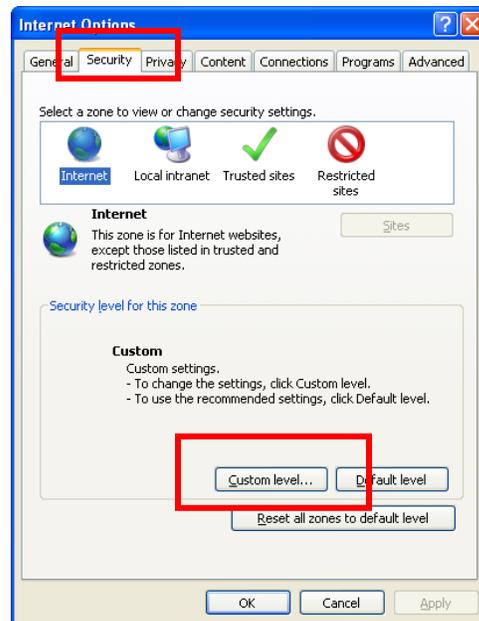
The following outlines the procedures for running an Annual Progress Report (APR), reviewing data quality, then correcting missing information.

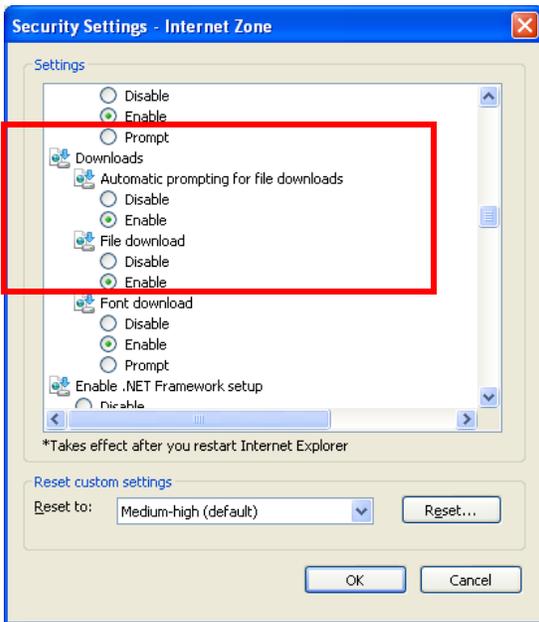
1. Configure your browser to automatically prompt for downloads.



Open Internet Explorer. From the Tools menu, select Internet Options.

Click the Security Tab, then select Custom Level





Scroll down to the Downloads section. Make sure the settings for *Automatic prompting for file downloads* and *File download* are both set to Enable.

Click OK to continue

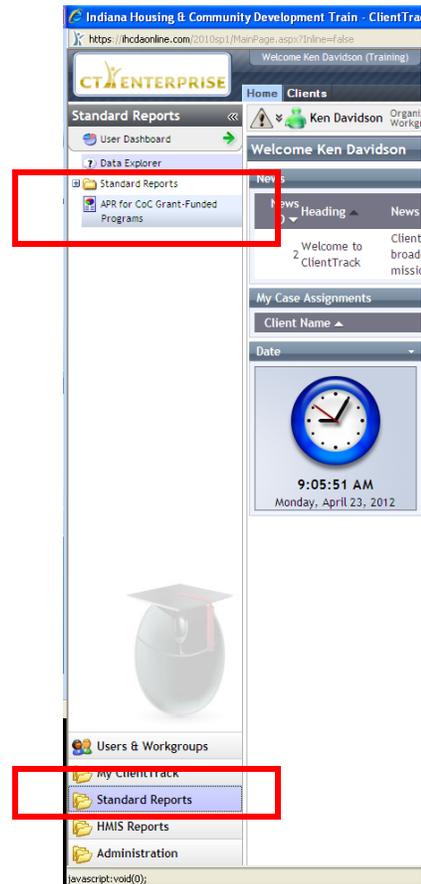
Click OK again to close the Internet Options dialog box.

2. Run APR Report

Log in to ClientTrack.

From the Home Tab, select the Standard Reports menu group.

Click APR for CoC Grant-Funded Programs



Enter the Report Parameters

Select a Predefined Date Range or enter a start and end date.

Select your Organization name.

