SANTA BARBARA COUNTY CONTINUUM OF CARE

HMIS Data Quality Report Manual

August 2025

Data Analysis: Program Performance Dashboard

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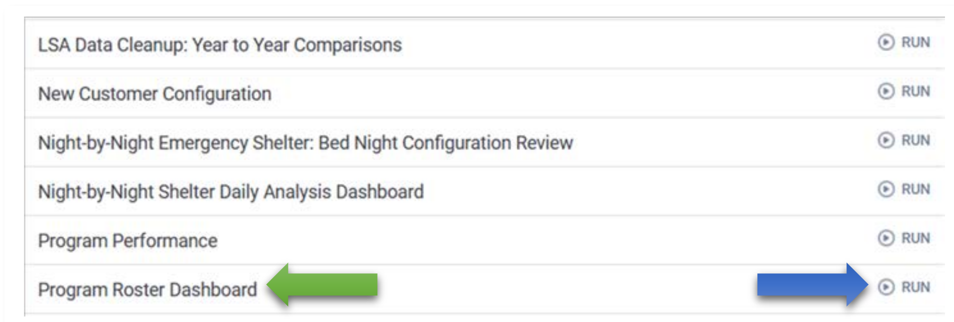
Overview: Program Performance Dashboard

Purpose
The **Program Performance Dashboard** encourages performance review and analysis on a program basis. This dashboard provides details about a program's performance, enables conversations about system-wide improvements, and data quality completion and compliance.

The dashboard highlights data point within 6 sections:
1. Persons served
2. Length of time in program
3. Obtaining/Increasing/Maintaining Income & Non-Cash Benefits
4. Average program utilization
5. Housing Move-In date review
6. Data quality

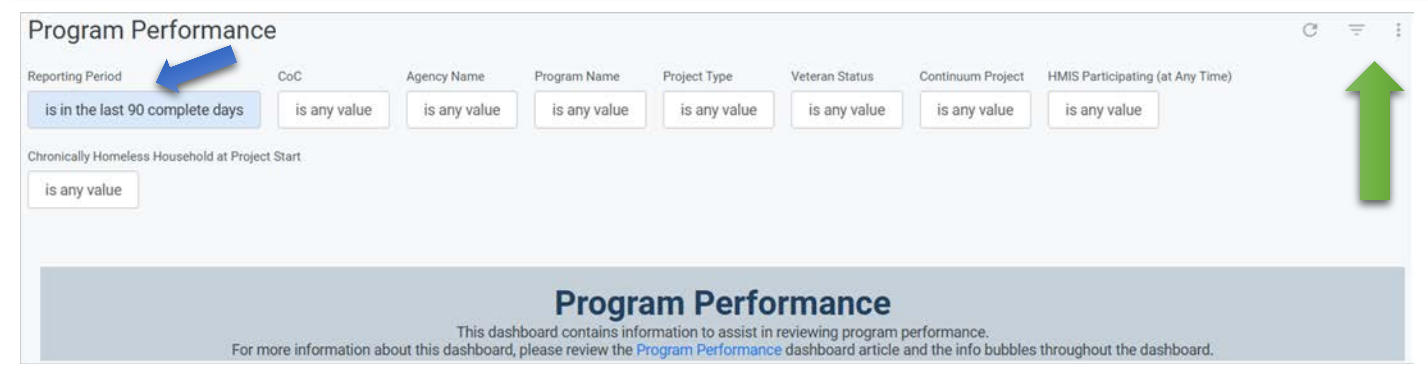
Who can access this report?
Users whose access levels enables use of the Data Analysis tool.

Location
The **Program Performance 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 **Program Performance** (green arrow)
- Click **Run** (blue arrow) to display the dashboard



Data Quality Dashboard: Filters

It may take several minutes for the **Program Performance 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:

- **Reporting Period:** Click to change the date range. For example: click on **is in the last 90 complete days**, then select **is in range** to enter in a specific date range
- **CoC:** No need to change. Dashboard defaults to **CA-603** (Santa Barbara CoC)
- **Agency Name:** click **is any value** to select 1 or more agencies. That is, not to include all agencies
- **Program Name:** click **is any value** to select 1 or more programs
- **Veteran Status:** click **is any value** to select **Yes** or **No**
- **Continuum Project**: click **is any value** to select **Yes**
- **HMIS Participating (at any time)**: click **is any value** to **HMIS Participating**
- **Chronically Homeless Household at Project Start**: click **is any value** to select **Yes** or **No**

