Implementing the Built for Zero Report Suite Available in WellSky Community Services

Learning Session 2024 - Breakout
11.13.2024

COMMUNITY SOLUTIONS

BFZ WellSky Report Breakout - Welcome!

⭐⭐⭐ **Please verify or add your email to the sheet we have up front** ⭐⭐⭐

Did you….
- ❏ Watch the prep video we sent?
- ❏ Generate a ***de-identified*** Case Conferencing and Newly Housing Inactive Clients Exiting (NHICE) report and download it to Excel?
- ❏ Bring your laptop to work from?

> **Wi-Fi**
> Network: **Hyatt Meeting Space**
> Password: **BFZLS2024**

If yes!
- ➔ Find a spot where you can plug your laptop in (if needed) and open up your reports.
- ➔ Let us know if you have a confidentiality form you'd like us to sign (not mandatory)

If no!
- ➔ Come chat with us before we get started to make a plan

Agenda

➜   Welcome

➜   Level-set

➜   Introducing Hugo

➜   Workshop and testing

➜   Setting a data quality plan
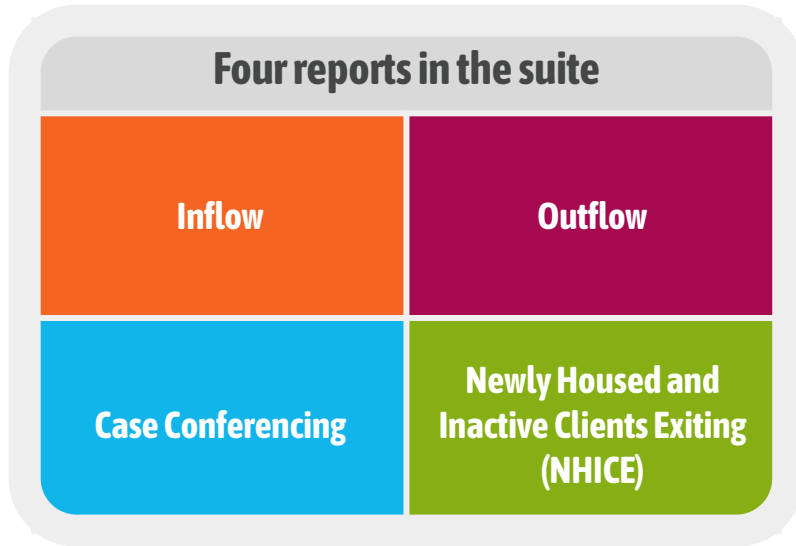
➜   Share out

➜   Next steps

Objectives

➔ **Become familiar** with how Hugo can be used for data quality monitoring

➔ **Provide insight to BFZ** on how we can adjust Hugo to best meet community needs

➔ **Create a plan** for integrating BNL data quality monitoring into your day to day work

Quick Poll

➔ **Are you using Excel for Microsoft 365 or an earlier version of Excel?**

Raise your hand if you are NOT using Excel for Microsoft 365 or if you aren't sure

Purpose and use of the report suite

Four reports in the suite

Inflow	Outflow
Case Conferencing	Newly Housed and Inactive Clients Exiting (NHICE)

✅ **2024 HMIS Data Standards**

HMIS as By Name Data Set
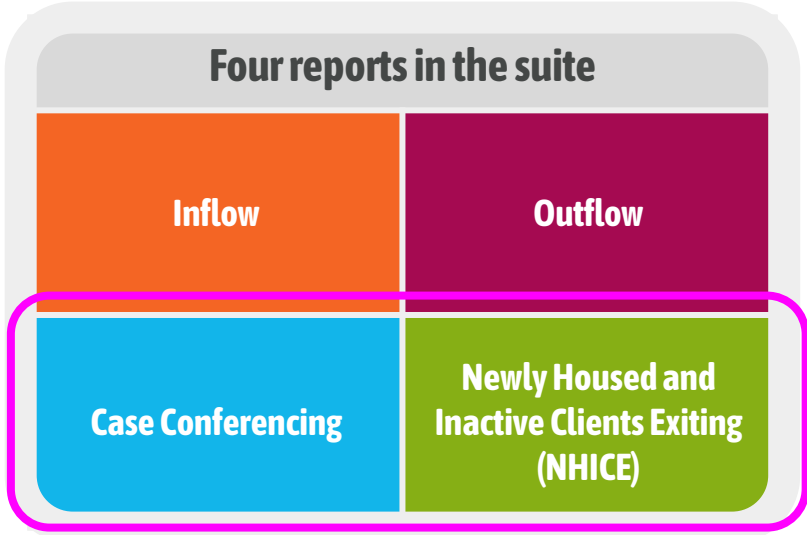
- Case conferencing list/ BNL/Active List
- BFZ Monthly Metrics
- Historical view of system
- Disaggregate to look for disparities over time
- BNL Data quality tool