Select the Grant Program type and Grant Program Component type

Choose the Grant(s) and the associated Program(s)

Click Report.

Navigate to Page 2 of the report using the green arrows at the top of the Report Viewer.

Click on the Section Heading [Q7. Data Quality](#).

HMIS or Comparable Database Data Quality		
Data Element	Don't Know or Refused	Missing Data
First Name	0	0
Last Name	0	0
SSN	0	0
Date of Birth	0	6
Race	0	0
Ethnicity	0	0
Gender	0	0
Veteran Status	0	13
Disabling Condition	0	19
Residence Prior to Entry	0	13
Zip of Last Permanent Address	0	13
Housing Status (at Entry)	0	28
Income (at Entry)	0	9
Income (at Exit)	0	0
Non-Cash Benefits (at Entry)	0	9
Non-Cash Benefits (at Exit)	0	0
Physical Disability (at Entry)	0	0
Developmental Disability (at Entry)	0	0
Chronic Health Condition (at Entry)	0	0
HIV / AIDS (at Entry)	0	0
Mental Health (at Entry)	0	0
Substance Abuse (at Entry)	0	0
Domestic Violence (at Entry)	0	18
Destination	0	0



Click the 2nd Excel icon (the icon with the yellow symbol) in the new report viewer. This will export the data only to Excel – no formatting – making it easier to sort as needed.

Select Open to open the document or Save to save the document and open later.



The document should open in Microsoft Excel. If you experience any issues opening the file, please contact the Help Desk at HMISHelpDesk@ihcdaonline.com

ClientID	CaseName	Birthdate	BirthdateQuality	Age	Race	Ethnicity	Gender	Adult/Child	Unaccompanied/Youth	HouseholdType	LeaverStatus
822069	61062100406737	06/12/1978	Full DOB Reported	33	Black or African American	Non-Hispanic/Latino	Male	Adult	No	Adults Only	Stayer
821490	58872100642537	01/29/1959	Missing	53	Black or African American	Non-Hispanic/Latino	Female	Adult	No	Adults Only	Stayer
879879	54088101178	09/02/2000	Full DOB Reported	11	Black or African American	Non-Hispanic/Latino	Female	Child	No	Adults and Children	Stayer
879879	54088101178	06/12/2003	Full DOB Reported	8	Black or African American	Non-Hispanic/Latino	Female	Child	No	Adults and Children	Stayer
822079	54088101178	06/15/1980	Missing	31	Black or African American	Non-Hispanic/Latino	Female	Adult	No	Adults and Children	Stayer
879879	54088101178	08/05/2006	Full DOB Reported	5	Black or African American	Non-Hispanic/Latino	Female	Child	No	Adults and Children	Stayer
879869	54526101184	04/30/1998	Full DOB Reported	13	Black or African American	Non-Hispanic/Latino	Female	Child	No	Adults and Children	Stayer
822069	54526101184	08/02/2000	Full DOB Reported	11	Black or African American	Non-Hispanic/Latino	Female	Adult	No	Adults and Children	Stayer
821633	54599102133637	09/09/1959	Missing	53	White	Hispanic/Latino	Male	Adult	No	Adults Only	Stayer
810179	50345102686537	01/22/1956	Full DOB Reported	56	Black or African American	Non-Hispanic/Latino	Female	Adult	No	Adults Only	Stayer
822069	57340105766237	12/17/1983	Missing	28	Black or African American	Non-Hispanic/Latino	Female	Adult	No	Adults Only	Stayer
821809	51822107354837	10/03/1957	Missing	54	Black or African American	Non-Hispanic/Latino	Male	Adult	No	Adults Only	Stayer
822969	56634107385737	01/30/1963	Full DOB Reported	49	Black or African American	Non-Hispanic/Latino	Female	Adult	No	Adults Only	Stayer
832959	50407112291737	10/09/1957	Full DOB Reported	54	Black or African American	Non-Hispanic/Latino	Male	Adult	No	Adults Only	Stayer
827099	58052113550937	06/14/1972	Full DOB Reported	39	Black or African American	Hispanic/Latino	Male	Adult	No	Adults Only	Stayer
812322	5865535128	03/14/1951	Full DOB Reported	61	Asian	Non-Hispanic/Latino	Female	Adult	No	Adults Only	Stayer
860722	555775915	11/11/1990	Full DOB Reported	21	Black or African American	Non-Hispanic/Latino	Male	Adult	No	Adults Only	Stayer

The Excel document will list the missing, don't know and refused values for each client on the various sections of the data quality section of the APR.