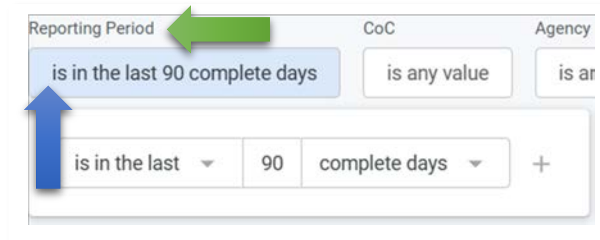
Action Items (green arrow)

- **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**

What is a Continuum Project?
HUD defines it as a program whose purpose is to provide housing &/or services for individuals and families experiencing homelessness or at-risk of experiencing homelessness and is identified by the Continuum as part of its service system.

What is HMIS Participating?
It means a program is entering data in HMIS. This involves recording information about individuals and families experiencing homelessness or at risk of homelessness.

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 90 complete days**.

- A drop-down menu will display (blue arrow)
- Each of the 3 boxes (**is in the last, 90, complete days**) are customizable

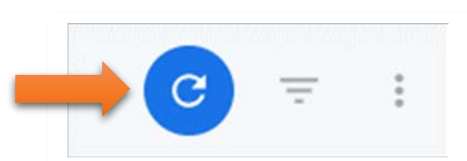
To select a date range:

- Click **is in the last 90 complete days**
- 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.

Program Performance: Drill Downs

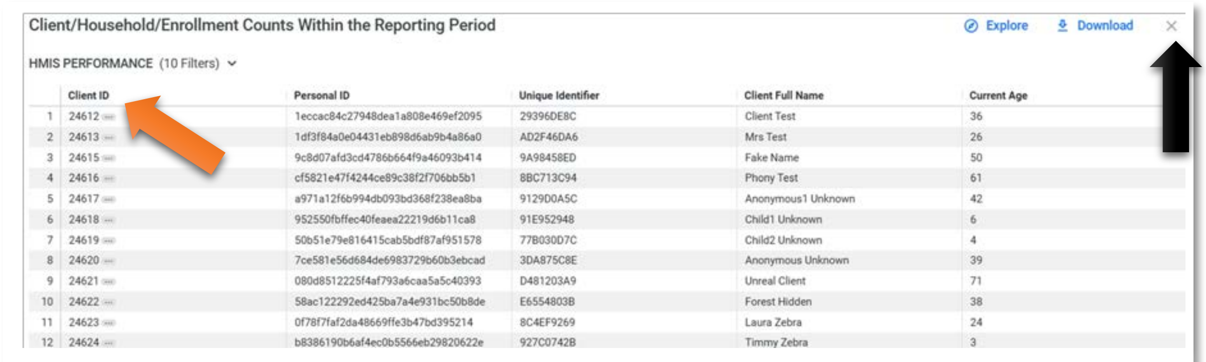
The **Dashboard** has drill downs. Click on a number to reveal data. Example: in the **Person Served section**, the report states a client count of 12 (green arrow).

- Click on 12 (green arrow)
- The page will refresh. **Page may appear blank**
- Scroll to the top of the page to see the data

The **Client ID** column (orange arrow) is a drill down. If you want to access the **Profile** page for any client listed:

- Click on a client ID
- Click **Clarity Profile** to display the client's **Profile**

Click the **X** (black arrow) to return to the Dashboard.


