
The Datastrophes: From Messy to Manageable

Data Engagement Workshop (DEW)
Wednesday, November 19, 2025
1:00pm - 3:00pm



Introductions - **Your Sys. Admin. Team**



Bryanna Corsbie
Senior Project Administrator



Lesly Soto Bright
Senior Project Administrator

OBJECTIVE



This session will teach staff how to efficiently monitor data quality and implement practical steps to fix data errors as they appear in Clarity.

We'll show you how to leverage the system's tools to ensure your reporting is accurate.

Housekeeping - Gentle Reminders

- This training like all DEWs is being recorded
- All participants should be muted
- Q&A will be at the end of each section, please hold questions and comments until that time
- You are welcome to put comments and questions in the chat
- Video is optional - **but please do not multitask - if possible**

AGENDA

- Importance of Data Quality
- Program Managers – *Roles & Responsibilities*
- Report Library
 - Running a Canned Report
- Data Analysis Tab
 - Running DA Report
- Assessment Types – *Annual vs. Status*
- Recommended Reports
- Hands On Practicum
- Questions?





Importance of Data Quality





Ice Breaker

- What is DQ?
- What are some examples of bad data that you have noticed?





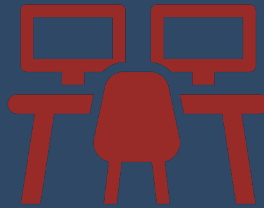
Why Bad Data Happens



What Contributes to Bad Data?



**Employees improperly
trained in importance of
data & workflow**



**Sometimes the work
environment isn't optimal
and prevents focus**



**Overloading employees
with too much work**

What Contributes to Bad Data?



Prioritizing speed over accuracy



Not entering data into HMIS correctly or in a timely manner



Failing to double-check all data entries for accuracy



Knowledge Test

Can you find the Data Entry Errors?



CLIENT PROFILE

Social Security Number

*** - ** - XXXX ?

Quality of SSN

Client doesn't know



Last Name

Skywalker Test

First Name

Luke

Quality of Name

Data not collected



Quality of DOB

Approximate or partial DOB reported



Date of Birth

08/26/1966

Adult. Age: 59

Middle Name

Suffix None



Alias

Test Client

Sex

Male



Gender

Culturally Specific Identity (e.g., Two-Spirit), Differ...

Race and Ethnicity

Hispanic/Latina/o

Enroll Program for client Luke Skywalker Test

Program Date 11/13/2025

TRANSLATION ASSISTANCE NEEDED

WOULD THE CLIENT LIKE SERVICES TO BE PROVIDED IN A LANGUAGE OTHER THAN ENGLISH?

Translation Assistance Needed No

Zip Code of Last Address 95020

COMPLETE DATE OF ENGAGEMENT WHEN CLIENT HAS BEEN ENGAGED

Date of Engagement 10/01/2025

PRIOR LIVING SITUATION

Type of Residence Place not meant for habitation (e.g., a vehicle, an abandoned building, bus

Length of Stay in Prior Living Situation One night or less

Approximate date this episode of homelessness started 10/01/2025

Number of times on the streets, in ES, or Safe Haven in the past three years One Time

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years Two Months

DISABLING CONDITIONS AND BARRIERS

Disabling Condition No

Physical Disability Yes Long Term Client does

Developmental Disability No

Chronic Health Condition No

HIV - AIDS No

Mental Health Disorder Yes Long Term No

Substance Use Disorder Alcohol use Long Term Client does

Survivor of Domestic Violence No

Household Members

Grownup Adult child (He/Him/His)

Daughter ★



Head of
Household

Luke Skywalker Test

Father

MANAGE

366 DAYS
ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 11/13/2024

CHANGE ASSIGNED STAFF

Make Program Private



Hide from Customer Portal



Jarred Huff



SAVE CHANGES

CANCEL

Status Assessments (+)

Assessment Due - November 13th 2025

No Statuses

Assessment due every year

Notification: OFF

Importance of Data Quality (DQ) - Why it Matters

Data captures clients served, for how long, and what has changed

It's a comprehensive view of client data and program outcomes

It can help evaluate programs and show areas for improvement - such as missing data

Missing exit data can reduce the number of available priority placements for unhoused client and can also artificially inflate reported homelessness numbers

For recipients of HUD funding, some reports are required for submission

HMIS has been set-up to capture HUD requirements and Data Standard Changes - making the requirements easier to meet

Importance of Data Quality (DQ) - What to consider...