3. Correcting Data Quality Issues

Missing Master Assessments

Enrollment Description	Case Members	Enroll Date	Exit Date	Enroll ID	Exit ID	Organization	Last Assessment Completed
Edgewater - SPC (R1a) - Edgewater Systems - SPC (PH-R1a-45)	2	07/01/2011				Edgewater Systems for Balanced Living	11/22/2011

Locate a client from the Excel extract with missing information. Open his/her record in ClientTrack.

On the client dashboard, verify that the client has an Enroll ID if they are enrolled in a program and an Exit ID if they are exited.

In the above example, you will see an Enroll data, but no associated Enroll ID. Note the Enroll Date and Program Name.

If there is an Enroll ID and, if applicable, an Exit ID, skip this section and proceed to the next section – **Reviewing Entry/Exit Assessments**.

Enrollment Description	Case Members	Enroll Date	Exit Date	Enroll ID	Exit ID	Organization	Last Assessment Completed
Edgewater - SPC (R1a) - Edgewater Systems - SPC (PH-R1a-45)	2	07/01/2011				Edgewater Systems for Balanced Living	11/22/2011

From the Navigation Menu, select Enrollments. Then, click the blue circle next to the desired enrollment and click Edit Enrollment.

Case Manager: _____

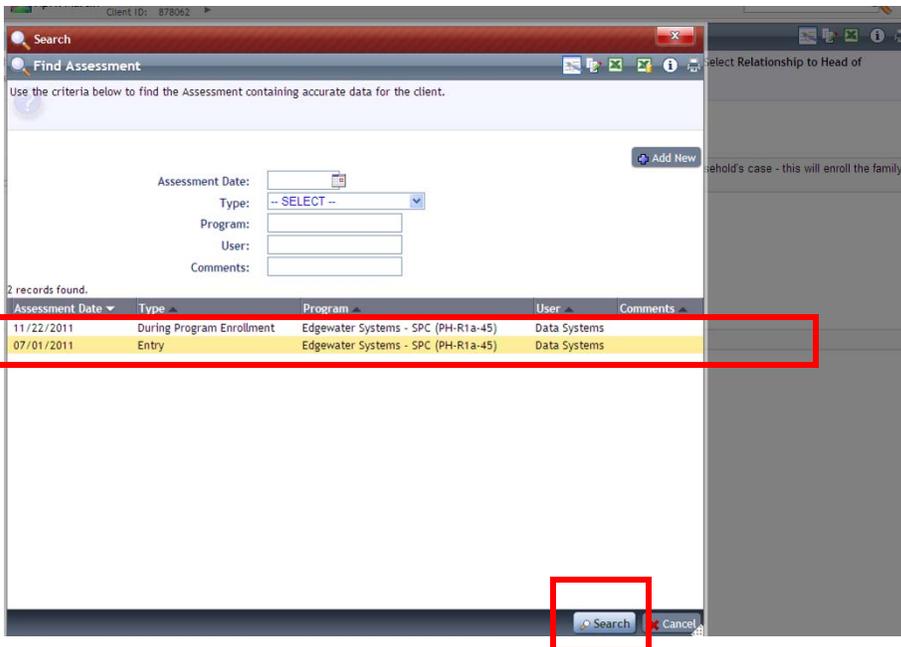
Entry Assessment - Select the Assessment corresponding to the point-in-time of entry for this enrollment.

Entry Assessment: *
No Assessment Selected

Comments: _____

Restriction: * Restrict to Organization ? Unrestricted

At the bottom of the enrollment screen it will display Entry Assessment: No Assessment Selected. Click the lookup icon (Magnifying Glass) to search for and attach an Entry Assessment to the enrollment.