Client/Household/Enrollment Counts Within the Reporting Period

Explore Download

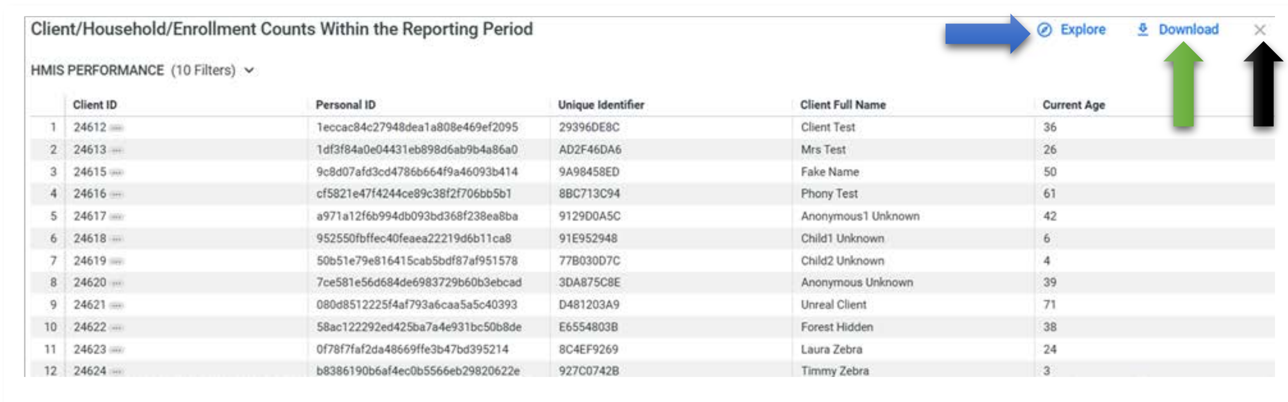
HMIS PERFORMANCE (10 Filters)

	Client ID	Personal ID	Unique Identifier	Client Full Name	Current Age
1	24612	1eccac84c27948dea1a808e469ef2095	29396DE8C	Client Test	36
2	24613	1df3f84a0e04431eb898d6ab9b4a86a0	AD2F46DA6	Mrs Test	26
3	24615	9c8d07afd3cd4786b664f9a46093b414	9A98458ED	Fake Name	50
4	24616	cf5821e47f4244ce89c38f2f706bb5b1	8BC713C94	Phony Test	61
5	24617	a971a12f6b994db093bd368f238ea8ba	9129D0A5C	Anonymous1 Unknown	42
6	24618	952550fbffec40feaea22219d6b11ca8	91E952948	Child1 Unknown	6
7	24619	50b51e79e816415cab5bdf87af951578	77B030D7C	Child2 Unknown	4
8	24620	7ce581e56d684de6983729b60b3ebcad	3DA875C8E	Anonymous Unknown	39
9	24621	080d8512225f4af793a6caa5a5c40393	D481203A9	Unreal Client	71
10	24622	58ac122292ed425ba7a4e931bc50b8de	E6554803B	Forest Hidden	38
11	24623	0f78f7faf2da48669ffe3b47bd395214	8C4EF9269	Laura Zebra	24
12	24624	b8386190b6af4ec0b5566eb29820622e	927C0742B	Timmy Zebra	3

Program Performance: Drill Downs

There are 3 other features on the drill down page:

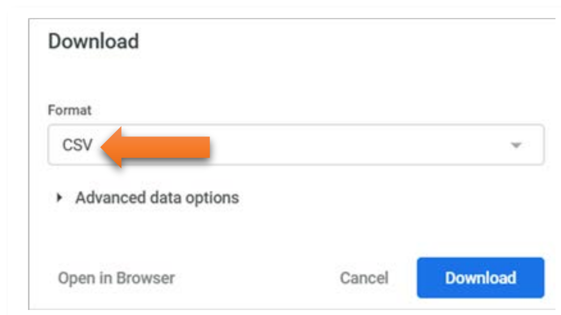
1. **Explore** (blue arrow): Click if you want to see how this section of the dashboard was created in Looker
2. **Download** (green arrow): Click to download data to Excel (or other format)
3. **X** (black arrow): Click to return to the **Dashboard**



	Client ID	Personal ID	Unique Identifier	Client Full Name	Current Age
1	24612	1eccac84c27948dea1a808e469ef2095	29396DE8C	Client Test	36
2	24613	1df3f84a0e04431eb898d6ab9b4a86a0	AD2F46DA6	Mrs Test	26
3	24615	9c8d07afd3cd4786b664f9a46093b414	9A98458ED	Fake Name	50
4	24616	cf5821e47f4244ce89c38f2f706bb5b1	8BC713C94	Phony Test	61
5	24617	a971a12f6b994db093bd368f238ea8ba	9129D0A5C	Anonymous1 Unknown	42
6	24618	952550fbffec40feaea22219d6b11ca8	91E952948	Child1 Unknown	6
7	24619	50b51e79e816415cab5bdf87af951578	77B030D7C	Child2 Unknown	4
8	24620	7ce581e56d684de6983729b60b3ebcad	3DA875C8E	Anonymous Unknown	39
9	24621	080d8512225f4af793a6caa5a5c40393	D481203A9	Unreal Client	71
10	24622	58ac122292ed425ba7a4e931bc50b8de	E6554803B	Forest Hidden	38
11	24623	0f78f7faf2da48669ffe3b47bd395214	8C4EF9269	Laura Zebra	24
12	24624	b8386190b6af4ec0b5566eb29820622e	927C0742B	Timmy Zebra	3

