SANTA BARBARA COUNTY CONTINUUM OF CARE

HMIS Data Quality Report Manual

COUNTY of SANTA BARBARA
HOUSING & COMMUNITY DEVELOPMENT

August 2025

Data Analysis: Data Quality Dashboard

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There are a limited number of enrollment issues that will not be visible when you try to edit an enrollment.

Examples: 3.10 Project Start Date issue count, and 3.16 Enrollment CoC issue count.

Bitfocus is working on correcting these visibility issues.

If the Data Quality Dashboard highlights a potential enrollment issue, but you cannot fix the issue, submit a Help Desk ticket at https://ctagroup.org/santa-barbara-hmis/help-desk-request/

If possible, we will provide a solution while Bitfocus works on correcting these visibility issues.

Overview: Data Quality Dashboard

Purpose

The **Data Quality Dashboard** uses the HUD Data Elements to review data completion and data quality. This dashboard contains information to help maintain and obtain data quality consistent with HUD standards re: Universal data elements, Program specific data elements, and Federal Partner program elements.

The dashboard is broken down into 8 sections, including the following:

1. Enrollment/client counts
2. Universal data elements
3. Program specific data elements
4. Individual Federal Partner program elements
5. System Administration access

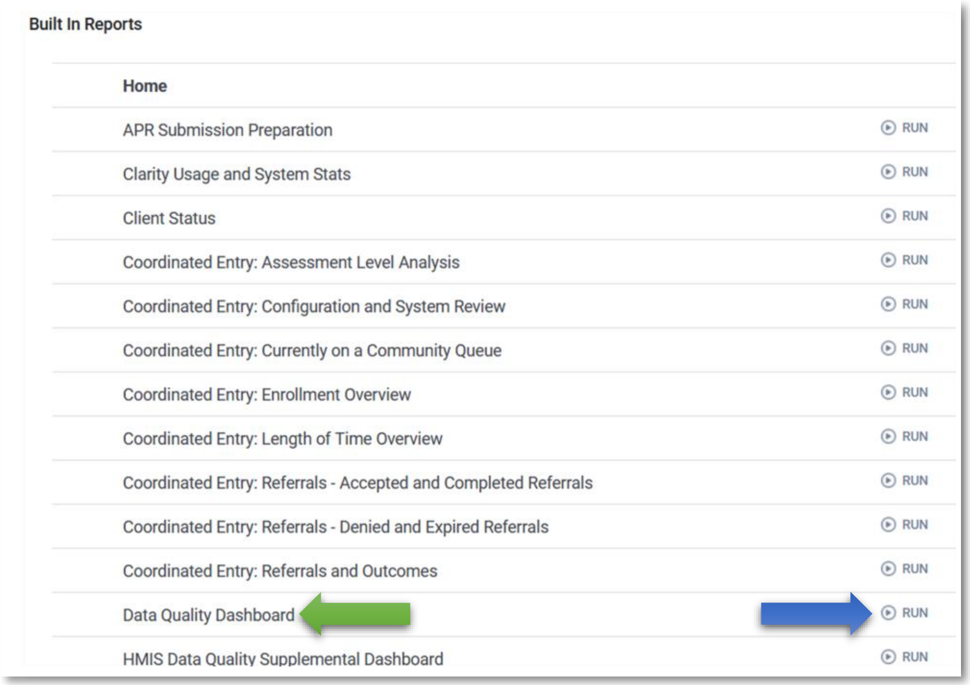
Who can access this report?

Users whose access levels enables use of the Data Analysis tool.