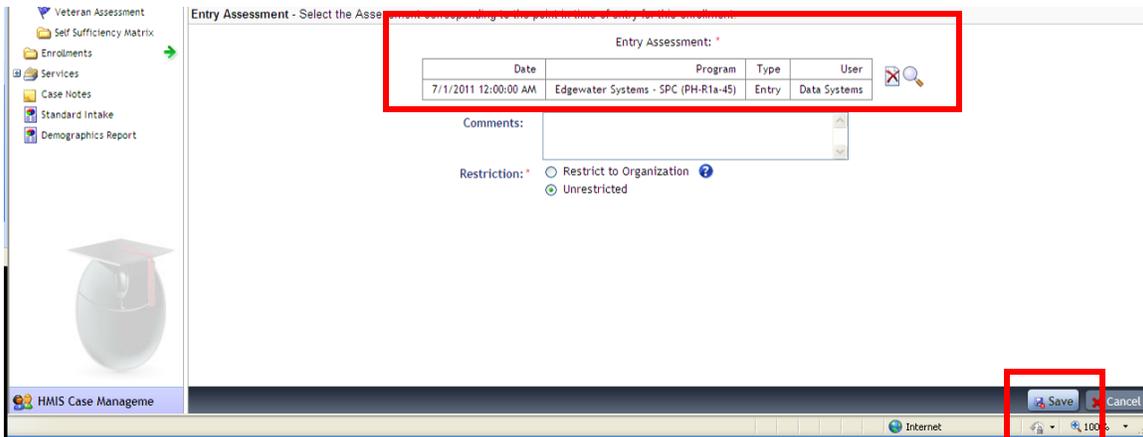


Leaving the search fields blank, click Search at the bottom of the Find Assessment dialog box.

A list will be displayed of each of the client's Master Assessments.

Select the appropriate assessment from this list by hovering over the line with your mouse and clicking.

Be sure to select the Master Assessment with the same date as the enrollment, the same type (Entry for Entry Assessments, Exit for Exit Assessments), and the same Program.



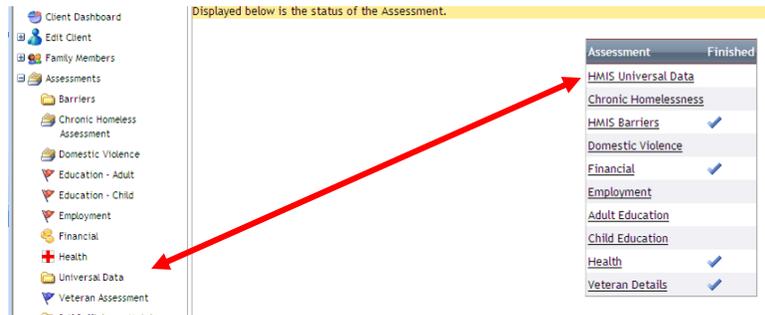
Notice the assessment is now attached to the enrollment. Click Save to continue.

Reviewing Entry/Exit Assessments

From the Enrollment screen, select the icon next to the desired enrollment and click Review Entry (or Exit) Assessments. Note, for these options to appear on the menu, an Entry Assessment and, if exited, Exit Assessment must be attached to the enrollment. If you do not see these options, complete the steps above to attach an assessment to the enrollment.

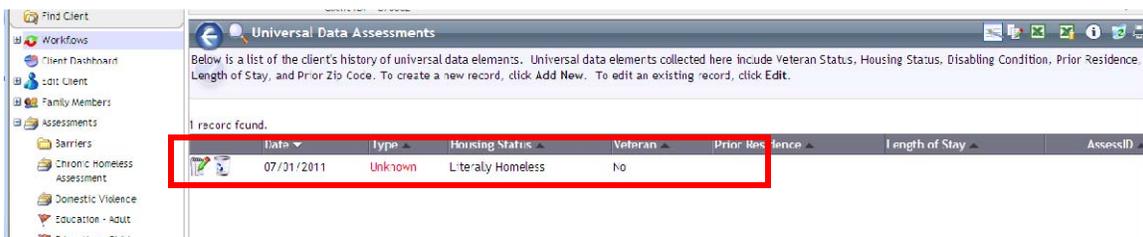


The Assessment Status window will display a list of the required HMIS assessments. A checkmark indicates the assessment is finished and correctly linked to the enrollment. If assessments are missing, the data quality section of the APR report will display missing data.