To download the data to Excel (or other format):

- Click **Download** (green arrow)
- **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



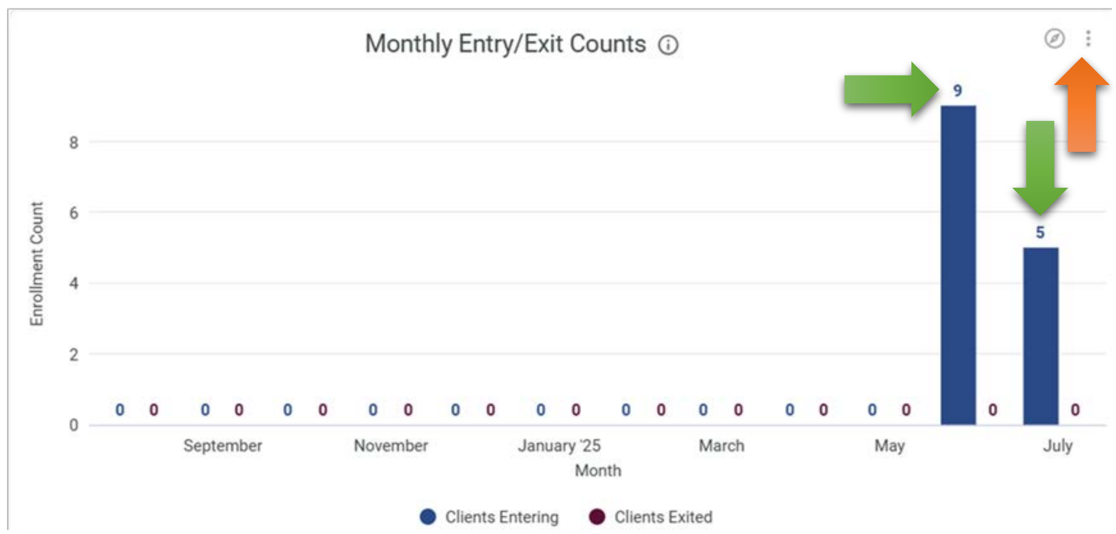
Section 1: Persons Served

There are 3 sections:

1. **Client Household/Enrollment** (see page 6 for details): Details annual enrollment counts for the past 5 years, plus the current year.
2. **Monthly Entry/Exit Counts**: Count of entries & exits over the past 13 months
3. **Inbound Recidivism – Returners**: Count of clients within the reporting period previously enrolled with the same program(s) within the past 2 years
4. **First Time in System/Same Program**: Percent of clients enrolled within the reporting period for first time in HMIS

The **Monthly Entry/Exit Counts** is shown here. Click on a number (green arrows) to reveal drop down:

- **Explore** (click to display clients) <u>**The page may appear blank**</u>. Scroll to the top to see data
- **Drill** (click to display over time. <u>**The page may appear blank**</u>. Scroll to the top to see data



Additional features can be assessed by clicking on the 3 dots (orange arrow)