Location

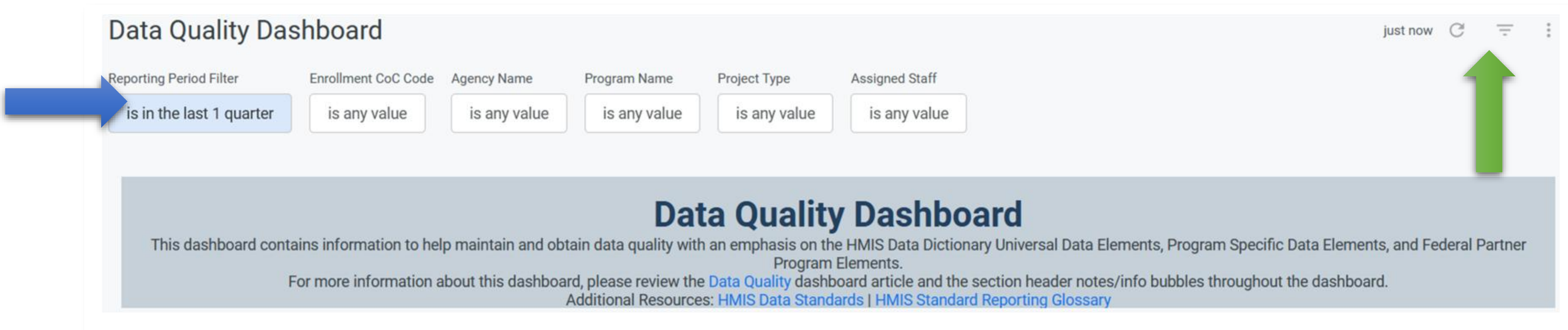
The **Data Quality Dashboard** is located in the **Built in Reports** folder. To access the folder:

- Click square icon (top right of page)
- Click **Reports**
- Click **Data Analysis**, then click **Built in Reports**
- Locate **Data Quality Dash**board (green arrow)
- Click **Run** (blue arrow) to display the dashboard



Data Quality Dashboard: Filters

It may take several minutes for the **Data Quality Dashboard** to display after clicking **Run**. Once the dashboard displays, the following will be at the top of the page:



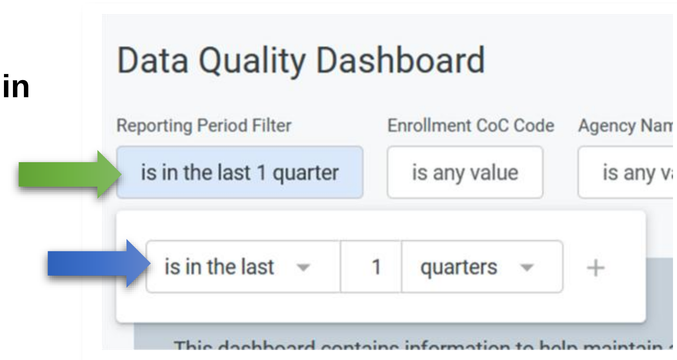
Filters (blue arrow)
You can modify any filter by clicking on the filter. Click:

- **Reporting Period Filter** to change the date range. For example: click on **is in the last 1 quarter**, then select **is in range** to enter in a specific date range, such as 01/01/2025 to 07/31/2025
- **Enrollment CoC:** click **is any value** to select **CA-603**. Note: dashboard defaults to **CA-603**, so no need to change this filter
- **Agency Name:** click **is any value** to select 1 or more agencies. That is, to not include all agencies in the CoC
- **Program Name:** click **is any value** to select 1 or more programs
- **Project Type**: click **is any value** to select one or more project types. Example: Emergency Shelter-Entry/Exit
- **Assigned Staff**: click **is any value** to select one or more staff

Action Items (green arrow)

- **Circle with arrow**: Click to rerun the dashboard
- **Three lines/triangle shape**: click to hide filters. Click again to display filters
- **Three vertical dots**: click to select: **Clear Cache and Refresh**, **Download**, or **Reset Filters**

Filters

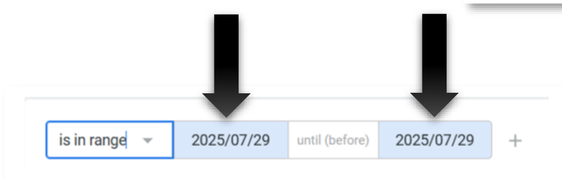


To customize any filter, click on the filter you want to customize. For example: To change the **Reporting Period Filter** (green arrow), click **is in the last 1 quarter**.