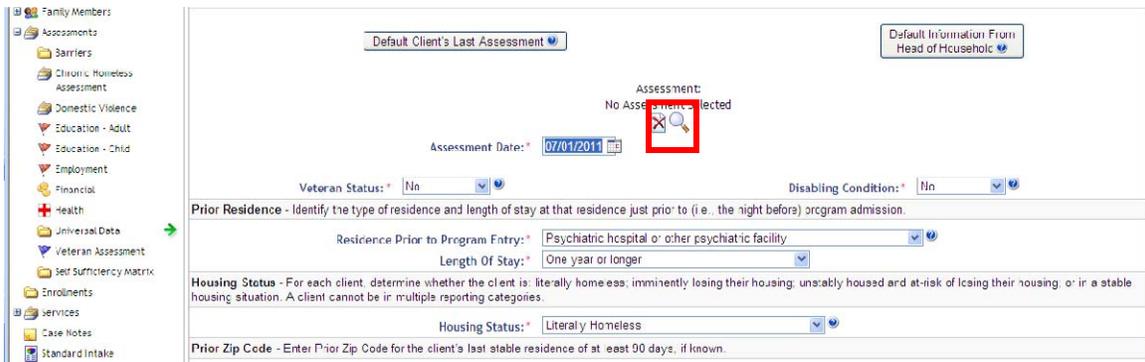


If an assessment is not checked, it is either missing or is not tied to the master assessment correctly.

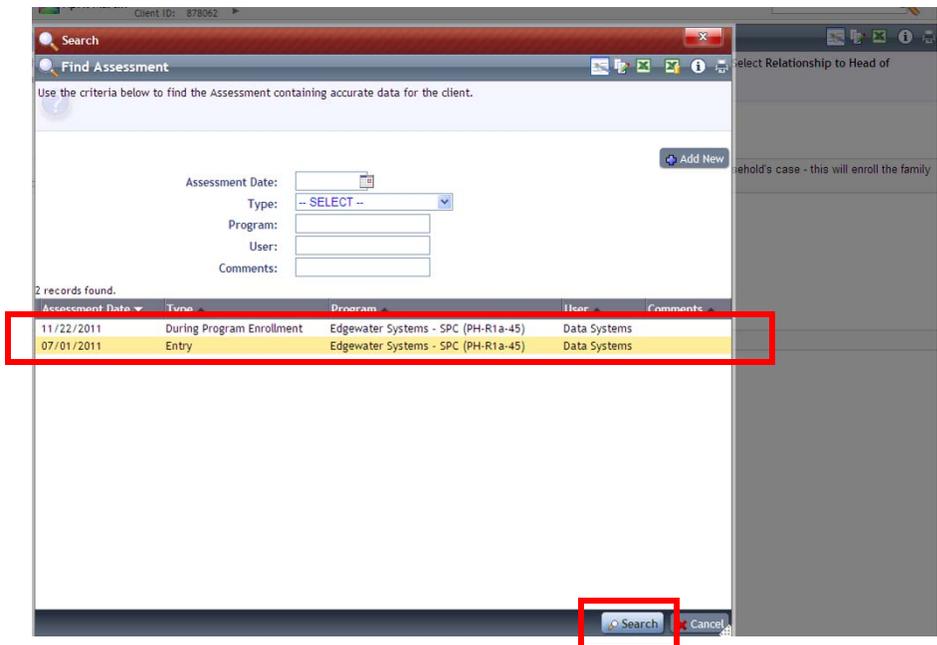
Each assessment category on the Assessment Status screen correlates to a corresponding assessment on the navigation menu. In the above example, the client is missing the HMIS Universal Data assessment. To determine if a Universal Data assessment exists for this client, click Universal Data on the navigation menu.



If an assessment exists and the date corresponds to the same date as the enrollment, click the Edit icon next to it to link it to the Master Assessment.



Click the lookup icon (Magnifying Glass) under the section **Assessment: No Assessment Selected**.

