End of Year Reporting DQ Plan:

What to Expect during the FY22 Data Clean Up Process

NC COALITION to end HOMELESSNESS

Presentation Agenda

- FY2022 Timeline
  - *10/1 – 10/19: Client Level Clean Up*
  - ***10/20: Report Submissions Due***
  - *10/24 – 11/18: System Level Clean Up*
  - *11/21 – TBD: HUD feedback Level Clean Up*

- Required Participants
  - Street outreach (SO)
  - Emergency Shelter (ES)
  - Transitional Housing (TH)
  - Rapid Rehousing (RRH)
  - Permanent Supportive Housing (PSH)
  - Other Permanent Housing (OPH, PH-S, PH-H)

- Client Data Clean Up by Project Process
  - Agency Admin, User, and NCCEH roles
  - BusinessObjects Reports to be used & submitted:
    - *D001 Street Outreach DOE*
    - *D002 Annual Review Audit*
    - *D003 LSA Client Data Clean Up*
  - Reporting Periods to be used (CoC dependent)
  - Reporting Submission Deadline: **October 20, 2022**

- Resources
  - Training opportunities
  - ZenGuides
  - Helpdesk support

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FY2022 Data Clean Up Timeline

OCTOBER 3 – OCTOBER 19

Agency Admins (AA): run BusinessObjects reports

HMIS users: fix report errors provided by AA

NCCEH: host trainings and assist users requesting help

Training opportunities: 10/4, 10/5, 10/10, 10/13, 10/19

OCTOBER 24 – NOVEMBER 18

Agency Admins (AA) & HMIS users: provide confirmations, clarifications, or additional data clean up as requested by NCCEH.

NCCEH: identify system-wide errors, reach out individual agencies for support on client corrections &/or clarifications for NCCEH to resolve issues.

Oct 3 - 7	Oct 10 - 14	Oct 17 - 19	Oct 24 - 28	Oct 31 – Nov 4	Nov 7 - 11	Nov 14 - 18	*Nov 21 – final submission*

Client Data Cleaned by individual projects

Project Details & System Errors Reviewed by NCCEH. Projects support NCCEH with any outstanding corrections.

Today: Info Session

October 20: project reports due!

Training Opportunity: 10/20

NOVEMBER 21 – HUD submission

AA, HMIS users, CoCs, and NCCEH: work collaboratively to resolve HUD identified issues.

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Am I required to participate?

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Project Types (required):

- Street outreach (SO)
- Emergency Shelter (ES)
- Transitional Housing (TH)
- Rapid Rehousing (RRH)
- Permanent Supportive Housing (PSH)
- Other Permanent Housing (OPH, PH-S, PH-H)

Projects Included in the Process:

1. Is your project one of the required types? *If yes, continue on…*
2. Is your ES, TH, RRH, PSH, or other PH included on the Housing Inventory Chart – or will be this year? *If yes, continue on…*
3. Was your Orange County CoC project operational at all during after October 2020? Was your Balance of State or Durham CoC project operational at all after October 2021? *If yes, continue on…*

If yes to all three of the above items,

YOUR PROJECT IS INCLUDED!

Even if your project does not receive federal funding, it still is required to participate in this clean up process.

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Client Data Clean Up!

October 3 – October 19

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ROLES

Agency Admin

- Run BusinessObjects Reports
- Share BusinessObjects Reports with users
- Submit error-free reports by deadline

HMIS Users

- Correct client errors on each of the BusinessObjects Reports
- Reach out to Helpdesk if there are errors for which support is needed.
- Provide explanations to Agency Admin for any errors that cannot be resolved with Helpdesk support

Optional but encouraged: participate in training opportunities

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Reporting Details: Reports to Run

BusinessObjects Reports

1. D001 Street Outreach DOE
   - Required for Only for Street Outreach projects
   - Must be corrected & error free before running additional reports

2. D002 LSA Annual Review Audit
   - Required for all projects (SO, ES, TH, RRH, PSH, and other PH)

3. D003 LSA Client Data Clean Up
   - Required for all projects (SO, ES, TH, RRH, PSH, and other PH)

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Reporting Details: Reporting Period

Balance of State CoC: *reporting for FY2022*

Durham County CoC: *reporting for FY2022*

Orange County CoC: *reporting for FY2021 and FY2022*

*Orange County CoC projects will be responsible for pulling and correcting multiple reports (staring with FY2021)!