- A drop-down menu will display (blue arrow)
- Each of the 3 boxes (**is in the last, 1, quarters**) are customizable

To select a date range:

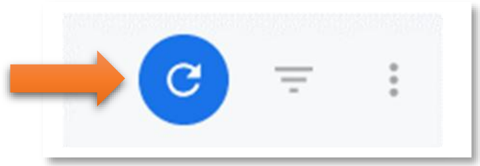
- Click **is in the last 1 quarter**
- A drop-down menu will appear
- Click on **is in range**
- To change the dates (black arrows), click on 2025/07/29, then click on the calendar icon. Select a date, then repeat the process for 2025/07/29
- Click anywhere on the dashboard to exit the filter



Customizing any of the other filters is similar to the above. Once you have customized all the filters you want to customize, rerun the dashboard.

How do I rerun the dashboard?

Locate the blue circle with an arrow icon (orange arrow)



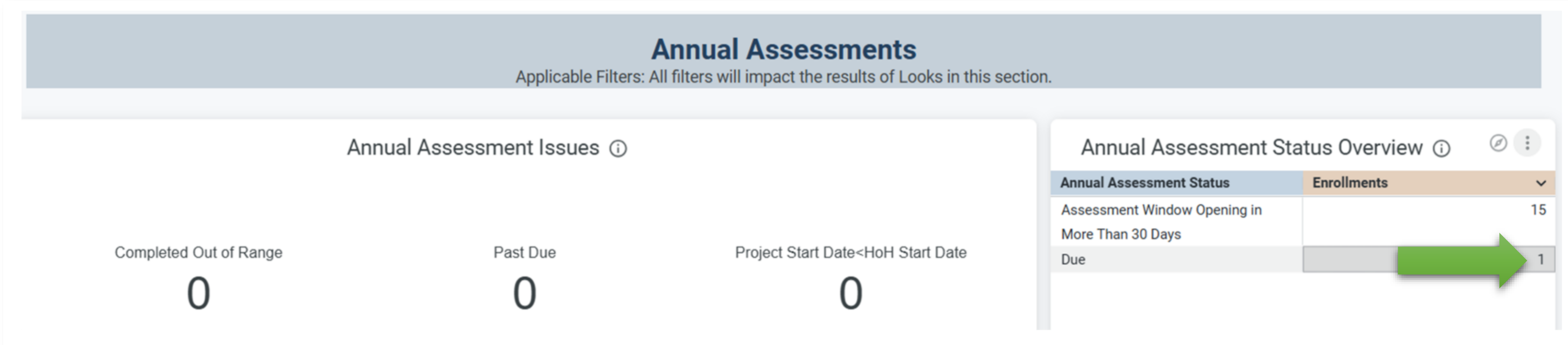
- Click the blue circle.
- The dashboard will then rerun
- It may take several minutes for the dashboard to refresh
- The blue circle will turn white when the dashboard is finished refreshing

A blue circle means one or more filters have been changed. Click on the blue circle to rerun the dashboard.

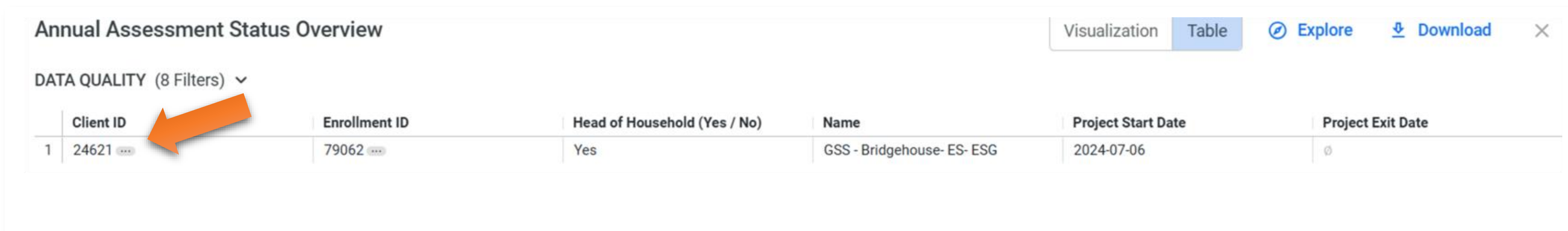
A white circle means no changes to any filter since the dashboard was created.