Select

✓ No

Yes

Client doesn't know

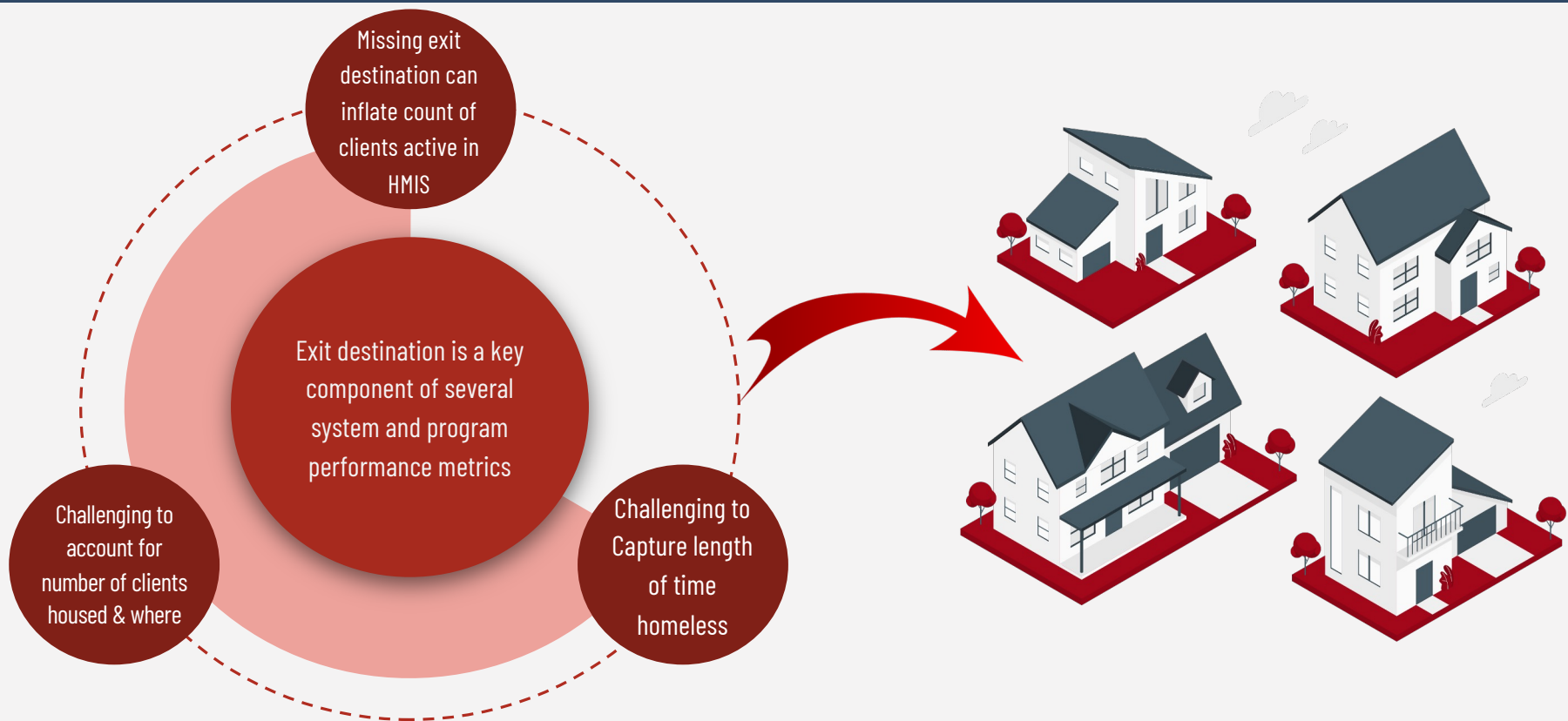
Client prefers not to answer

Data not collected

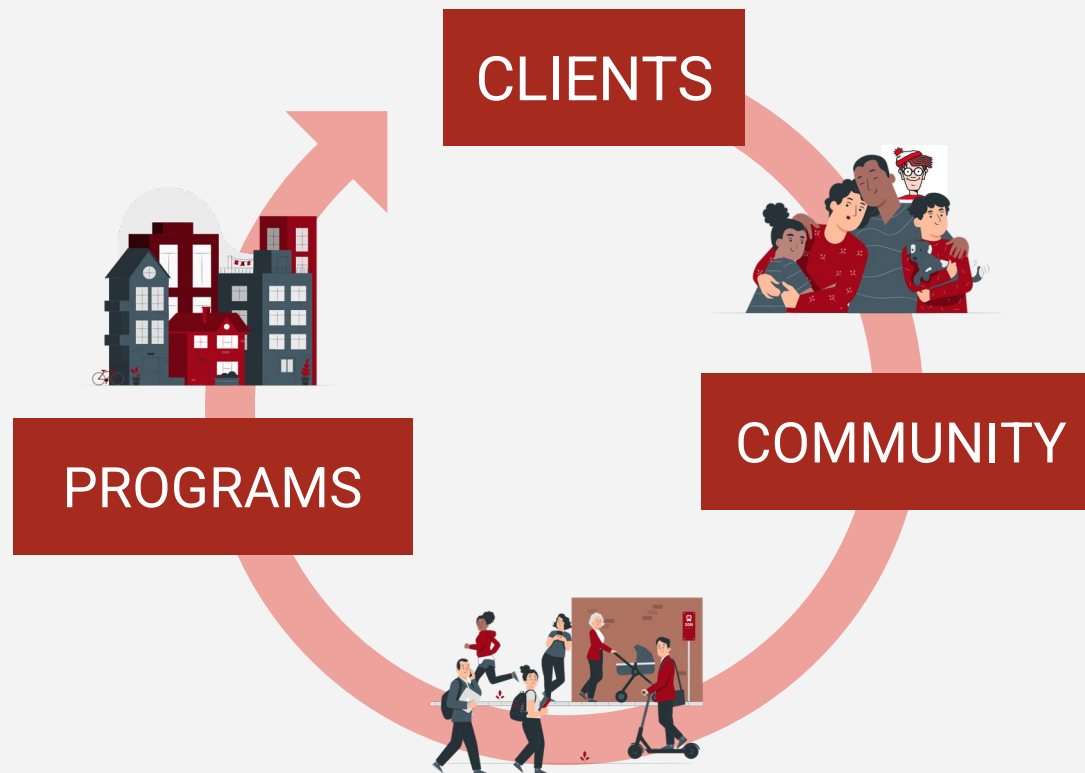


No	Appropriate to use when client self discloses
Yes	Appropriate to use when client self discloses
Client doesn't know	Appropriate to use when client self discloses; but do not use in place if you forgot to ask the client
Client prefers not to answer	Appropriate to use when client self discloses; but do not use in place if you forgot to ask the client
Data not collected	Use only when you forgot to ask the client the question
No Exit Interview Completed (Not shown here)	Use only if client was lost to follow-up and there is no way of communicating with the client to get the data
Approximate or Partial (Not shown here)	Though common, try to limit the use of this whenever possible

Importance of Data Quality (DQ) - Exit Destinations



Importance of Data Quality (DQ) - Who is Impacted?





**Questions, Comments or
Concerns?**





Program Managers; *Roles & Responsibilities*

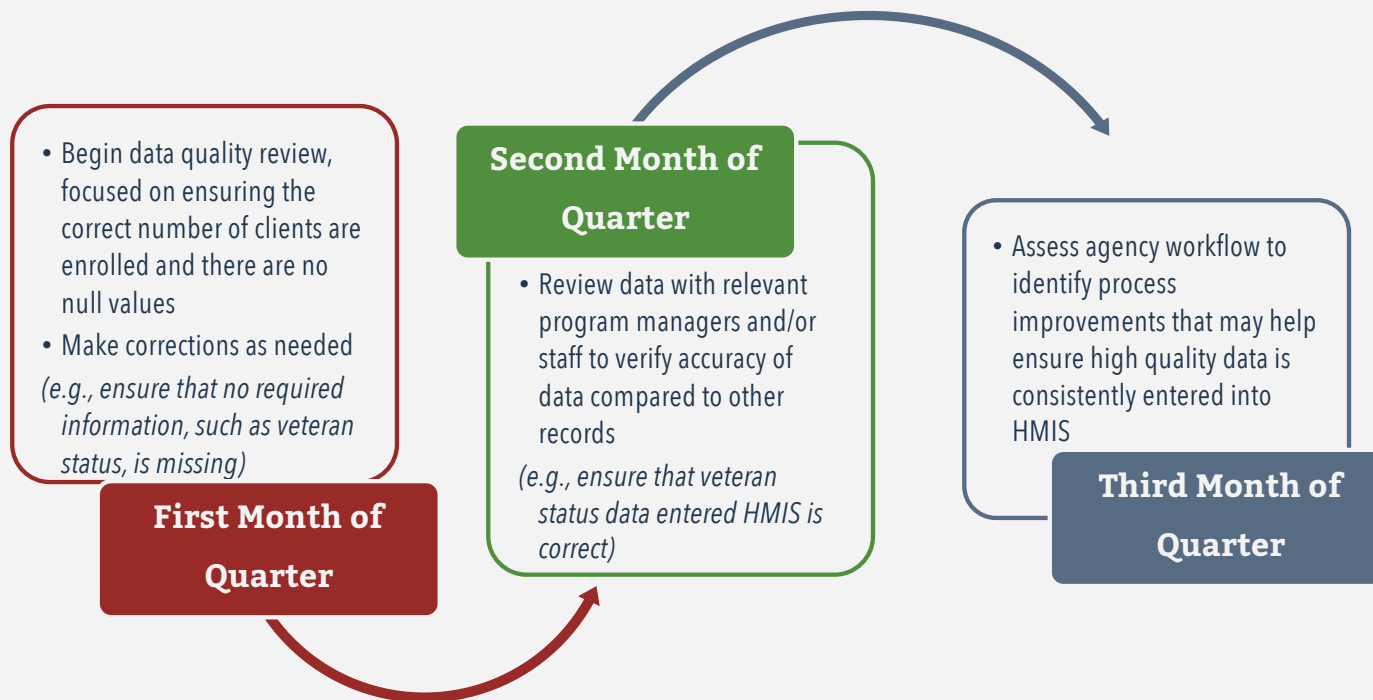


How Well Do You Know Your Program Manager Role?