Purpose and use of the report suite

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✅ **2024 HMIS Data Standards**

HMIS as By Name Data Set

- Case conferencing list/ BNL/Active List
- BFZ Monthly Metrics
- Historical view of system
- Disaggregate to look for disparities over time
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Quality Data Framework

VALID

Ability to answer 'yes' to all scorecard questions

+

RELIABLE

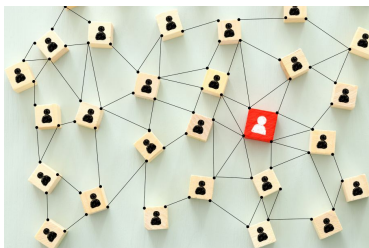Ability to produce balanced monthly metrics

=

QUALITY

Data that can be used for effective system planning

Why does Quality Data matter?

Who's missing?

You can't help someone exit out of homelessness if you don't know who is experiencing it.

Quality Data ensures that a system is able to connect with everyone experiencing homelessness, regardless of their engagement status.

What do we need to solve homelessness?

A full accounting of people in need helps build a clearer picture of what resources your community needs.
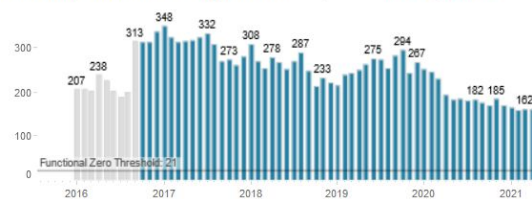

Quality Data allows communities to have a better understanding of how the system is functioning to meet the needs of the people they serve.

How do we know we're making a difference?

Without a robust measurement framework, it's hard to know whether improvement projects are having a population level impact.

Quality Data allows communities to implement small tests of change and measure progress.

Implementation process

1 **Report set up**

- ◆ **Report access:** Building relationships with HMIS administrators to view system-wide data
- ◆ **Mapping the reports:** Connecting the templates to the local HMIS system
- ◆ **Customizing the report logic:**
  - ● Verify mechanics of report matches existing data practices and policies (moving someone to inactive, housed, returns).
- ◆ **OPTIONAL - Customizing the report output**
  - ● Adding additional data elements (assessment scores, income, sub-regional CE location)

2 **Report generating and validating**

- ◆ **Reporting group set up:** Fine tuning the project data pulled into the report to capture **system wide data**
- ◆ **Validating the reports:** Use existing lists to determine who is missing

3 **Using the reports monthly**

- ◆ Using the reports to **monitor data quality**
- ◆ Using the reports to **build a BNL or Case Conferencing list**
- ◆ Using the reports to **report BFZ population and subpopulation data**

Today's focus

Looking for support on other parts of the process?

**Attend the Data Office Hours
Thursday 3:45-5:45p in Lakeshore B**

3 **Using the reports monthly**

◆ Using the reports to **monitor data quality** ✅

Planning for success

✔ **By the 3th** → Run the report

✔ **By the 7th** → Use Hugo

✔ **By the 12th** → Fix the data in HMIS

✔ **By the 13th** → Rerun the report

✔ **By the 15th** → Report monthly data and save the report

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Is by-name data quality monitoring a regular part of your team's workflow?