Data Quality Dashboard: Drill Downs

The **Dashboard** has drill down capability. In most instances, you can click on a number to reveal more data. For example: in the **Annual Assessments section**, the report states 1 client (green arrow) is due for their annual assessment.



- Click on 1 (green arrow)
- The page will refresh. **<u>The drill down page may appear blank</u>**
- Scroll to the top of the page to see the data



- In this example: client 24621 (orange arrow) is due their annual assessment
- Click on **24621** (orange arrow), then click on **Clarity Profile.** The client's profile page will display
- Based on the data provided in this section, this client has been enrolled in a program for over a year and no annual assessment has been entered
- To resolve this issue: enter an annual assessment for the client in their enrollment

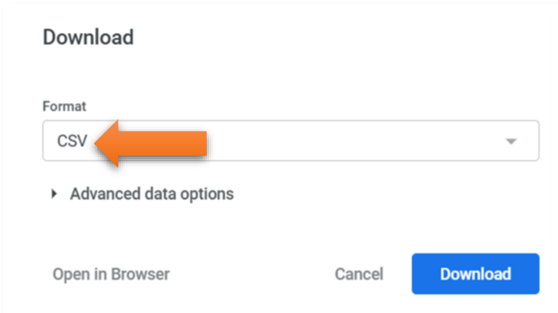
Data Quality Dashboard: Drill Downs

There are 3 other features on the drill down page:

1. **Explore** (blue arrow): Click if you want to see how this section of the dashboard was created in Looker
2. **Download** (green arrow): Click to download data to Excel (or other format)
3. **X** (black arrow): Click to return to the **Dashboard**

Clicking **Download** (green arrow) to display

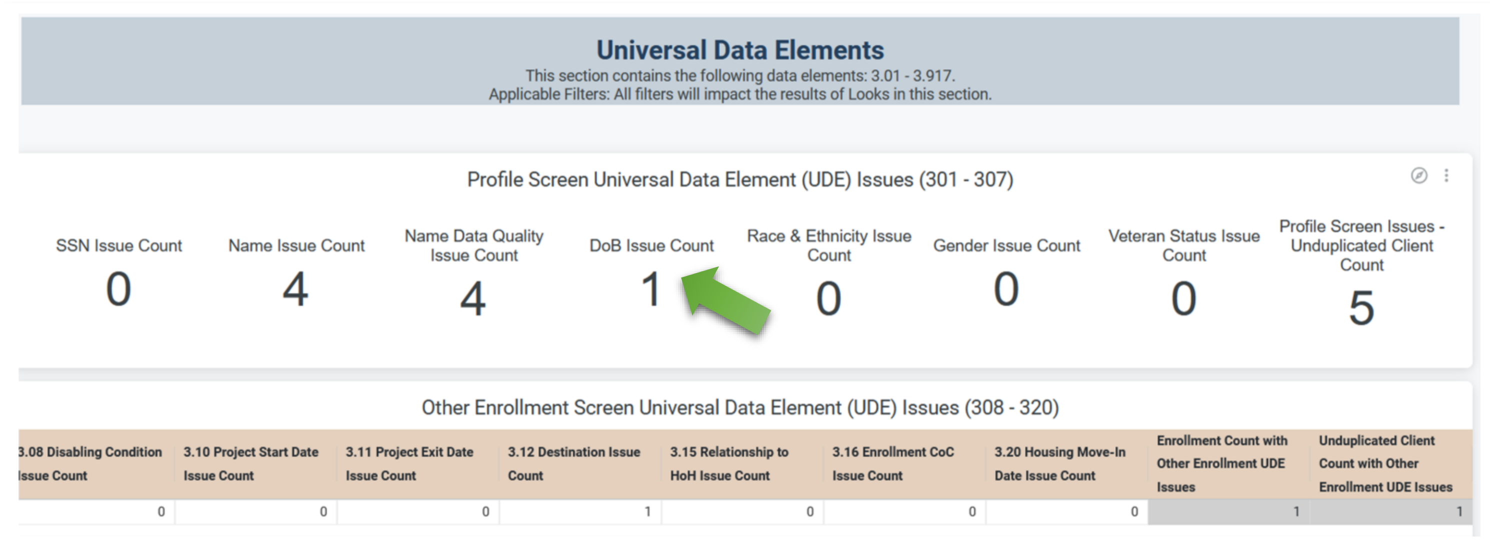
- **Format**: click CSV (orange arrow) to display drop-down menu
- Select Excel (or other format)
- Click **Download**
- Follow your browser's prompts to access the spreadsheet