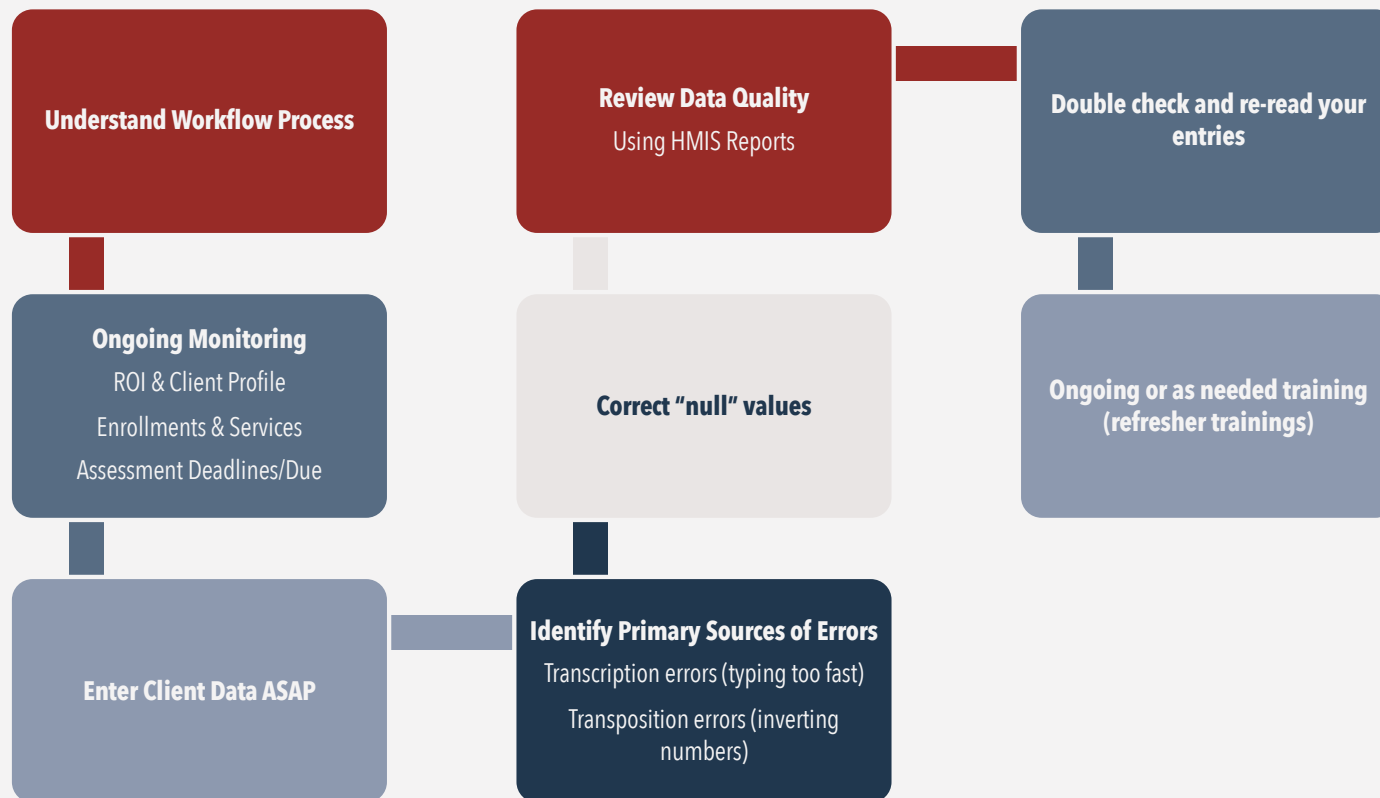
According to the Standard Operating Procedures (SOPs) how frequently should you review data quality at their agency?

- A. Conduct a complete review daily, or as necessary, dependent on program need
- B. As soon as I get a minute, too many meetings to attend
- C. Data quality reports should be run at least once per month throughout the year. In the weeks prior to submitting a report, data quality reports may need to be run daily
- D. Conduct a complete and accurate quarterly review of the Partner Agency's compliance with all applicable plans, forms, manuals, standards, agreements, policies, and governance documents
- E. Wait...am I the Agency Lead?

Useful Timetable for Evaluating & Correcting Data



Useful Monitoring Techniques





Useful Reports for Shelter & Outreach Program Managers

	SECTION	AD?	TITLE	CONTENT
WHO'S ENROLLED?	Program-Based	N	[GNRL-106] Program Roster	Who's enrolled or exited with dates and LOS
	Program-Based	Y	[GNRL-220] Program Details Report	All data from enrollment/update/exit screens + housing service dates
	Program-Based	Y	[OUTS-106] Client Demographics	Demographic breakdown charts for all enrolled clients
WHO'S BEEN SERVED?	Service-Based	N	[GNRL-104] Service Summary	Counts of services provided and unique clients
	Service-Based	N	[GNRL-103] Service Census	Counts of services provided by day, plus service summary
	Service-Based	N	[OUTS-105] Client Demographics	Demographic breakdown charts for all served clients
	Program-Based	N	[EXIT-101] Potential Exits	Clients who haven't received a service since specified date
WHERE'D WE SPEND MONEY?	Program-Based	N	[EXPS-103] Program Funding Source Financial Detail	Lists all funds spent as part of services, plus totals by service and program
STAFF DATA QUALITY	Email	N	[DQXX-103] Monthly Staff Report	Data completeness and timeliness for all staff
	HUD	Y	[HUDX-225] HMIS Data Quality Report	Comprehensive report on data quality
STAFF ACTIVITY	Agency Management	N	[STFF-104] Staff Client Data Activity Report	Staff activity in the system
	Agency Management	N	[STFF-101] User Activity Report	Staff login times and time logged in



Knowledge Test

Program Monitoring & Data Entry



How Well Do You Know Your Program Manager Role?

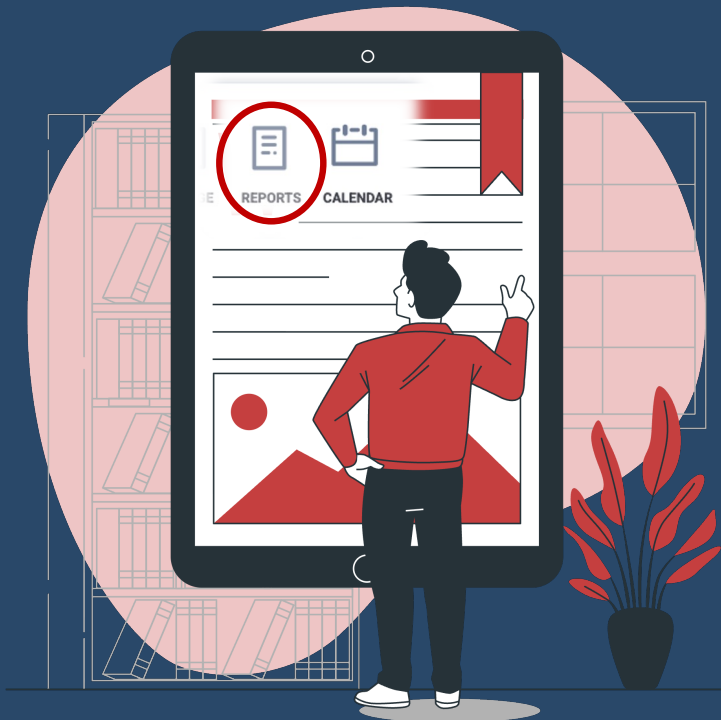
Why is regular reporting of client's income changes (updates) in HMIS important to your agency and the client? *(Choose all that apply)*

- A. Accurately demonstrates community progress and success
- B. It is not common practice to enter this in HMIS for our Agency
- C. Demonstrate an increase in the percent of homeless adults who gain or increase employment or non-employment cash income over time
- D. Maintaining timely and accurate HMIS data related to employment outcomes is not my responsibility
- E. Brings more federal dollars to Santa Clara County



**Questions, Comments or
Concerns?**





Report Library



Report Library - Library Contents

Abode Services	
REPORT LIBRARY EXPLORE DATA ANALYSIS	
REPORT LIBRARY	
Favorite Reports	5 report(s) ▾
Data Quality Reports	6 report(s) ▾
Administrator Reports	31 report(s) ▾
Service Based Reports	13 report(s) ▾
Program Based Reports	19 report(s) ▾
Assessment Based Reports	4 report(s) ▾
Profile Screen Reports	1 report(s) ▾
Housing	5 report(s) ▾
HUD Reports	7 report(s) ▾
Community and Referrals	8 report(s) ▾
Agency Specific	11 report(s) ▾
Agency Management	4 report(s) ▾