FY2021 = 10/1/2020 – 9/30/2021

FY2022 = 10/1/2021 – 9/30/2022

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So…

- A street outreach project for BoS or Durham will end up submitting three total reports
  - A street outreach project for Orange will end up submitting six total reports
- A residential project for BoS or Durham will end up submitting two total reports
  - A residential project for Orange will end up submitting four total reports

Project Type	BoS CoC FY2021	BoS CoC FY2022	Durham CoC FY2021	Durham CoC FY2022	Orange CoC FY2021	Orange CoC FY2022
Street Outreach	-	*D001 Street Outreach DOE* *D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	-	*D001 Street Outreach DOE* *D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D001 Street Outreach DOE* *D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D001 Street Outreach DOE* *D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*
Emergency Shelter	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*
Transitional	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*
Rapid Rehousing	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*
Permanent Supportive Housing	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*
Permanent Housing – other types	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	-	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*	*D002 LSA Annual Review Audit* *D003 LSA Client Data Clean Up*

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Reporting Details: Recap

1. Each report will be run per HMIS Project, per reporting period.
   - Orange County CoC must correct FY2021 reports and confirm they're error-free before working on FY2022 reports.
   - Street Outreach projects must correct D001 and confirm accurate before working on D002 and D003 reports.
2. BusinessObjects Reports require an overnight refresh before data changes "appear" on the report. Get started sooner rather than later!
   - Final corrections in HMIS must be made by October 19th

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Reporting Details: Submission

All reports due for a project are required to be submitted at one time by

Thursday, October 20

Submissions will be sent electronically via a submission link.

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Resources

- ❑ Training opportunities
- ❑ ZenGuides
- ❑ Helpdesk support

Training Opportunities:

1. Tuesday, October 4, 1pm-2pm: *Annual Review Audit & Street Outreach DOE*
2. Wednesday, October 5, 9:30am-10:30am: *LSA Client Clean Up Report*
3. Monday, October 10, 2pm-3:30pm: *LSA Client Clean Up Report*
4. Thursday, October 13, 9am-10am: *Submission How-To & QA time*
5. Wednesday, October 19, 10am-11am: *Submission How-To & QA time*
6. Thursday, October 20, 1pm-2pm: *Reporting Season: what to expect next*

ZenGuides:

Guides specific for this clean up process:

- ✓ LSA/SPM Federal Reporting Data Preparation Guide
- ✓ D001 Street Outreach DOE Report
- ✓ D002 LSA Annual Review Audit Report
- ✓ D003 LSA Client Data Clean Up Report

Guides to learn how to use BusinessObjects:

- ✓ Using BusinessObjects 101
- ✓ How to Schedule BusinessObjects Reports

Helpdesk: hmis@ncceh.org

Reach out sooner rather than later for support. We are here to support the valuable work you do!

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Next Steps: What now????????

AGENCY TASKS:

1. Contact the Helpdesk if your agency does NOT have an Agency Admin identified already.
2. If your project has clients enrolled in the wrong project (or there have been clients not yet entered but were served), enroll them into the correct project before running reports.

NCCEH TASKS:

1. An email will go out to all Agency Admin this afternoon with this process outlined, as well as links to resources.
2. Post this info session on the NCCEH website

Begin running reports!

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Have a Question About a Report?

Check out ZenGuide

https://ncceh.zendesk.com/hc/en-us

If you still have questions, contact the HMIS@NCCEH Data Center at: **hmis@ncceh.org**

To ensure we can offer the best possible support, we recommend the following:

- Schedule the report, using the Microsoft Excel file format.
- Include the report's name and prompt values in your email.
- Share any client ID numbers of interest.

If you choose to attach a copy of the report or include any screenshots, please remove any Personally Identifiable Information (PII) like client names or Social Security Numbers first!

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