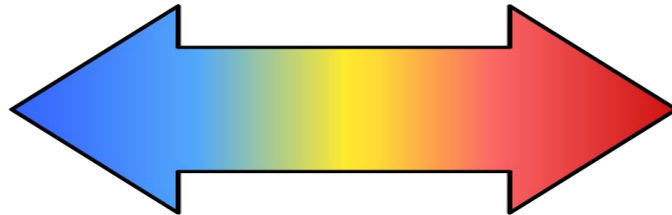No   Yes

Planning for success

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Does your team have time to monitor your by-name data?

No

Yes

Data Quality Tool - Hugo (Beta version)

What Hugo has to offer:

- ◆ **Error identification and monitoring**
  - Ex: *Who is housed, but still has an open enrollment?*
- ◆ **Identification of data clean up opportunities**
  - Ex: *Who has an open housing enrollment, but was never housed?*
- ◆ **Coordinated Entry enrollment information**
  - Ex: *Who is not enrolled in CE, but is enrolled in other projects?*
- ◆ **List status monitoring**
  - Ex: *Who should be moved to inactive, but still has an open enrollment*

What we are asking of you:

- ◆ Help us find the glitches
- ◆ Let us know what you like about Hugo
- ◆ Let us know how Hugo could be improved

Hugo Demo - Excel

Client is enrolled in CE Only

The individuals on this list are open in Coordinated Entry, but do not have any other open program enrollments.

Add a filter to the header row to narrow by BFZ Household Type and/or subpopulation status.

Client UIDs in red text indicate duplicates.

HOW TO ADDRESS THESE CASES IN DATA CLEAN UP:
- Depending on local protocols, these individuals may need to have an enrollment opened in another project.
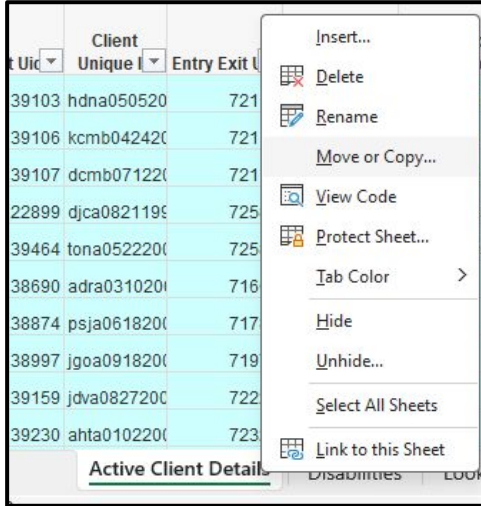- Use the notes section below to track your data clean-up.

Case Conferencing report	
Sheet Name	Active Client Details
Client Uid Column	A
Highlight Status	BQ
Last Column	BU
Last Row (autopopulated)	1859
First Row	5

Notes	Client Uid	First Name	Last Name	Chronic	Veteran	BFZ Household Type	Provider
	130	Hidden	Hidden	Non-Chronic	No (HUD)	Other Household Type	Danville Coordinated Assessment(103)
	460	Hidden	Hidden	Non-Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	746	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	823	Hidden	Hidden	Non-Chronic	No (HUD)	Other Household Type	Danville Coordinated Assessment(103)
	928	Hidden	Hidden	Non-Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	1255	Hidden	Hidden	Non-Chronic	No (HUD)	Unaccompanied Youth	Danville Coordinated Assessment(103)
	1428	Hidden	Hidden	Non-Chronic	Yes (HUD)	Families	Danville Coordinated Assessment(103)
	1428	Hidden	Hidden	Non-Chronic	Yes (HUD)	Families	Danville Coordinated Assessment(103)
	1526	Hidden	Hidden	Non-Chronic	No (HUD)	Other Household Type	Danville Coordinated Assessment(103)
	1694	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	1694	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	2333	Hidden	Hidden	Chronic	No (HUD)	Families	Danville Coordinated Assessment(103)
	2333	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	3132	Hidden	Hidden	Non-Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	3274	Hidden	Hidden	Chronic	No (HUD)	Families	Danville Coordinated Assessment(103)
	3480	Hidden	Hidden	Non-Chronic	0	No HoH or DOB Missing	Danville Coordinated Assessment(103)
	3480	Hidden	Hidden	Non-Chronic	0	Families	Danville Coordinated Assessment(103)
	3524	Hidden	Hidden	Non-Chronic	No (HUD)	Other Household Type	Danville Coordinated Assessment(103)
	3534	Hidden	Hidden	Non-Chronic	No (HUD)	Families	Danville Coordinated Assessment(103)
	3856	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	4084	Hidden	Hidden	Non-Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	4091	Hidden	Hidden	Chronic	No (HUD)	Families	Danville Coordinated Assessment(103)
	4437	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	4645	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	4778	Hidden	Hidden	Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	4918	Hidden	Hidden	Non-Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)
	4938	Hidden	Hidden	Non-Chronic	No (HUD)	Single Adults	Danville Coordinated Assessment(103)