- The **Report Library** is where all canned reports are housed
- Reports are separated by Category and listed in alphanumeric order within the category
- The right-hand side column denotes the number of reports per category
- Using the caret will open - in an accordion style - the different reports found in that category

Accessing the Report Library in HMIS

The screenshot displays the Clarity Human Services client portal. The browser's address bar shows the URL `scc-train.clarityhs.com/client`. The page header includes the organization name "Amigos de Guadalupe" on the left and the user profile "Lesly Soto Bright, Amigos de Guadalupe" with a dropdown arrow and initials "LS" on the right. Navigation links for "SEARCH", "CASELOAD", and "REFERRALS" are present. The main content area features a "SEARCH FOR A CLIENT" section with a search input field, a magnifying glass icon, and a "SEARCH" button. Below the input field, a hint reads: "Use full name, partial name, date of birth or any combination." To the right of the search section is a list titled "Your recent client searches:" containing the following entries: "Maxx Effort (He/Him/His)", "Walt Disney", "Fiona Ogre (She/Her/Hers)", "Shrek Ogre (He/Him/His)", and "Mickey Mouse". At the bottom of the page, there is a footer with the text "Managed with Clarity Human Services" and a link to "Recover deleted data".

Report Library - Types of Reports

Abode Services	
REPORT LIBRARY EXPLORE DATA ANALYSIS	
REPORT LIBRARY	
Favorite Reports	5 report(s) ▼
Data Quality Reports	6 report(s) ▼
Administrator Reports	31 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	19 report(s) ▼
Assessment Based Reports	4 report(s) ▼
Profile Screen Reports	1 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	7 report(s) ▼
Community and Referrals	8 report(s) ▼
Agency Specific	11 report(s) ▼
Agency Management	4 report(s) ▼

Favorite Reports	Reports that are run very often using the same parameters can now be saved as "favorites"
Data Quality Reports	Reports that help identify DQ issues with data
Admin. Reports	Typically used to monitor staff and program utilization
Service Based Reports	Reports that are based on services provided to a client
Program Based Reports	Reports that are based on Program Data
Housing	Reports based on housing information - your program must offer housing
HUD Reports	Reports used to assist in DQ checks during Federal Reporting
Community & Referral	Reports based on Assessment and/or Referral Data
Agency Specific	Reports that are specific to your Agency set-up - based on types of programs at your agency (in most cases these are custom)

Running a Report in HMIS

Clarity Human Services - Rep x +

scc-train.clarityhs.com/report

Solano Items Bitfocus and/or L... Bright Items Clarity Login Insta... Frequently Used... HUD/Other Resou... SCC Related Item... Remove unwanted... All Bookmarks

Amigos de Guadalupe

REPORT LIBRARY EXPLORE DATA ANALYSIS

Lesly Soto Bright, Amigos de Guadalupe LS

SEARCH CASELOAD

REPORT LIBRARY

Favorite Reports	9 report(s) ▼
Data Quality Reports	6 report(s) ▼
Administrator Reports	29 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	24 report(s) ▼
Assessment Based Reports	4 report(s) ▼
Profile Screen Reports	1 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	11 report(s) ▼
Community and Referrals	9 report(s) ▼

Processed Reports

No reports

Scheduled Reports

No reports

COMPLETED

[GNRL-106] Program Roster

Processed

OPEN

9 report(s) ▾

REPORT IS READY.

Report "[GNRL-106] Program Roster" is completed.

OPEN

4 report(s) ▾

Program Roster Report

Amigos de Guadalupe
Active within 11/01/2025 thru 11/14/2025

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, ☐ = Non PH Project,

A: Assessments,

S: Services,

CN: Case Notes

You can find more information about adjusted Move-In Date at the [Help Center Article](#)

Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-In	A	S	CN	Assigned Staff	Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: Amigos Safe Parking - OSH																
Justin, Kobina (She/Her/Hers)	D69S29F4	06/26/1987	37	38	09/13/2024	-	428		0	0	0	A. Evans				
Butterfly, Star (She/Her/Hers)	D9CF86A96	02/22/1922	103	103	09/11/2025	-	65		0	0	0	B. Sunseri				
Number of Enrollments: 2																
Number of Unique Clients: 2																
Number of Households: 2																
Program: Casitas de Esperanza																
Quest Test, Johnny (He/Him/His)	C0B04601E	11/23/2002	22	22	05/21/2025	-	178		0	0	0	L. Soto Bright				
Number of Enrollments: 1																
Number of Unique Clients: 1																
Number of Households: 1																
Program: Hampton Inn (IH)																
Tomas, Samantha (She/Her/Hers)	A90E81868	10/10/1995	28	30	08/07/2024	-	465		0	0	0	J. Lopez*				
Luna, Tina (She/Her/Hers)	4A470F3C1	07/07/2017	7	8	08/07/2024	-	465		0	0	0	J. Lopez*				
Bravo, Ashely (She/Her/Hers)	35EA69512	10/12/1995	28	30	08/19/2024	-	453		0	0	0	J. Lopez*				
Bravo, Anna (She/Her/Hers)	E813D1E0B	11/03/2020	3	5	08/19/2024	-	453		0	0	0	J. Lopez*				
Bravo, Bee (She/Her/Hers)	21BD4293F	11/05/2018	5	7	08/19/2024	-	453		0	0	0	J. Lopez*				
Number of Enrollments: 5																
Number of Unique Clients: 5																
Number of Households: 2																
Program: Housing Problem Solving																
Ash, Trevino (She/Her/Hers)	05345A459	10/01/1999	25	26	01/31/2025	-	288		0	0	0	K. Ceja*				
Moreno, Jasmine (She/Her/Hers)	E1B51CB5C	12/20/1996	28	28	03/25/2025	-	235		0	0	0	E. Chavez-Morales*				
Mouse, Minnie (She/Her/Hers)	996BD89C7	12/02/1990	34	34	03/25/2025	-	235		0	1	0	E. Paredes*				
Song, Lily	0209D172B	10/31/1993	31	32	03/25/2025	-	235		0	0	0	M. Ibarra*				

Report Library – Defining the Fields

REPORT LIBRARY

HUD Reports > [HUDX-225] HMIS Data Quality Report [FY 2022]

Switch Access Agency(-ies)

California Youth Outreach (breakout Prison dba)
Campbell Union School District
Cathedral Basilica of St. Joseph
Catholic Charities
Center for Employment Training (CET)
Charles Housing

CoC Filter Category

Choose...

CoC

Choose...

Program Type(s)

Emergency Services
Transitional Housing
PH - Permanent Supportive Housing (disability required for entry)
Services Only
Street Outreach
Other

Program Status

Choose...

Continuum Project

All

Program(s)

Choose...