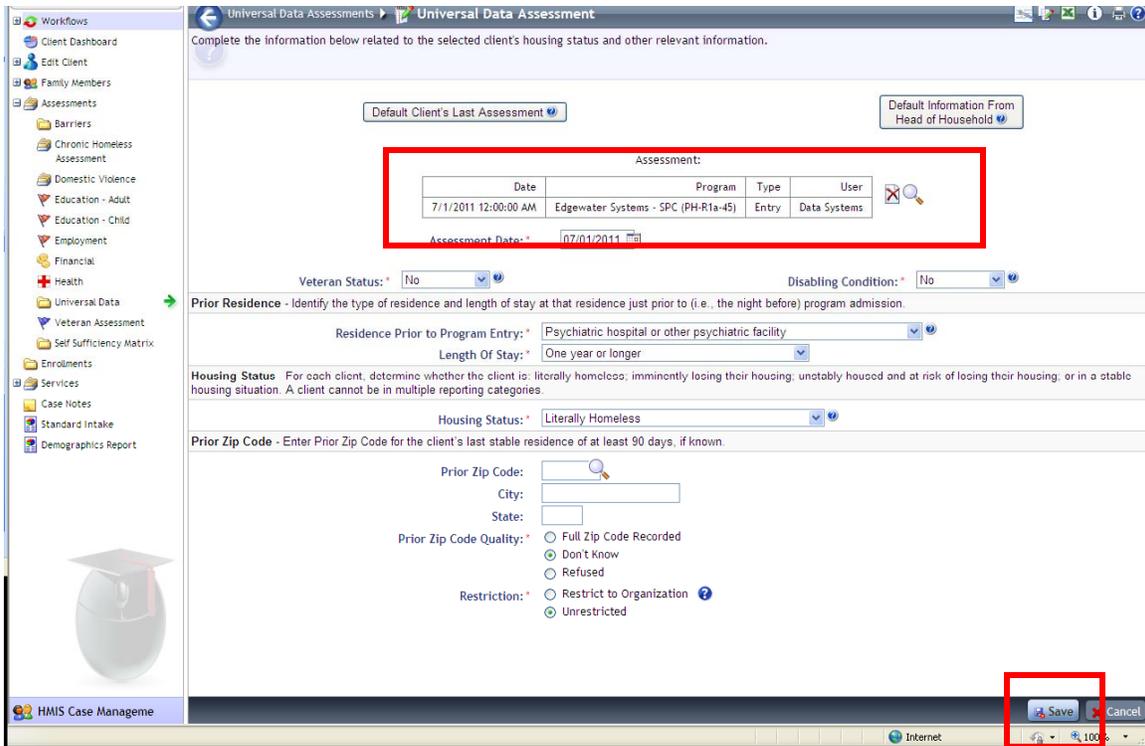


Leaving the search fields blank, click Search at the bottom of the Find Assessment dialog box.

A list will be displayed of each of the client's Master Assessments.

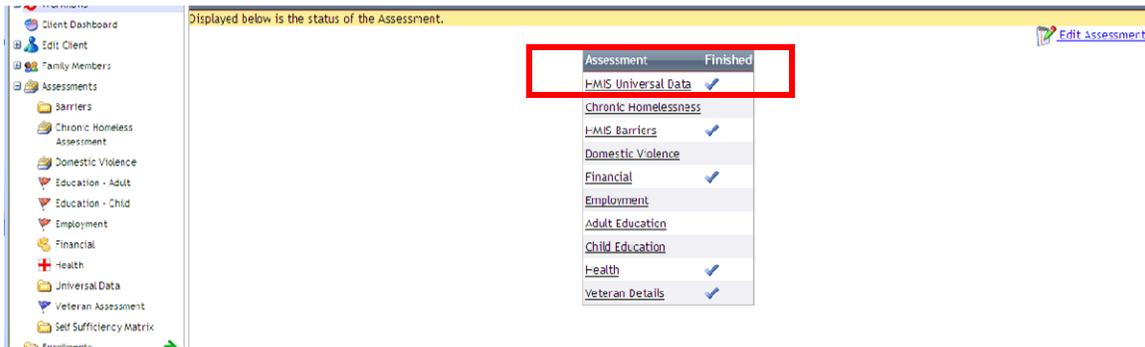
Select the appropriate assessment from this list by hovering over the line with your mouse and clicking.

Be sure to select the Master Assessment with the same date as the enrollment, the same type (Entry for Entry Assessments, Exit for Exit Assessments), and the same Program.



Notice the assessment is now attached to the enrollment. Click Save to continue.