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**

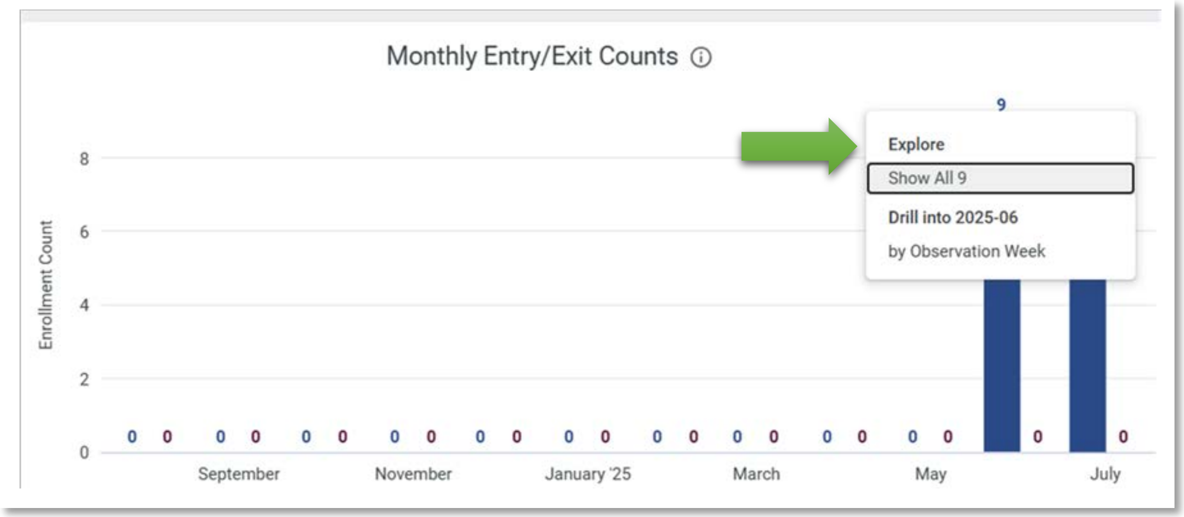
Section 1: Persons Served

Clicking on a number displays a drop-down menu (green arrow).

- Click on **Show All** to display a client list
- Click by **Observation Week** to view persons served over time

Note: After clicking on **Show All** or **by Observation week**, the **page may appear blank**. Scroll up to top of the page to display data

Inbound Recidivism-Returners section has the same features as the **Monthly Entry/Exit Counts**



By Observation Week
If you want to review client counts on a week by week basis: select a data range of several months or longer. The longer the date range, the more you will be able to review seasonal variations in persons served

Section 2: Length of Time (LoT) in Program

This section details average length of time (LoT) clients were in enrolled.

Click the number under **Client Count** (green arrow) to display a list of clients

Stayers/Leavers	Average	Median	Min	Max	Long Term Stayers (365+ Days)	Client Count	Household Count	Enrollment Count
Stayers	55.9	40	24	394	1	12	7	17
Totals	55.9	40	24	394	1	12	7	17

Click number under **Household Count** (blue arrow) or the number under **Enrollment Count** to display data.

The **<u>page may appear blank</u>** after clicking on **Client Count**, **Household Count**, or **Enrollment Count**. Scroll up to the top of the page to display data.

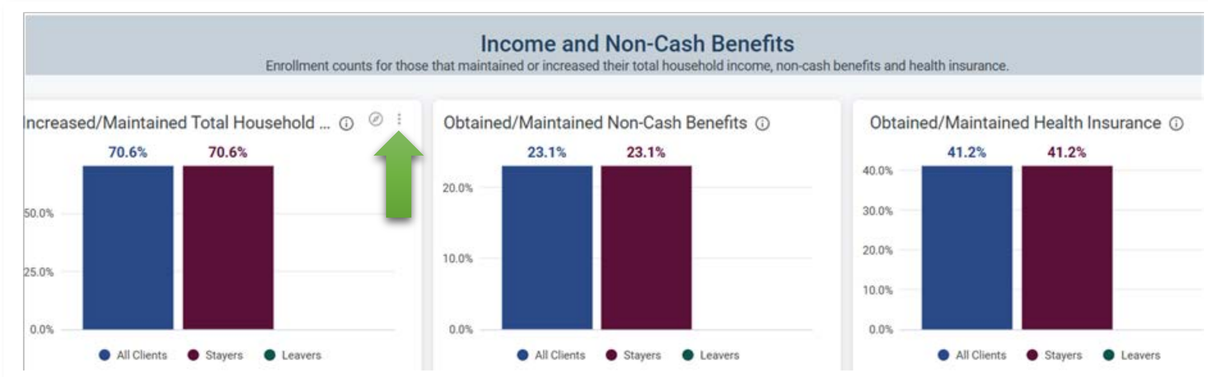
There are 2 other boxes in the **Length of Time in Program** section:

1. **LoT Comparisons-Project Type**
2. **LoT Leavers by Destination Category**

Section 3: Income & Non-Cash Benefits

Position your cursor in a box to reveal the **3 dots** (green arrow)

- Click **3 dots** to display down-down menu (**Explore from here**, Download data, **Clear cache & refresh**)