Report Date Range

// // 2023 - // // 2023

Report Output Mode

Regular Report

Report Output Format

☒ Web Page
☐ PDF
☐ Excel
☐ Zip with XLSX

Drilldown Output Format

☒ Web Page
☐ PDF
☐ CSV

SUBMIT

Switch Access Agency	Select the Agency you want to run the report for - this will be dependent on access role
CoC Filter Category	Always select Agency CoC
CoC	Always select Santa Clara County
Program Type	Select the Project Type you want to pull data for (i.e., ES, TH, SH, PSH, Services only or Street Outreach, or ALL)
Program Status	Select from All, Active, or Inactive Programs - these are programs at your agency - what is listed will be dependent on access role
Continuum Project	Always select YES - unless directed differently from your Agency Lead
Program(s)	If not choosing ALL programs, then select only the ones you are interested in getting data for from the list provided
Report Date Range	Enter time frame you want to pull data for - the dates you want the report to pull

Report Library – Defining the Fields

Report Output Mode

Regular Report

Report Output Format

☒ Web Page ☐ PDF ☐ Excel ☐ Zip with XLSX

Drilldown Output Format

☒ Web Page ☐ PDF ☐ CSV

SUBMIT

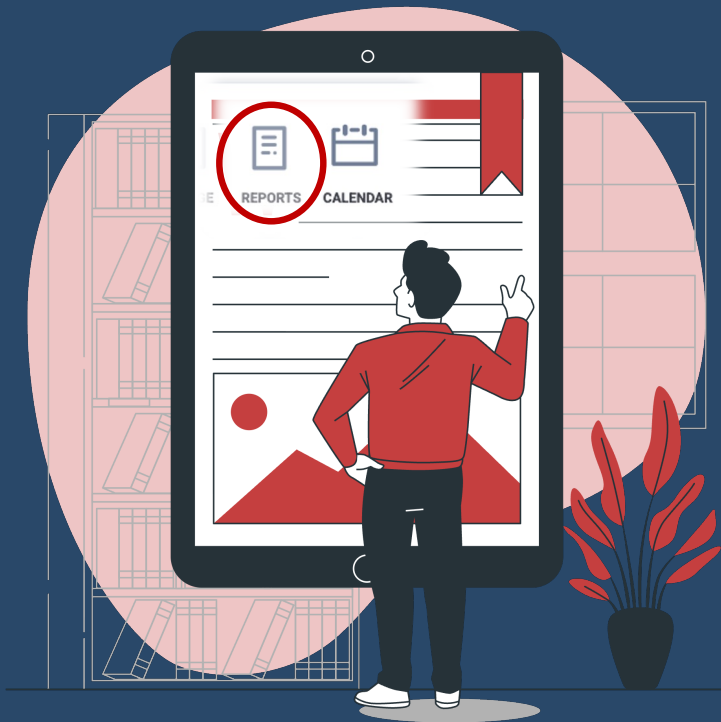
Report Output Mode	Depending on the report you are running, you may want a general report that is more concise or a details report that will show you more information and where it is pulled from specifically - not all reports will have this option	
Report Output Format	This depends on what you want to do with the data or how you want to see it	<ul style="list-style-type: none">• Web Page - will just populate on your screen• PDF - will offer a downloadable PDF file• Excel - will offer an Excel file
Drilldown Output Format	This option will pull the data, but it will link data directly to a client, this uses a hyperlink that will redirect you to the client and the specific data point being reviewed	

Please recall client confidentiality when downloading data.
Avoid leaving client names on reports and be sure to have security measures in place that protect data breaches.



**Questions, Comments or
Concerns?**





The Data Analysis Tab in HMIS



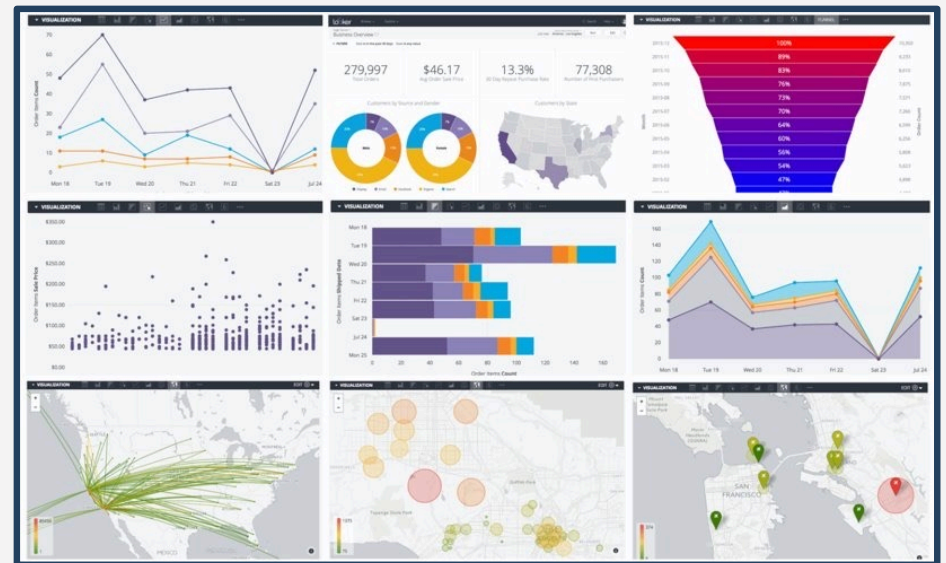
What is the Data Analysis Tab

What is the Clarity Data Analysis tool?

- Embedded Looker platform pulling your HMIS data

What is it used for?

- Data analysis and visualization platform
- Provides a single source of truth
- Pulled from data entered in Clarity Human Services
- Helps streamline reports



DA Tab Sections Defined

REPORT LIBRARY EXPLORE DATA ANALYSIS		
DATA ANALYSIS		
Built In Reports	REGULARY USED REPORTS	5 report(s) ▼
Santa Clara County HMIS Reports	SYSTEM OR COC REPORTS	73 report(s) ▼
System Reports	AGENCY SPECIFIC REPORTS	7 report(s) ▼

Accessing the DA Tab in HMIS

The screenshot displays the HMIS system interface for a client profile. The browser address bar shows the URL `scc.clarityhs.com/client/53DA21C1D/profile`. The client's name, **Luke Skywalker Test**, is prominently displayed at the top of the profile section. Below the name is a navigation menu with tabs: **PROFILE**, **HISTORY**, **PROGRAMS**, **SERVICES**, **ASSESSMENTS**, **NOTES**, **FILES**, **CONTACT**, and **LOCATION**. The **PROFILE** tab is currently selected.

A yellow warning banner at the top of the profile section states: **Release of Information is Missing. Please review to ensure compliance.** with a **MANAGE** button.

The **CLIENT PROFILE** section contains the following fields:

- Social Security Number:** *** - ** - xxxx
- Quality of SSN:** Client doesn't know
- Last Name:** Skywalker Test
- First Name:** Luke
- Quality of Name:** Full name reported
- Quality of DOB:** Full DOB Reported
- Date of Birth:** 08/26/1966 (Adult Age: 59)
- Middle Name:** (blank) Suffix: None
- Alias:** Test Client
- Sex:** Male
- Gender:** Culturally Specific Identity (e.g., Two-Spirit), Different Identity

A photo of the client is shown, with a **Connected** status indicator. Below the photo is the **UNIQUE IDENTIFIER 53DA21C1D** and a **CHECK-IN** button.

The **HOUSEHOLD MEMBERS** section shows a **Grownup Adult child (He/Him/His)** who is the **Daughter**. The **Active Programs** section lists **Countywide Hotline Outreach** and **Hotline Outreach (VW OSH)**. The **Recent Services** section lists **Housing Transition Navigation Services...**.

Running a Report in DA Tab

Clarity Human Services - CLH

scc.clarityhs.com/client/53DA21C1D/profile

Solano Items

Bitfocus and/or L...

Bright Items

Clarity Login Insta...

Frequently Used...

HUD/Other Resou...

SCC Related Item...

Remove unwanted...

All Bookmarks

Luke Skywalker Test

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

Lesly Soto Bright, System

SEARCH CASELOAD

Release of Information is Missing. Please review to ensure compliance.