Hugo Demo - Excel

◆ First open your two downloaded reports and Hugo

Hugo Demo - Excel

◆ From the Case Conferencing Report, copy the **Active Client Details** tab into Hugo.

◆ From the NHICE Report, copy the **Open Enrollment Details** and **New Exit Details** tabs into Hugo.

Right-click the tab on your downloaded report
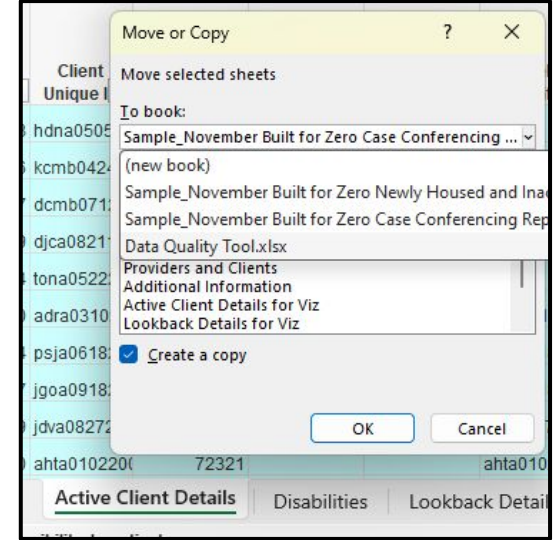
Check "Create a copy"

Select the Tool under the "To book:" menu

Hugo Demo - Excel

◆ The sheets will automatically populate using a formula and the tables at the top of the sheet.

D	E	
Case Conferencing report		
Sheet Name	Active Client Details	
Client Uid Column	A	
Highlight Status	BQ	
Last Column	BU	
Last Row (autopopulated)	1859	
First Row	5	

=CHOOSECOLS(VSTACK(INDIRECT(""&E2&"!"&E3&E7&":"&E5&E7),SORT(FILTER(INDIRECT(""&E2&"!"&E3&E7&":"&E5&E6),(INDIRECT(""&E2&"!"&E4&E7&":"&E4&E6)="Housed Destination")+(INDIRECT(""&E2&"!"&E4&E7&":"&E4&E6)="Moved In")))),1, 9,10, 46, 29, 23, 38, 44, 45)

Hugo Demo - Excel

◆ The first 3 tabs pull critical data quality information from the Case Conferencing Report **Active Client Details** tab

Shows a list of individuals who are **open in Coordinated Entry**, but do not have any other program enrollments.

Shows a list of individuals who are **enrolled in a program**, but do not have an open CE Enrollment.

Shows a list of individuals who are **open in a Permanent Housing program**, but do not have a Housing Move-in Date recorded.