Universal Data Elements

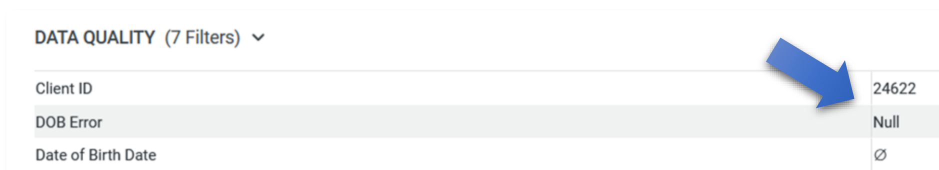
The first section of the **Data Quality Dashboard**: **Universal Data Elements**. There are 3 sections:

1. **Profile Screen Universal Data Elements** (see below)
2. **Other Enrollment Screen Universal Data Elements**
3. **Other Enrollment Screen – Prior Living Situation**



If a number (1 or higher) appears under a **Profile Screen Universal Data Element**, click on that number to investigate. Example: the number 1 appears under **DoB Issue Count** (green arrow):

- Click on the 1
- The page will refresh and the <u>**page may appear blank**</u>
- Scroll up to the top of the page to see data
- **DoB Error** is listed as **Null** (blue arrow)
- Click on **Client ID** (above **Null**, blue arrow)
- A pop-up window will appear. Click on **Clarity Profile** to access client's profile



Universal Data Elements

A new tab opens. It may take a minute or more for the page to refresh after clicking on **Clarity Profile**. The client's **Profile** page will display.

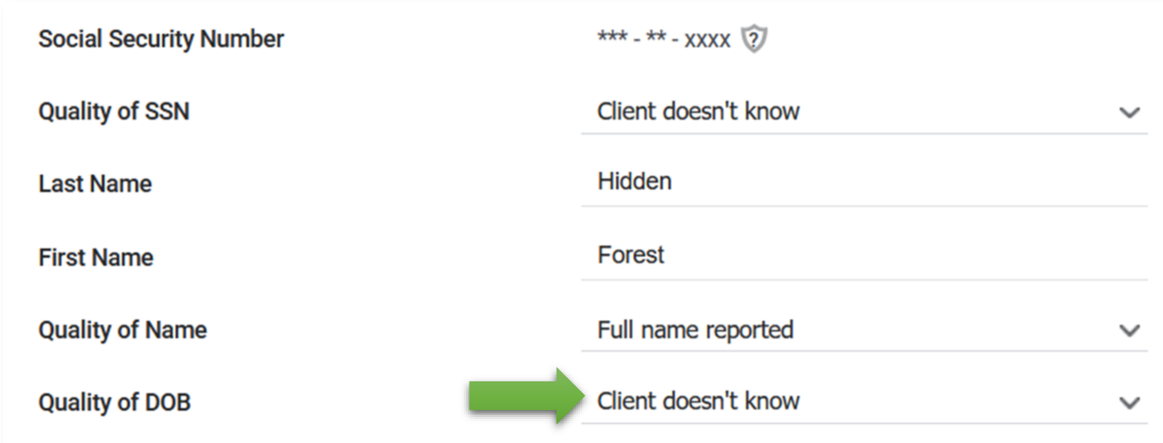
In this example, the **potential** error is because **Client doesn't know** was selected (green arrow)

HUD considers **Client doesn't know**, **Client prefers not to answer**, and **Data not collected** as potential errors.