MANAGE

CLIENT PROFILE

Social Security Number

*** - ** - xxxx

Quality of SSN

Client doesn't know

Last Name

Skywalker Test

First Name

Luke

Quality of Name

Full name reported

Quality of DOB

Full DOB Reported

Date of Birth

08/26/1966

Adult. Age: 59

Middle Name

Suffix None

Alias


Test Client

Sex

Male

Gender

Culturally Specific Identity (e.g., Two-Spirit), Different Identity



Connected

UNIQUE IDENTIFIER
53DA21C1D

CHECK-IN

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Emergency Shelter Queue - Households Without Children

Household Members

Manage

Grownup Adult child (He/Him/His) Daughter *

Active Programs

Countywide Hotline Outreach

test

Hotline Outreach (VW OSH)

Recent Services

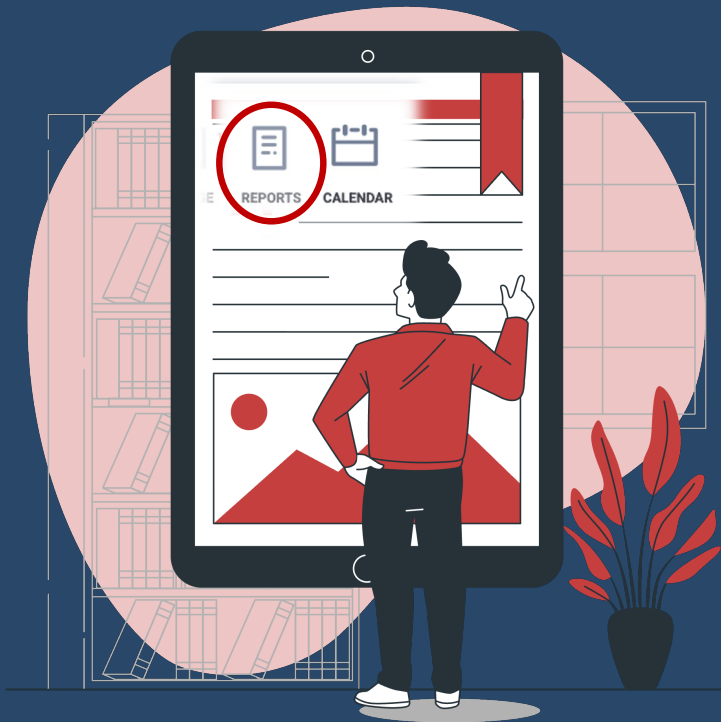
Housing Transition Navigation Services...

Housing Transition Navigation Services...



**Questions, Comments or
Concerns?**





Assessment Types – *Annual vs. Status*



Annual Assessment vs Status Assessment

FEATURE	ANNUAL ASSESSMENT	STATUS ASSESSMENT (OR STATUS UPDATE)
TIMING/FREQUENCY	Required annually , typically within a 60-day window (30 days before to 30 days after) the Head of Household's Project Start Date anniversary.	As needed or at the time of change in a client's status.
PURPOSE	To capture a formal, once-a-year review of a client's status, especially for federal reporting requirements (like HUD's Annual Performance Report). It must be completed even if no information has changed.	To record changes in a client's information (like income, benefits, or disabling conditions) that occur between the formal Annual Assessments.
TRIGGER	The anniversary date of the Head of Household's enrollment in the project.	A specific event or change in the client's information (e.g., they got a job, started receiving a new benefit, or a disabling condition status changed).

Accessing & Running the [GNRL-409] Report in HMIS

The screenshot displays the Clarity Human Services - CLHS web application interface. The browser address bar shows the URL `scc.clarityhs.com/client/53DA21C1D/profile`. The client profile for Luke Skywalker Test is visible, with a navigation menu at the top and a sidebar on the right. The main content area is divided into three sections: Client Profile, Household Members, and Active Programs.

Client Profile

Field	Value
Social Security Number	***-**-XXXX
Quality of SSN	Client doesn't know
Last Name	Skywalker Test
First Name	Luke
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	08/26/1966
Adult Age	59
Middle Name	
Suffix	None
Alias	Test Client
Sex	Male
Gender	Culturally Specific Identity (e.g., Two-Spirit), Differ...
Race and Ethnicity	Hispanic/Latina/o
Additional Race and Ethnicity Detail	
Pronouns	Select
Veteran Status	Yes

Household Members

Member	Relationship
Grownup Adult child (He/Him/His)	Daughter

Active Programs

- Countywide Hotline Outreach
- test
- Hotline Outreach (VW OSH)

Recent Services

- Housing Transition Navigation Services...
- Housing Transition Navigation Services...
- Case Management Services - Columbus Pa...
- Housing Problem Solving Attempted: Pho...
- Housing Problem Solving Financial Assi...

Client Information

UNIQUE IDENTIFIER: 53DA21C1D

CHECK-IN

SEND MESSAGE

Report Output [GNRL-409] – Annual Assessment Overview

Annual Assessment Overview

Abode Services

Multiple Programs
Multiple Statuses

Date Range: 11/01/2025 thru 11/17/2025

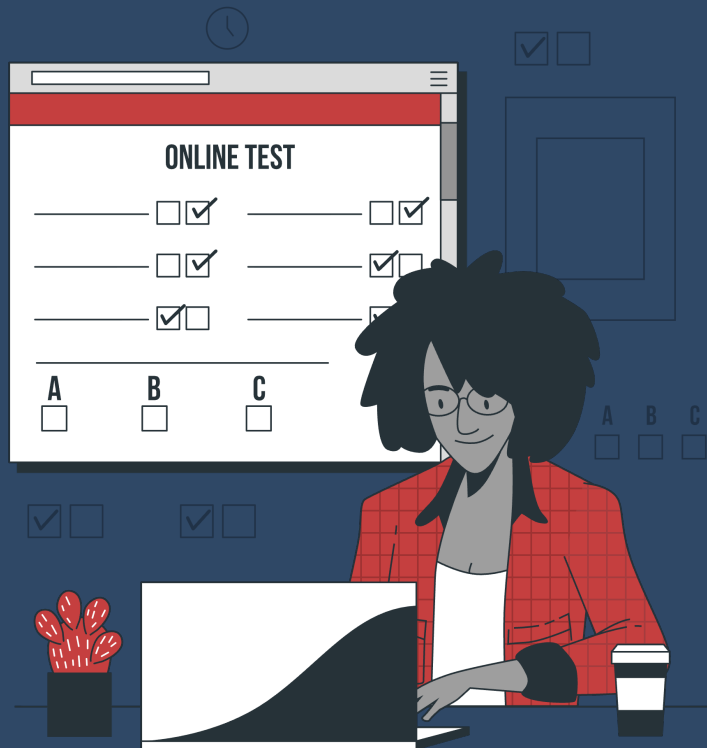
Abode OSC Non-Funded

Annual Assessment Overview

Annual Assessment Status	Completed	Completed Out of Range	Past Due	Due	Assessment Window Opening in 30 Days	Not Due	Enrolled Less than 1 Year	Data Issue	Exited Before HoH's 1st Anniversary
# of Assessments	191	2	7	0	22	15	0	0	0

Client Detail

Unique ID	Client Name	Relationship to HoH	Start Date	Exit Date	LOS	Expected Annual Assessment Count	Completed Annual Assessment Count	Last Annual Assessment Date	Last Annual Assessment Status	Next Annual Assessment Due	Next Annual Assessment Status	Assigned Staff	More Info
		Self	08/25/2018	-	2,642	7	6	-	Past Due	08/25/2026	Not Due	A. Tesfai	More Info
		Head of household's child	02/27/2019	-	2,456	7	6	-	Past Due	08/25/2026	Not Due	A. Tesfai	More Info
		Self	01/01/2018	-	2,878	7	7	01/01/2025	Completed	01/01/2026	Assessment Window Opening in 30 Days	W. Hoffer	More Info
		Self	01/01/2018	-	2,878	7	7	01/01/2025	Completed	01/01/2026	Assessment Window Opening in 30 Days	A. Tesfai	More Info
		Head of household's spouse or partner	01/01/2018	-	2,878	7	7	01/01/2025	Completed	01/01/2026	Assessment Window Opening in 30 Days	A. Tesfai	More Info
		Self	01/01/2018	-	2,878	7	7	01/01/2025	Completed	01/01/2026	Assessment Window Opening in 30 Days	A. Tesfai	More Info
		Head of household's child	01/01/2018	-	2,878	7	7	01/01/2025	Completed	01/01/2026	Assessment Window Opening in 30 Days	A. Tesfai	More Info
		Head of household's child	01/01/2018	-	2,878	7	7	01/01/2025	Completed	01/01/2026	Assessment Window Opening in 30 Days	A. Tesfai	More Info



Knowledge Test

Annual vs. Status Assessment



How Frequently Should An Annual Assessment Be Done?

