

HOW TO GUIDE FOR ADDRESSING DATA QUALITY ISSUES FOR INCOME AND SOURCES AT START

Data Quality issues for Income and Sources at Start are caused by entry assessments not having the same date as the project start or by a client missing their financial assessment entirely.

Using the APR/CAPER Review Tool will allow you to identify the client(s) who are throwing different data errors. Below are step by step steps on how to fix the Income and Sources at Start error rate.

How to fix the issue if the assessment dates are different than the project start date

1. If you create a CAPER and load the CAPER Review tool it is much easier to locate errors and address them individually. If you need a refresher on how to use the APR/CAPER Review tool click [here](#).

By clicking on the underlined number next to the Income and Sources at Start, the system will create a list of clients that have this error so we can take a closer look.

After going through the APR/CAPER Review Tool and identifying the client(s) who are throwing the error, **click on the client ID and go to the client's dashboard.**

Q6c - Data Quality: Income and Housing Data Quality

Data Element	Error Count	Percent of Error Rate
Destination (3.12)	<u>16</u>	3.33%
Income and Sources (4.2) at Start	<u>94</u>	12.26%
Income and Sources (4.2) at Annual Assessment	<u>60</u>	73.17%
Income and Sources (4.2) at Exit	<u>31</u>	10.40%

2. Here, you will want to **locate the project start date** for the enrollment in question and then click on the three dots next to that enrollment.
In the screenshot below the project start date is 3/1/22.

- Client Dashboard
- Find Client
- Intake
- COVID-19 Vaccine Intake
- > Client Profile
- > Common Client Assessments
- > Other Assessments
- > Client Enrollment and Client Services

Anastasia Romanoff
1/1/1970
Social Security Number
??-??-1111
Client ID
1048310

Anastasia Romanoff's Dashboard

Anastasia Romanoff's Information

Name: Romanoff, Anastasia

Gender: Female

Ethnicity: Non-Hispanic/Non-Latin(a)
(o)(x)

Anastasia's Enrollments

4 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date
v Active				
v PH - Rapid Re-Housing				
My Fake Organization CoC RRH (RRH-R8)	4	03/01/2022	03/15/2022	

3. Then, select "Edit Project Entry Workflow" from the drop-down menu.

Anastasia's Enrollments

4 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date
v Active				
v PH - Rapid Re-Housing				
My Fake Organization CoC RRH (RRH-R8)	4	03/01/2022	03/15/2022	
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> Add Household Member View Case Members Exit the Enrollment Edit Enrollment <li style="background-color: #007bff; color: white; padding: 2px;"> Edit Project Entry Workflow Review Entry Assessments Update/Annual Assessment </div>	2	01/25/2023		01/26/2023
Review Entry Assessments	2	01/26/2022		01/27/2022

4. Go through the intake making sure the assessment dates are the same as the project start date.
 - a. If one or more of the assessment dates is different than the project start date, then **edit the date so it is the same as the project start date**. Once you have changed all the assessment dates to match the project start date, finish the workflow by clicking the “Finish” button.

Intake (2298) Anastasia Romanoff Social Security Number Client ID
1/1/1970 ???-??-1111 1048310

Universal Data Assessment

Master Assessment Active. C
Default Client's Last

Universal Data Assessment * 03/01/2022

Information Date:

Age while in project: 53

Assessment Type: Entry

Disabling Condition: * No

- b. Next, click on “Common Client Assessments” on the left-side menu and click on “Master Assessments” from the drop-down menu.

Find Client
Intake
COVID-19 Vaccine Intake

Client Profile
Common Client Assessments
Master Assessments
Domestic Violence
Barriers
Education - Adult
Education - Child

Anastasia Romanoff's Dashboard

Anastasia Romanoff's Information

Name: Romanoff, Anastasia
Gender: Female
Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x)

Anastasia's Enrollments

- c. Click on the three dots next to the entry assessment you wish to edit then **select “View Related Assessments”** from the drop-down menu.

> Client Profile 8 results fo

Common Client Assessments

	Date ↓	Program	Type
Master Assessments	06/21/2023	My Fake Organization CoC RRH (RRH-R8)	Exit
Domestic Violence	04/21/2023	My Fake Organization CoC RRH (RRH-R8)	Exit
Barriers	03/01/2023	My Fake Organization CoC RRH (RRH-R8)	Annual
Education - Adult	01/25/2023	PIT ABC Shelter (ES-R8a)	Entry
Education - Child	03/01/2022	My Fake Organization CoC RRH (RRH-R8)	Entry
Employment			
Financial Evaluation			
Financial Assessments			
Universal Data			

[View Related Assessments](#)
[View Related Enrollment or Applications](#)
[Delete Assessment](#)

d. To change the master assessment date, click on **“Edit Assessment”** at the top-right corner.

[Edit Assessment](#)

Details

March 01, 2022
 My Fake Organization CoC RRH (RRH-R8)
 Entry
 Daniella Jordan Gonzales

Progress 4 of 7

HMIS Barriers	Complete
HMIS Universal Data	Complete
Homeless Prevention	
T-Cell Count/Viral Load	
VASH Voucher Tracking	
Domestic Violence	Complete
Financial	Complete

e. Here you will be able to **edit the master assessment date if it is different than the project start date**. Once you are done, click **“Save”** at the bottom-right corner of the screen.