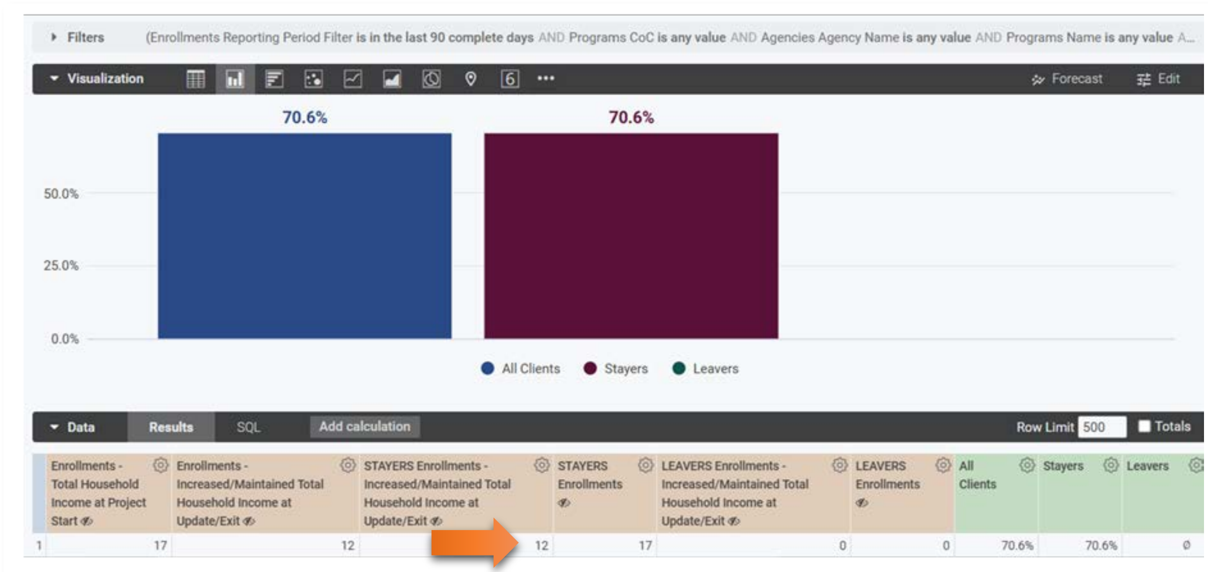


Click **Explore from Here** to display data fields and client counts. Click on a number to display a client list.

Example: Click number (orange arrow) to display the list of clients whose income **Increased/Maintained Total Household Income at Update/Exit**

The **page may appear blank** after clicking on a number. Scroll up to top of page to display data.

Click **X** to return to dashboard.



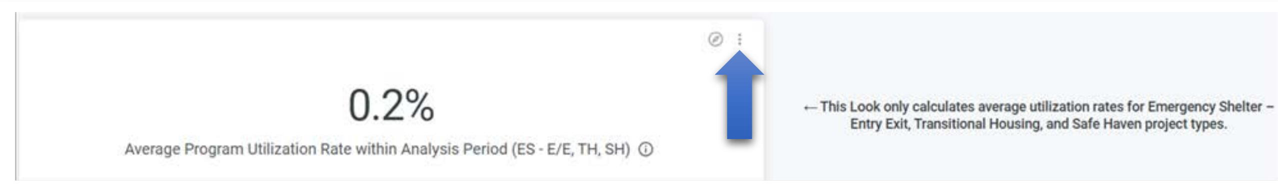
Section 4: Average Utilization

Average Utilization details the average rate of utilization for clients in Emergency Shelters, Transitional Housing, Permanent Housing, and Rapid Rehousing for the reporting period.

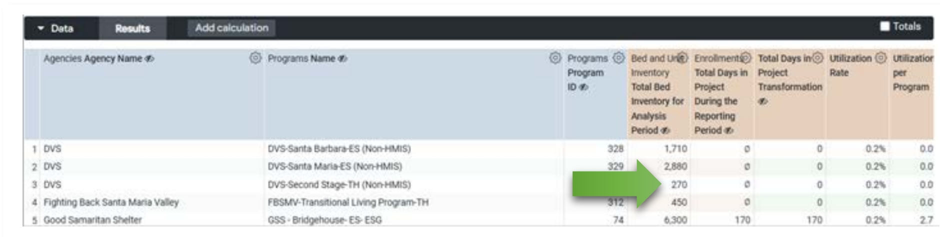
There are 3 subsections. Each subsection details a different project type:

1. **Emergency Shelters Entry/Exit** & **Transitional Housing** (see screenshot below)
2. **Emergency Shelters Night by Night**
3. **Permanent Housing** & **Rapid Rehousing**

Click 3 dots (blue arrow) to access drill down menu:



- Click **Explore from here** to display data listing agencies **Emergency Shelter** and **Transitional Housing** programs



	Agencies Agency Name	Programs Name	Programs Program ID	Bed and Unit Inventory Total Bed Inventory for Analysis Period	Enrollments Total Days in Project During the Reporting Period	Total Days in Project Transformation	Utilization Rate	Utilization per Program
1	DVS	DVS-Santa Barbara-ES (Non-HMIS)	328	1,710	Ø	0	0.2%	0.0
2	DVS	DVS-Santa Maria-ES (Non-HMIS)	329	2,880	Ø	0	0.2%	0.0
3	DVS	DVS-Second Stage-TH (Non-HMIS)		270	Ø	0	0.2%	0.0
4	Fighting Back Santa Maria Valley	FBSMV-Transitional Living Program-TH	312	450	Ø	0	0.2%	0.0
5	Good Samaritan Shelter	GSS - Bridgehouse- ES- ESG	74	6,300	170	170	0.2%	2.7

Want to see a list of clients for a program?

- Locate the Agency/Program, then
- Click the number in the **Total Days in Project During the Report period** column (green arrow) to review the list of clients enrolled during the reporting period
- After clicking the number: the <u>**page may appear blank**</u>. Scroll up to display data
- Click **X** to return to the dashboard

The format described above for **Emergency Shelters & Transitional Housing** is the same for Emergency Shelter Night by Night, and for **Permanent Housing & Rapid Rehousing**.

Section 5: Housing Move-in Date Review

Housing Move-in Date Review details clients who were enrolled in a Permanent Housing or Rapid Re-Rehousing program with a move-in date within the reporting period.

Click **3 dots** (green arrow), then click **Explore from here** to access client data:

Click number under **Enrollment Count** (blue arrow) to list clients enrolled in the program during the reporting period

Click number under **Enrollment w/ Housing Move in Date** (orange arrow) to list client with a housing move in date during the reporting period

Click **X** to return to the dashboard

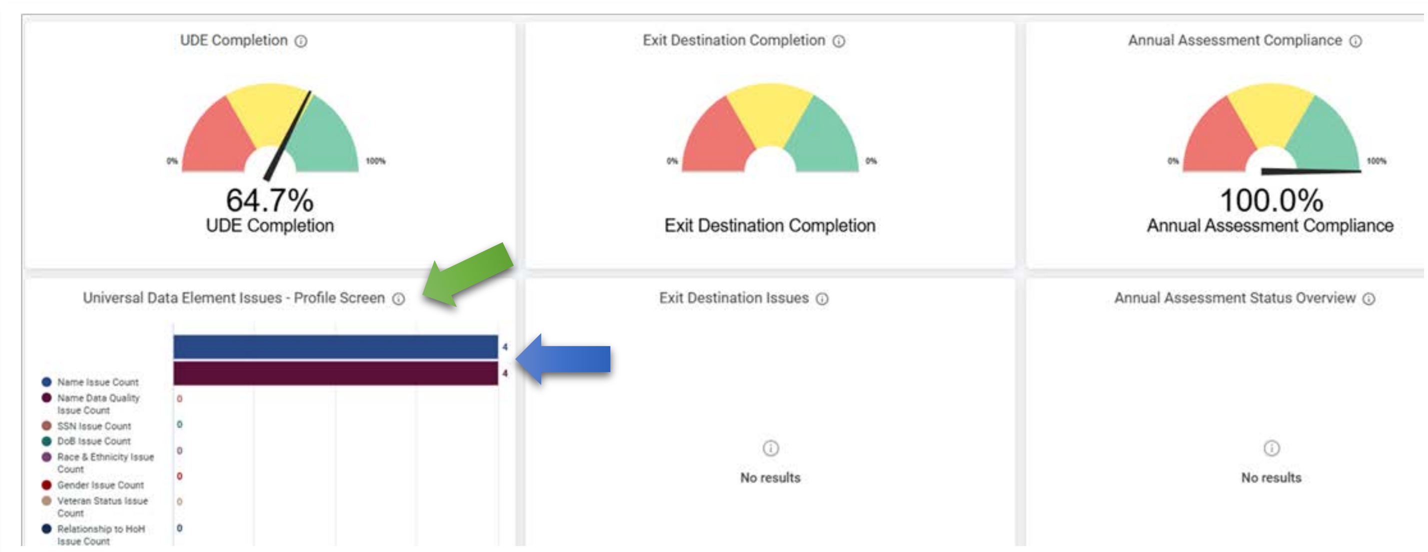
Section 6: Data Quality

Data Quality details clients enrolled within the reporting period **without** any **Universal Data Element** errors.