- A. As soon as there is a change in the client's income, HoH or Health Insurance
- B. Every time I see the client; this way I have all the necessary details up to date
- C. Wait...we must complete Annual Assessments?
- D. Annually, specifically around the anniversary of the client's initial enrollment or service start date (often within a 30-day window before or after).



**Questions, Comments or
Concerns?**





Recommended Reports –

How to Determine DQ Errors



Recommended Reports – To Determine DQ Errors

[HUDX-227] Annual Performance Report

The **HUDX-227 Annual Performance Report (APR)** is one of the most critical documents for agencies that receive Continuum of Care (CoC) funding from the U.S. Department of Housing and Urban Development (HUD).

HUD System Performance Measures

[FY 2026]

Santa Clara County CoC

Client ID Selection: Clarity Unique Identifier

Date Range: 11/01/2025 thru 11/17/2025

Measure 1: Length of Time Persons Experience Homelessness

Measure 1a	Previous FY Universe (Persons)	Current FY Universe (Persons)	Previous FY Average LOT Experiencing Homelessness	Current FY Average LOT Experiencing Homelessness	Difference	Previous FY Median LOT Experiencing Homelessness	Current FY Median LOT Experiencing Homelessness	Difference
Persons in ES-EE, ES-NbN, and SH		3,416		300.96			205	
Persons in ES-EE, ES-NbN, SH, and TH		3,694		306.24			209	

Measure 1b	Previous FY Universe (Persons)	Current FY Universe (Persons)	Previous FY Average LOT Experiencing Homelessness	Current FY Average LOT Experiencing Homelessness	Difference	Previous FY Median LOT Experiencing Homelessness	Current FY Median LOT Experiencing Homelessness	Difference
Persons in ES-EE, ES-NbN, SH, and PH		3,462		1,750.44			819	
Persons in ES-EE, ES-NbN, SH, TH, and PH		3,741		1,733.57			791	

Measure 2a and 2b: The Extent to which Persons Who Exit Homelessness to Permanent Housing Destinations Return to Homelessness within 6, 12, and 24 months

	Total Number of Persons who Exited to a Permanent Housing Destination (2 Years Prior)	Number Returning to Homelessness in Less than 6 Months (0 - 180 d)	Percentage of Returns in Less than 6 Months (0 - 180 d)	Number Returning to Homelessness from 6 to 12 Months (181 - 365 d)	Percentage of Returns from 6 to 12 Months (181 - 365 d)	Number Returning to Homelessness from 13 to 24 Months (366 - 730 d)	Percentage of Returns from 13 to 24 Months (366 - 730 d)	Number of Returns in 2 Years	Percentage of Returns in 2 Years
Exit was from SO	48	1	2.08%	1	2.08%	3	6.25%	5	10.42%
Exit was from ES	72	4	5.56%	1	1.39%	12	16.67%	17	23.61%
Exit was from TH	1	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Exit was from SH	2	0	0.00%	0	0.00%	0	0.00%	0	0.00%
Exit was from PH	148	5	3.38%	7	4.73%	11	7.43%	23	15.54%
TOTAL Returns to Homelessness	271	10	3.69%	9	3.32%	26	9.59%	45	16.61%

[HUDX-227] Annual Performance Report – Compliance & Accountability

SUBMISSION



Recipients of CoC funding (including Supportive Housing, Shelter Plus Care, and CoC Program grants) are **required** to submit this report annually to HUD via the Sage HMIS Reporting Repository (and previously via e-snaps).

FUNDING



Failure to submit a complete and accurate APR on time can **jeopardize future** funding, lead to a loss of current grant funds, or result in monitoring findings.

PERFORMANCE



It serves as the official document that demonstrates to HUD **how the grant money was spent**, the activities that were conducted, and the results that were achieved against the objectives outlined in the grant agreement.

[HUDX-227] Annual Performance Report – Outcomes & Success

CLIENTS SERVED

The total number of people and households served during the reporting period.



DEMOGRAPHIC

Detailed information on the client population, such as race, ethnicity, age, and veteran status.



OUTCOMES

Housing Stability
Income Increases
Acquired Non-Cash Benefits



UTILIZATION

Data on the average length of time clients stay in the program and bed utilization rates.



Recommended Reports – To Determine DQ Errors

[HUDX-225] HMIS Data Quality Report

The **HUDX-225 HMIS Data Quality Report** is a critical, internal tool for Continuum of Care (CoC) grantees and homeless service providers.

While the HUDX-227 Annual Performance Report (APR) tells the story of **program outcomes**, the HUDX-225 tells the story of **how well the data was collected** to support those outcomes.

Q2. Personally Identifiable Information (PII)

Program Applicability: All Projects

Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name (3.01)	7	8	8	23	2.24%
Social Security Number (3.02)	479	19	4	502	48.88%
Date of Birth (3.03)	0	0	17	17	1.66%
Race and Ethnicity (3.04)	2	0		2	0.19%
Overall Score				504	49.07%

[HUDX-225] HMIS Data Quality Report – Compliance & Auditing

ERRORS



The report specifically highlights records where key data elements are **missing**, recorded as **"Client Doesn't Know,"** or contain **invalid information** (like an improperly formatted Social Security Number).

FINANCES



Poor data quality poses significant risks, including reduced funding, negative outcomes in external audits or monitoring by organizations, and an inability to accurately report project performance and demonstrate compliance with HUD's standards.

VALIDATION



The data quality tables within the HUDX-225 feed directly into the accuracy of other high-stakes federal reports, such as the APR (HUDX-227), (ESG-CAPER), and (LSA).

[HUDX-227] HMIS Data Quality Report – Staff Focus Efforts

PII

Personally Identifiable Information (PII):

Name, Date of Birth, Social Security Number, and Gender. Errors here can lead to duplicate client records.



UDE's

Universal Data Elements (UDEs):

Veteran Status, Disabling Condition, Race, Ethnicity, and Prior Living Situation. Errors here compromise the ability to correctly identify and prioritize clients (e.g., chronically homeless individuals).



INCOME & HOUSING

Income Sources, Income Amount, and Destination at Exit. Errors here are crucial because grant success is often measured by the client's ability to increase income and achieve stable housing.



Recommended Reports – To Determine DQ Errors

[GNRL-106] Program Roster Report

The **[GNRL-106] Program Roster Report** is a fundamental, internal administrative tool within the Homeless Management Information System (HMIS).

Its importance is primarily in **operational management** and **data quality assurance** at the individual program level.