CC - CE Only   CC - No CE Enrollment   CC - PH Enrollment
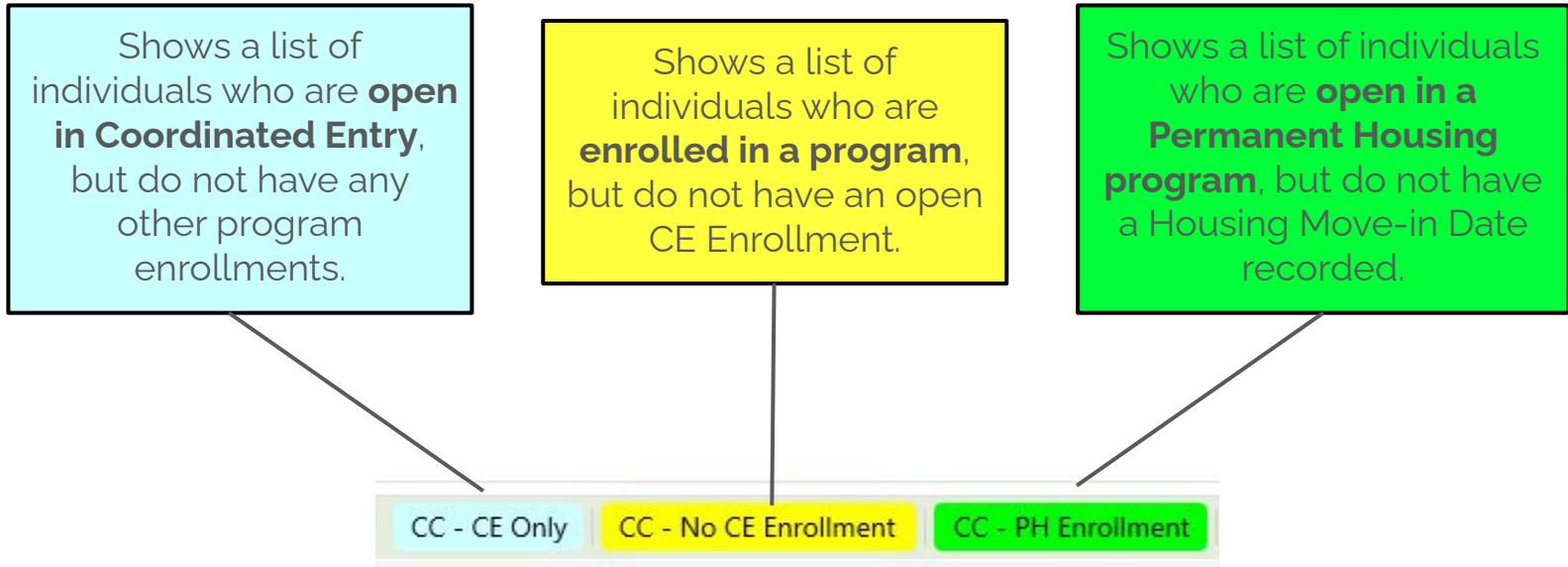
Hugo Demo - Excel

◆ The next group of 4 tabs pull critical data quality information from the NHICE Report **Open Enrollment Details** tab

The people on this list **may have been successfully housed** during the reporting month, but they still have an open enrollment, which will keep them on the Active list.

The people on this list **may have become inactive recently** but they still have an open enrollment, which will keep them on the Active list.

The people on this list **may have recently entered an institution or passed away** while experiencing homelessness. If they show up on this list, it means that they also still have an open enrollment, which will keep them on the Active list.

The people on this list **may have remained in an open enrollment after their Head of Household exited** (i.e. the parent was exited, but the children remain enrolled).