Return to the Enrollments screen, click the icon next to the desired enrollment and select Review Entry Assessments.



A checkmark should appear next to the assessment you just linked.

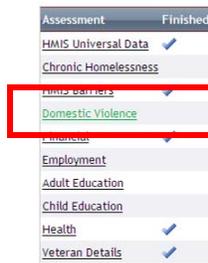
In some cases, an unchecked assessment on the Assessment Status screen could mean an assessment is completely missing.

For example, the Assessment Status screen above shows a missing Domestic Violence assessment.



Clicking Domestic Violence on the left Navigation Menu returns no results.

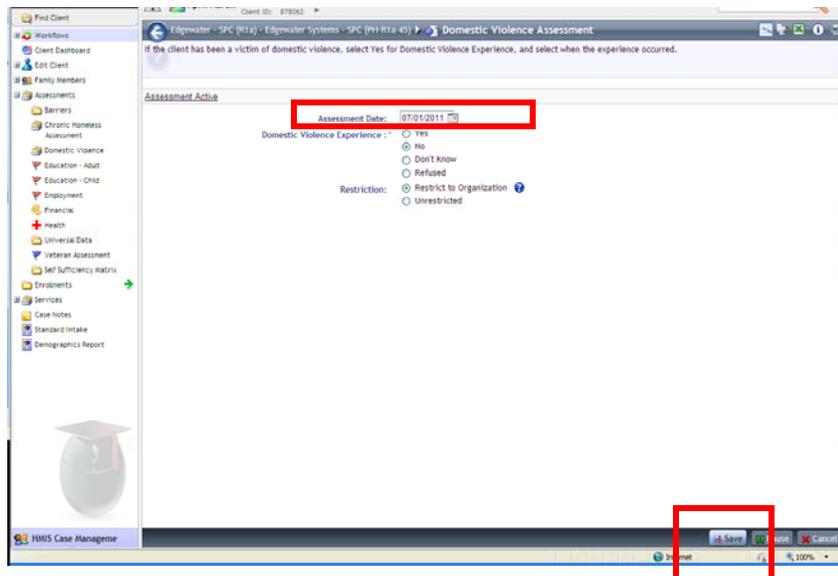
To create a missing assessment, return to the Enrollments screen, click the icon next to the desired enrollment and select Review Entry Assessments.

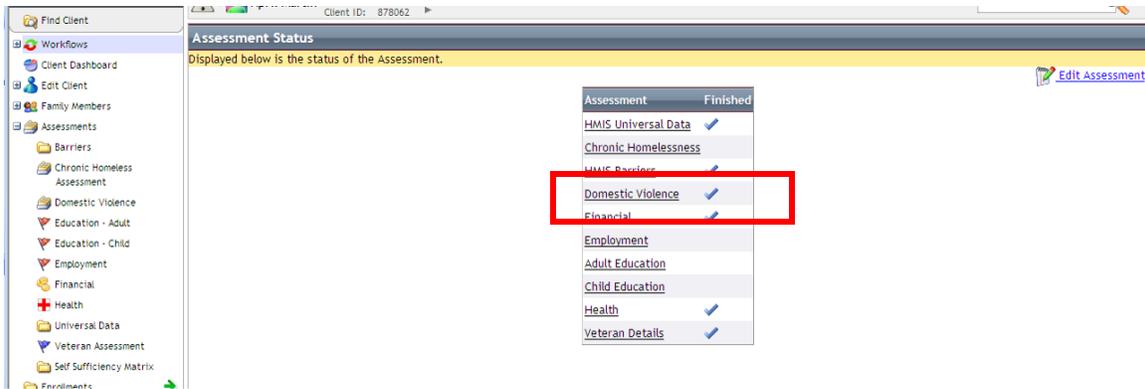


Click the name of the missing assessment

A new assessment will be created. The system will automatically set the Assessment Date to the same date as the enrollment.

Complete the assessment and click Save to continue.





A checkmark will now appear next to the newly created assessment.

Repeat the above steps to link the remaining assessments. Note, if the client is an Adult, no Child Education Assessment is necessary. If the client is a Child, no Adult Education or DV Assessment is required.

For additional assistance, please contact the Help Desk at HMISHelpDesk@ihcdaonline.com