Program Roster Report										Abode Services			
										Active within 11/01/2025 thru 11/17/2025			
Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, <input type="checkbox"/> = Non PH Project, A: Assessments, S: Services, CN: Case Notes You can find more information about adjusted Move-In Date at the Help Center Article													
Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.													
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	As
Program: Abode OSC Non-Funded													
			31	38	08/25/2018	-	2,642	08/25/2018	9	14	0	A. Tesfai	
			11	18	02/27/2019	-	2,456	02/27/2019	10	1	0	A. Tesfai	
			38	46	01/01/2018	-	2,878	01/01/2018	11	87	1	W. Hoffer	
			59	67	01/01/2018	-	2,878	01/01/2018	12	11	0	A. Tesfai	
			41	49	01/01/2018	-	2,878	01/01/2018	9	4	0	A. Tesfai	
			40	48	01/01/2018	-	2,878	01/01/2018	11	17	0	A. Tesfai	
			9	16	01/01/2018	-	2,878	01/01/2018	9	3	0	A. Tesfai	
			13	21	01/01/2018	-	2,878	01/01/2018	10	3	0	A. Tesfai	
			54	62	01/01/2018	-	2,878	01/01/2018	9	37	1	A. Tesfai	
			24	32	01/01/2018	-	2,878	01/01/2018	9	9	0	A. Tesfai	
			54	62	01/01/2018	-	2,878	01/01/2018	9	9	0	A. Tesfai	
			54	62	01/01/2018	-	2,878	01/01/2018	12	8	0	A. Tesfai	
			24	32	01/01/2018	-	2,878	01/01/2018	8	0	0	W. Hoffer	
			67	75	01/01/2018	-	2,878	01/01/2018	11	12	0	A. Tesfai	
			49	56	01/01/2018	-	2,878	10/26/2018	11	2	0	A. Tesfai	
			10	18	01/01/2018	-	2,878	10/26/2018	7	0	0	A. Tesfai	
			30	38	01/01/2018	-	2,878	01/01/2018	9	13	0	A. Tesfai	
			38	46	01/01/2018	-	2,878	01/01/2018	9	6	0	A. Tesfai	
			32	40	01/01/2018	-	2,878	01/01/2018	8	22	0	A. Tesfai	
			10	18	01/01/2018	-	2,878	01/01/2018	6	1	0	A. Tesfai	
			59	67	01/01/2018	-	2,878	01/01/2018	10	12	1	A. Tesfai	
			65	68	05/09/2023	-	924	05/09/2023	3	8	0	W. Hoffer	
			59	66	03/15/2019	-	2,440	03/15/2019	8	27	0	W. Hoffer	
			32	38	10/23/2019	-	2,218	10/23/2019	8	56	0	W. Hoffer	
			77	85	01/01/2018	-	2,878	01/01/2018	9	33	0	W. Hoffer	
			31	36	07/31/2020	-	1,936	07/31/2020	7	26	0	A. Tesfai	
			74	79	09/22/2020	-	1,883	09/22/2020	8	8	0	W. Hoffer	
			36	40	04/28/2021	-	1,665	05/03/2021	6	4	0	A. Tesfai	
			59	63	05/21/2021	-	1,642	05/21/2021	5	1	0	A. Tesfai	

GNRL-106] Program. Roster Report – Management & Daily Operation

CASELOAD

10

Active Caseload

Review: It is the primary tool for case managers and program supervisors to review their **active clients**. This helps ensure all clients currently being served have a valid, open enrollment in HMIS.

MISSING DATA



Identify Missing

Entries: It helps staff quickly identify clients who are receiving services but may have been missed during the intake process and need an enrollment record created.

VALIDATION



Track Length of Stay

(LOS): The report clearly shows the **Enroll Date**, **Exit Date**, and **Length of Stay (LOS)** for each client, allowing managers to monitor if clients are approaching the maximum time limit for a program (like Transitional Housing).

[GNRL-106] Program Roster Report – Staff Focus Efforts

EXITS

Missing Exits: It is crucial for identifying clients who have **left the program but were not properly exited** in the system.

An active enrollment for a client who has moved out can lead to inaccurate reporting, inflated LOS figures, and an overcount of the active homeless population.

MOVE-IN-DATE

Missing Housing Move-in Dates: For Permanent Housing (PH) projects, the report includes the **Housing Move-in Date**.

Managers use this to ensure that this mandatory data element is accurately entered, as it is a core performance measure for federal housing grants.

ASSESSMENTS SERVICES

Assessment & Service Counts: It often includes counts of **Status/Annual Assessments** and **Services/Case Notes** completed.

This allows supervisors to verify that staff are meeting programmatic and data collection requirements (e.g., confirming a client has received their mandated annual assessment).



**Questions, Comments or
Concerns?**





Knowledge Test

Report Knowledge



Report Knowledge – Using Reports

Q

You want a list of clients who have a **Housing Move-In Date on 2/14/2025**.

How would you pull this information?

Where would you start? What reports would you use?

Q

You decide to do Data Quality checks to see what clients are missing Universal Date Elements (UDEs).

How would you pull this information?

Where would you start? What reports would you use?





Hands – On Practicum



Resources - Want to learn more...check these out

Clarity Human Services Help Center

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

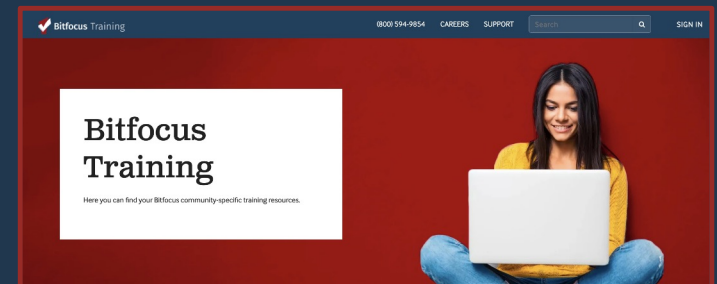
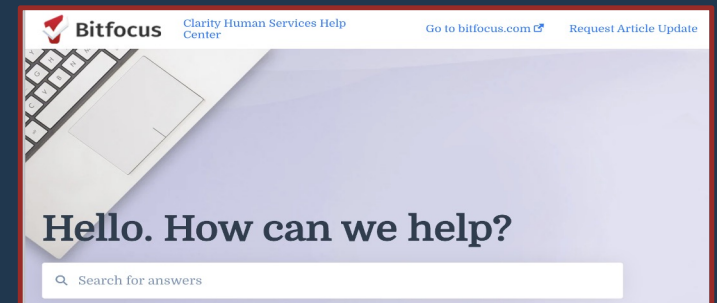
Introduction to the Data Analysis Tool & Looker Resources

Bitfocus Training

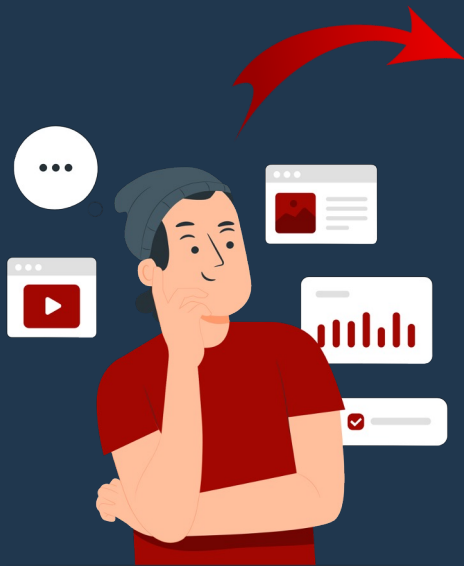
Here you can find your Bitfocus community-specific training resources

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.



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

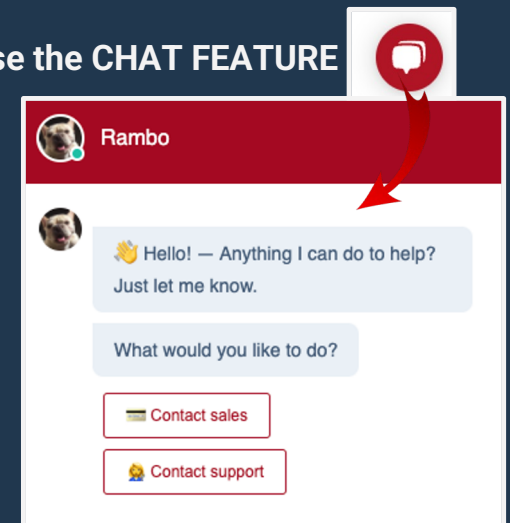
Phone:

- (408) 596.5866 EXT. 2

Your Sys. Admin Team

- scc-admin@bitfocus.com

Use the CHAT FEATURE



**Images provided by Storyset.com*



**Questions, Comments or
Concerns?**





**Please help us improve these trainings by completing
this post-event survey before you go:
<https://bitfocus.typeform.com/to/sOGCUcSx>**