37/08 Hidden   Hidden   Non (

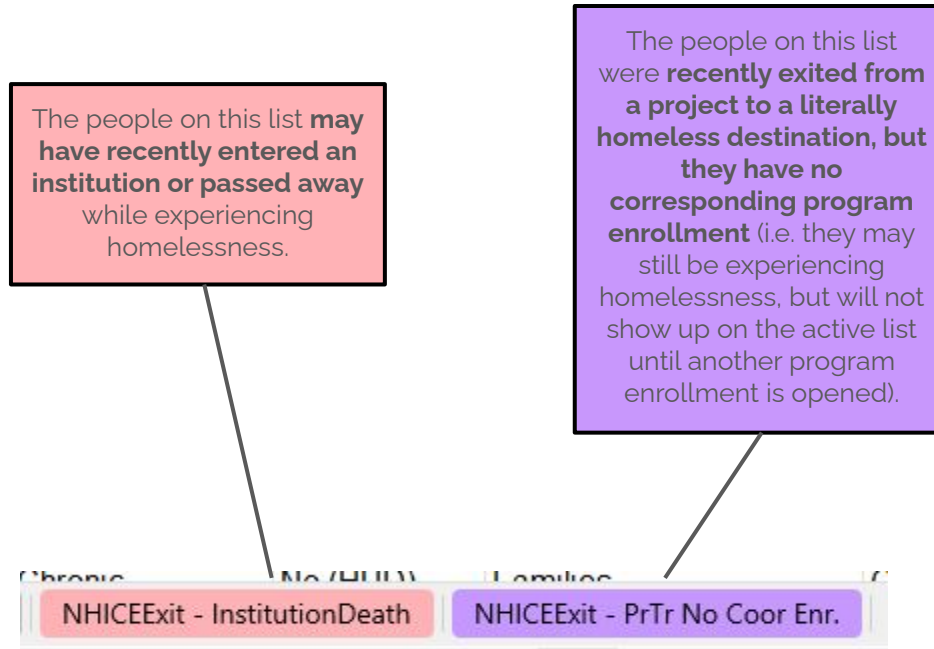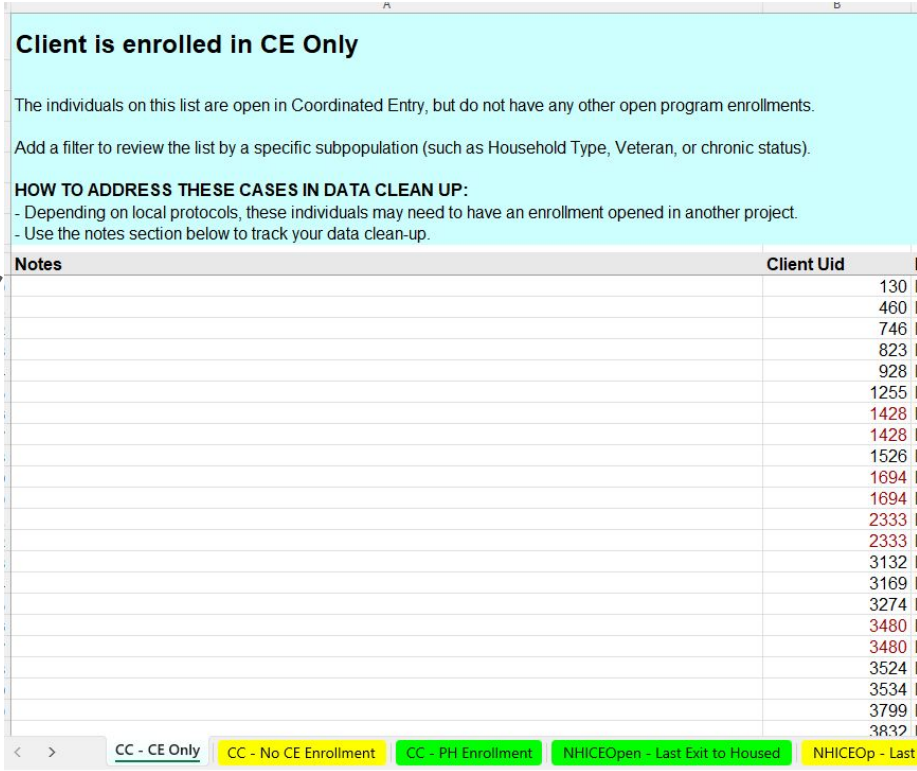NHICEOpen - Last Exit to Housed   NHICEOp - Last Exit to Inactive   NHICEOpen - Last Exit InstDeath   NHICEOpen - No HoH DOB Missing

Hugo Demo - Excel

◆ The last 2 tabs pull critical data quality information from from the NHICE Report **New Exit Details** tab

The people on this list **may have recently entered an institution or passed away** while experiencing homelessness.

The people on this list were **recently exited from a project to a literally homeless destination, but they have no corresponding program enrollment** (i.e. they may still be experiencing homelessness, but will not show up on the active list until another program enrollment is opened).

Chronic   No (HUD)   Families

NHICEExit - InstitutionDeath   NHICEExit - PrTr No Coor Enr.