Master Assessment

A Master Assessment record ties together a number of separate, detailed assessments/data elements to a single process. For example, if this assessment is active will be tied to the entry.

Start Assessment:

Assessment Date: * 03/01/2022



Assessment Type: * Entry

Program: * My Fake Organization CoC RRH (RRH-R8)

Assessor: * Daniella Jordan Gonzales

Comments

If you have any other comments or notes regarding this assessment, please enter them below.

Comments:

5. You have successfully changed the master assessment dates to match the project start date to fix the Income and Sources at Start for your client.

How to fix the issue if the financial assessment is missing.

1. Go to the client's dashboard.

Client Dashboard

- Find Client
- Intake
- COVID-19 Vaccine Intake

> Client Profile

> Common Client Assessments


> Other Assessments

> Client Enrollment and Client Services

Anastasia Romanoff 1/1/1970 Social Security Number ???-??-1111 Client ID 1048310

Anastasia Romanoff's Dashboard

Anastasia Romanoff's Information

 **Name:** Romanoff, Anastasia

Gender: Female

Ethnicity: Non-Hispanic/Non-Latin(a) (o)(x)

Anastasia's Enrollments

4 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date
Active				
PH - Rapid Re-Housing				
My Fake Organization CoC RRH (RRH-R8)	4	03/01/2022	03/15/2022	

2. Click on “Common Client Assessments” on the left-side menu, and then click on “Master Assessments” from the drop-down menu.

The screenshot shows the user interface for Anastasia Romanoff's dashboard. On the left is a navigation menu with options like 'Find Client', 'Intake', and 'COVID-19 Vaccine Intake'. Under 'Client Profile', 'Common Client Assessments' and 'Master Assessments' are highlighted with a red box. The main content area is titled 'Anastasia Romanoff's Dashboard' and contains a section for 'Anastasia Romanoff's Information' with a placeholder profile picture and fields for Name (Romanoff, Anastasia), Gender (Female), and Ethnicity (Non-Hispanic/Non-Latin(a)(o)(x)). Below this is a section for 'Anastasia's Enrollments'.

3. Click on the three dots next to the **entry** assessment in question and select “View Related Assessments” from the drop-down menu.

The screenshot shows a list of assessments for Anastasia Romanoff. The list has columns for Date, Program, and Type. The 'Entry' assessment from 03/01/2022 is selected, and a dropdown menu is open over it. The 'View Related Assessments' option is highlighted with a blue box and a red border. The 'Entry' type for this assessment is also highlighted with a red box. The text '8 results fo' is visible at the top right of the list.

Date	Program	Type
06/21/2023	My Fake Organization CoC RRH (RRH-R8)	Exit
04/21/2023	My Fake Organization CoC RRH (RRH-R8)	Exit
03/01/2023	My Fake Organization CoC RRH (RRH-R8)	Annual
01/25/2023	PIT ABC Shelter (ES-R8a)	Entry
03/01/2022	My Fake Organization CoC RRH (RRH-R8)	Entry
	sheltered Count - Test County	Entry
	-R8a)	Entry

4. If there is a green “Complete” button next to the financial assessment, it means it was completed. If not, the assessment was not completed. In the screenshot below, note that the financial assessment does not have a green “Complete” button next to the Financial Assessment.

Assessment Status

The screenshot shows the 'Assessment Status' page. On the left, under 'Details', there is information about the date (July 02, 2023), organization (My Fake Org PSH), entry type (Entry), and user (Daniella Jordan Gonzales). On the right, under 'Progress', there is a list of assessment items with their completion status. The items are: HMIS Barriers (Complete), HMIS Universal Data (Complete), Homeless Prevention, T-Cell Count/Viral Load, VASH Voucher Tracking, Domestic Violence (Complete), and Financial. The 'HMIS Universal Data' and 'Financial' items are highlighted with red boxes.

Item	Status
HMIS Barriers	Complete
HMIS Universal Data	Complete
Homeless Prevention	
T-Cell Count/Viral Load	
VASH Voucher Tracking	
Domestic Violence	Complete
Financial	

5. ALWAYS double check Paused Workflows to edit/continue the entry assessments through the paused workflow. To see if you have paused workflows, click on "Edit Client" on the left-side menu and select "Paused Workflows" under the drop-down menu and click on the three dots next to the enrollment you wish to resume, and click "Resume" from the drop-down menu. as shown in the screenshot below.


The screenshot shows the 'Client Profile' menu on the left, with 'Paused Workflows' highlighted. The main area displays a table of paused workflows. The 'Resume' button for the first workflow is highlighted with a red box.



Workflow	Description
HMIS 2014 Streamlined Program Data Exit	Romanoff, Anastasia
⋮ Resume	Romanoff, Anastasia
⏪ Restart	Romanoff, Anastasia
✖ Delete Paused Workflow	Romanoff, Anastasia
HMIS 2014 Streamlined Program Data Exit	Romanoff, Anastasia



- a. If you do not have a paused workflow that is causing the issue, click on the not completed financial assessment, the next window will pop-up as shown in the screenshot below. Complete the assessment with the reported information and then click "Save and Close."



Default Last Assessment

Assessment Active

Assessment Date: * 08/15/2023 

Income from Any Source: * -- SELECT --  

Non-Cash Benefits from Any Source: * -- SELECT --  

Expenses: -- SELECT --  

6. You have successfully completed the missing annual assessment and fixed the error for Income and Sources at Start.