Are these always errors?
No. If client doesn't know, then **Client doesn't know** is the correct answer.

When the potential data quality error is **Client doesn't know** or **Client prefers not to answer**, use your best judgement to determine if answer is correct or if it needs to be changed.

Data not collected: This means the client was not asked the question. Select this answer as little as possible. However, sometimes this is the only answer. Example: A client disappears. You exit them from your program. Since they disappeared you do not know their destination, so **Data not collected** would be entered for Destination.



Let's say the client does know their DoB. To update their Profile with **DoB**:

- Click on **Client doesn't know** (green arrow)
- Select **Full DoB Reported**
- Enter in their DoB (day/month/year)

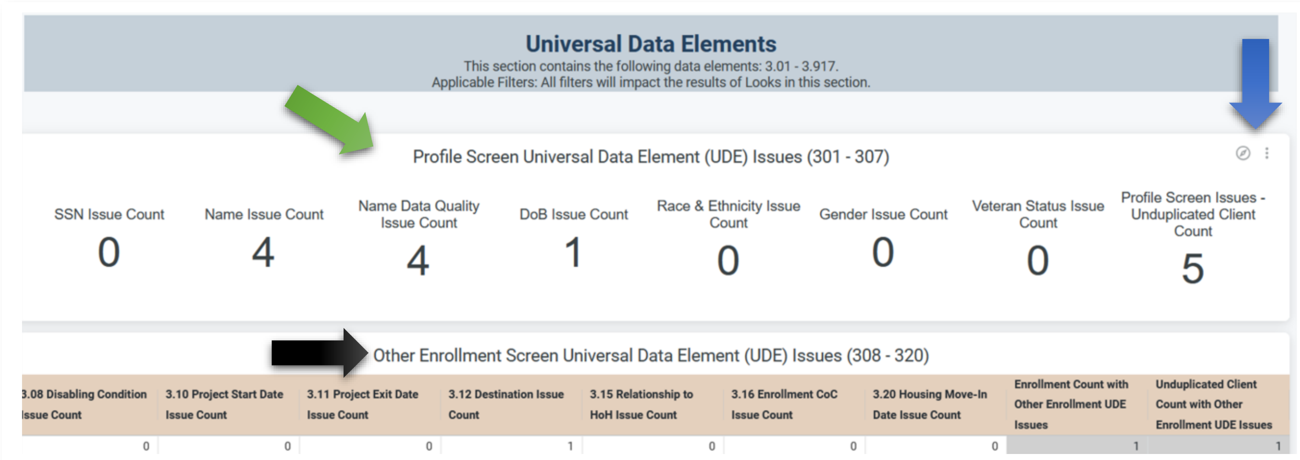
If the client isn't sure about the exact date, then select **Approximate or Partial DoB Reported**. Enter 01/01 for day and month, then enter the year the client thinks they were born

- Click **Save Changes**
- A pop-up window may appear asking you to confirm changes. Click **OK**
- Close the tab
- Continue to look at other potential data quality errors and make corrections if necessary

Universal Data Elements: Clear Cache & Refresh

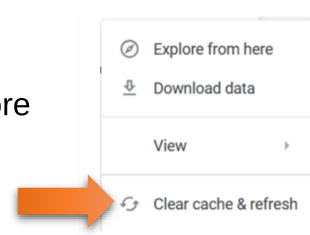
After making corrections, you can **Clear Cache & Refresh** (update) to see if error(s) have been resolved.