Hugo Demo - Excel

◆ Each tab Hugo has a place for you to take notes to keep track of your data clean-up progress as you move through the list of potential errors.

Your turn to try it out!

1. **Download** the Hugo Excel workbook attachment on the email we just sent (Let's chat about when to use Google Sheets instead)
2. **Open** your CC and NHICE report (or the sample dataset)
3. **Copy** the Active Client Details, New Exit Details, and Open Enrollment Details tabs to Hugo
4. **Review** all the tabs to see what data populated
5. **Let us know if you encounter any issues or errors**

If you see a #CALC error it means there is no data to populate that list

➔ **What surprising information sticks out when you are looking at your data?**

➔ **Which columns would be helpful to add?**

   ◆ *Look at the column placement sheets at your table and let us know what would be helpful or add or see instead!*

➔ **What is not clear yet?**

A peek behind the curtain

- **=CHOOSECOLS → Selects the columns to display**

- =VSTACK → Adds the headers to the first row of the new table

- =FILTER → Filters on specific criteria

- =SORT → Sorts by Client Uid

- =INDIRECT → references the table at the top of the sheet to build the formulas

=**CHOOSECOLS**(VSTACK(INDIRECT(""""&E2&"""!"&E3&E7&":"&E5&E7),
SORT(FILTER(INDIRECT(""""&E2&"""!"&E3&E7&":"&E5&E6),(INDIRECT(
""""&E2&"""!"&E4&E7&":"&E4&E6)="Housed
Destination")+(INDIRECT(""""&E2&"""!"&E4&E7&":"&E4&E6)="Moved
In")))),**1, 9,10, 46, 29, 23, 38, 44, 45**)

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Various approaches to monitoring data quality

Hugo:
- ◆ Out of the box Excel tool that produces easy to review lists that support data quality monitoring and data clean up

Pros	Cons
Out of the box automated tool	Only shows select fields
Easy to use	Formulas can easily break
Built in logging system	May not meet your local needs for data review

Alternative approach:
- ◆ Basic Excel functionality
  - ◆ Filters
  - ◆ Conditional formatting
  - ◆ Hide columns

Pros	Cons
Flexible to meet your needs - Filter on any field - Show/Hide any fields	Potential steep learning curve
	Easy to get lost in the data
No formulas to worry about	No built in way to track progress

Share out

What's on your mind?

➜ What surprising information stuck out to you while looking at your data?

➜ Which additional columns would be helpful to see?

➜ How might you implement Hugo?

➜ What is helpful about Hugo?

➜ What still feels unclear?

Planning for success

→ **Using the reports to monitor data quality**

✔ **By the 3th** → Run the report

✔ **By the 7th** → Use Hugo

✔ **By the 12th** → Fix the data in HMIS

✔ **By the 13th** → Rerun the report

✔ **By the 15th** → Report monthly data and save the report

What's the plan??

Planning for success

→ **Using the reports to monitor data quality**

✔ **By the ___** → Run the report

- How long do folks have to enter data into HMIS?

✔ **By the ___** → Use Hugo to identify errors and log progress

- Which parts of Hugo will you plan to use?

✔ **By the ___** → Fix the data in HMIS

- Who is responsible for fixing the data?

✔ **By the ___** → Rerun the report

- How long do you need to give folks to fix the data before re-running the reports?

✔ **By the ___** → Report monthly data and save the report

- What is your process for saving and organizing the final report outputs?

Next Steps

➔ BFZ will work on next version of Hugo to share out with the wider network
➔ Use the feedback form to ask questions about Hugo or anything else related to the reports

At the learning session:
➔ Come to the data lead networking
  ◆ Thursday 10:45-11:45a
  ◆ Lakeshore C (here)
➔ Visit LS Data office hours
  ◆ Thursday 3:45-5:45p
  ◆ Lakeshore B

For the future:
➔ Report support
  ◆ More office hours *(Open to all)*
  ◆ Monthly affinity group to meet with peers and discuss the report *(Invite only)*
  ◆ Other?

★ **As you leave, please let us know what would best support you on a sticky!**

Use this QR code to find the full Learning Session agenda!