Details of potential data quality issues are listed below each graphic.

Potential issues for **UDE Completion** on the client's **Profile** are listed (green arrow) In this example, the issues are **Name Issue** & **Name Data Quality**

Click on a number (blue arrow) to reveal client list. To access the client's profile, click **Client ID**.



HUD considers **Client doesn't know**, **Client prefers not to answer**, and **Data not collected** as potential errors. HUD also prefers that client give their full name and Social Security Numbers (SSN).

Are these always errors?

No:

- If client doesn't know, then **Client doesn't know** is the correct entry.
- If client prefers not to answer, then **Client prefers not to answer** is the correct entry.
- If the client does not want to give their full name, then you can enter in a partial, street, or fake name.
- If a client does not want to give their full SSN, they can provide a partial SSN (the last 4 digits), or they can decline to give the SSN.

If the potential data quality error is any of the above, use your best judgement to determine if answer is correct or if it needs to be changed.

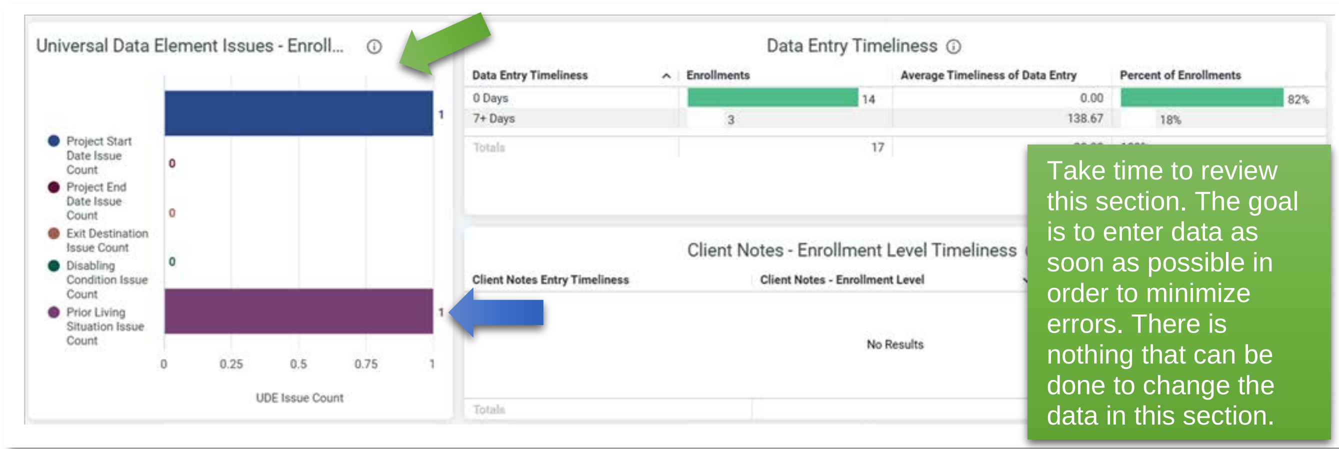
Data not collected: This means the client was not asked the question. Select this answer as little as possible. However, sometimes this is the only answer. Example: A client disappears. You exit them from your program. Since they disappeared you do not know their destination, so **Data not collected**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

Section 6: Data Quality

The second half of this section details the following:

Potential data quality issues in the client's Enrollment (green arrow)

In this example, there are 2 issues, including an issue with **Prior Living Situation**. Click on the number (blue arrow)



Page may appear blank. Scroll to top of page to reveal data

- Click on the Enrollment ID (orange arrow), then click **Clarity Program Enrollment** to access the enrollment

- Page refreshes to show History screen. Click **Enrollment** to access their enrollment
- Review the **Prior Living Situation** data fields. If necessary, update this section to resolve the issue. Scroll down and click **Save & Close** when done