Clear Cache & Refresh
Place your cursor anywhere within the **Profile Screen Universal Data Element** section (green arrow).



Two icons appear (blue arrow). Click 3 vertical dots to reveal a drop-down menu:

- Click **Clear cache & refresh** (orange arrow)
- This section will update. It may take a minute or more
- If errors were corrected, you will see a 0
- For example, if the **DoB Issue Count** error was corrected, a 0 (zero) will display



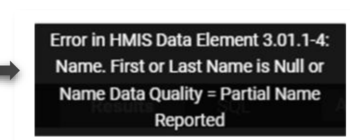
Selecting **Clear cache & refresh** within a section will update data only in that section.

Want to update the entire Dashboard?

- Scroll to the top of the page
- Click the 3 vertical dots below your name (top right of page)
- Click Clear cache & refresh
- All sections of the Dashboard will update

There are 3 other actions:

- **Explore from here**: Click to review how an error is calculated. Example: scroll over **Name Error Count** listed under **Other Enrollment Screen Universal Data Elements** (black arrow) and the following will display



- **Download data**: Click to download into Excel (other formats can be selected)
- **View**: Click, then click on **Expanded** to make the font size bigger

Data Quality Dashboard: Remaining Sections

Program Specific Data Elements
This section looks at data elements associated with income, non-cash benefits, health insurance, & disabilities.

Data quality errors usually stem from incomplete or inaccurate income records. Example: **Yes** selected for **Income from any source**, but no type (example: Earned Income) or amount was entered.

Individual Federal Partner Program Elements (HOPWA, PATH, RHY, SSVF)

Each of these funding sources have data elements specific to their funding source.

This section looks at data elements associated with HOPWA, PATH, RHY, and SSVF. If any of these federal partners are not a funding source, then each listed data element will display a zero.

Correcting potential data quality errors:
Follow the workflow as described for the Universal Data Elements section (pages 6-8).

As with the Universal Data Elements section, every number in each of the remaining sections (detailed on this & the next page) is a drill down. That is, click on the number to reveal more information.

There may be no errors to fix in a section. Example: if you are not funded by HOPWA, PATH, RHY, or SSVF, then the Individual Federal Partner sections do not apply.

For any issues detailed in the System Administrator Access Required: submit a Help Desk ticket by going to https://ctagroup.org/santa-barbara-hmis/help-desk-request/

Annual Assessments
This section details counts of annual assessments that were completed out of range, past due, and had project start dates that were before the head of household's start date.

Data Entry Timelines
This section contains the counts and percents of project starts, annual assessments, and project exits that fall within the various timelines based on the Q6 timelines table. The Q6 timelines table is part of the CoC APR.

Take the time to review your data entry timelines. The goal is to enter data as soon as possible in order to minimize data quality errors.

There is nothing that can be done at this point to change the data contained in this section.

Data Quality Dashboard: Remaining Sections

Potential Exits & Long Stayers
This section details clients whose enrollments have no activity for a year or more. This section also details clients that have a longer than average length of time.

Review the list of clients to determine if exit data has not been entered in HMIS for any client no longer in a program. If a client has exited, but exit data has not been entered in HMIS, enter exit data for that client.

Correcting potential data quality errors:
Follow the workflow as described for the Universal Data Elements section (pages 6-8).

There may be no errors to fix in one or more sections. Example: if you are not funded by HOPWA, PATH, RHY, or SSVF, then the Individual Federal Partner sections do not apply.

For any issues detailed in the System Administrator Access Required: submit a Help Desk ticket by going to https://ctagroup.org/santa-barbara-hmis/help-desk-request/

System Administrator Access Required
Potential data quality errors listed in this section can only be addressed by a System Administrator. File a Help Desk ticket for any issues that need to be addressed. For example: if there are duplicate clients, then submit a ticket with the client IDs to merge. Help Desk tickets can be submitted by going to https://ctagroup.org/santa-barbara-hmis/help-desk-request/