



THE CoC APR-PART 2

THIS INCLUDES HOW TO IDENTIFY AND CORRECT APR ERRORS

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PURPOSE

The purpose of this workflow document is to identify Data Quality Error's within the **CoC Annual Performance Review (APR)** in ServicePoint (HMIS) and where to go to make the corrections. This workflow aligns with HUD Specifications and Mediware System's guidance. The **CoC APR** is a Data Quality Report that is used for any project that is using the Project Entry Exits (Project Entry, Interim Review and Project Exit).

Almost all of the data quality error's in the **CoC APR** are the result of missing OR incorrect information in the Project Entry or Exit. The **CoC APR** pulls all of the combined project data from the Entry Exits even if the client (including households) has been exited already. In some cases an agency may have several projects that can be included in one CoC APR. While this may seem easier, it may make more sense to create a CoC APR one project at a time. These options may also be restricted depending on the type of funding sources.

GLOSSARY

This glossary includes a list of terms that will be referred to in this document.

HUD	Acronym used to refer to the Department of Housing and Urban Development
HSN.....	Acronym for Homeless Services Network
HMIS.....	Acronym for Homeless Management Information System
CoC	Acronym for Continuum of Care
Agency Administrator (AA)	A person designated by a CoC Member Agency Executive Director/Chief Executive Officer who acts as a liaison and contact person to the HMIS staff
HMIS End User	Any system user who has an active ServicePoint license. This can include Agency Administrators

LOCATION OF THE CoC APR

The “canned/static” CoC APR can be found by the HMIS End User on the HMIS/Service Point Dashboard under the reports tab on the left side of the dashboard (See Snapshot below). Note that you can click on the *word* CoC APR (number 2) OR on the large CoC APR *icon* (number 3). Either one will open the CoC APR.

The screenshot displays the 'Reports > Report Dashboard' interface. On the left, a navigation sidebar includes 'Last Viewed' and 'Favorites' tabs, and a list of menu items: Home, ClientPoint, ResourcePoint, FundManager, ShelterPoint, and Reports (1). Under 'Reports', sub-items include Audit Report, User Information, User Login, AHAR, Call Record Report, Client Served Report, CoC-APR (2), Daily Unit Report, Entry/Exit Report, ESG CAPER (HDS V5), Fund Availability Report, Needs Report, PATH 2017, and PATH 2016. The main dashboard area is titled 'Report Dashboard' and features a search bar. It is divided into two sections: 'Audit Reports' and 'Provider Reports'. The 'Audit Reports' section contains three tiles: 'Audit Report', 'User Information', and 'User Login'. The 'Provider Reports' section contains four tiles: 'Annual Homeless Assessment Report (AHAR)', 'Call Record Report', 'Client Served Report', and 'CoC-APR'. The 'CoC-APR' tile in the Provider Reports section is highlighted with a red box and labeled with a red circle containing the number 3. The 'CoC-APR' text in the sidebar is labeled with a red circle containing the number 2.

Figure 1

CREATING THE CoC APR

To enter the required report options, please refer to Steps and snapshots below:

- » Step 1 – Ensure that your **Enter Data As (EDA)** is selected (example below: CES 811 RRH)
- » Step 2 – Go to Reports tab on left side your dashboard and open the CoC APR (Fig 1 page 4)
- » Step 3 – Complete information under ‘Report Options’ (see snapshot below for guidance)

Report Options

1 **Provider** Reporting Group

Provider* CES - Rapid Re-Housing (RRH) Match (811) 2 Search My Provider Clear

4 This provider AND its subordinates This provider ONLY 3

Program Date Range* 10 / 01 / 2017 to 02 / 21 / 2018

Entry/Exit Types* Basic HUD PATH Quick Call RHY Standard VA HPRP (Retired)

Build Report Download Clear

Figure 2

- » There are numerous sections included in the CoC APR. The Program manager and/or the Agency Admin should understand what the sections are and what impact this data has the specific project that it represents. You should also note that sections **6a – 6f have columns that include “% of Error Rate”**. The HSN CoC benchmark is not to exceed 5%.
- » These error rates need to be monitored by the HMIS Agency Admin AND managed accordingly. The “Error Count” number can be clicked on so as to see which clients represent these error counts. The CoC APR Part 2 will provide instructions on how to identify the error and correct it.

CoC-APR Report Results	
4a - Project Identifiers in HMIS	
Organization Name	Coordinated Entry System
Organization ID	768
Project Name	CES - Rapid Re-Housing Match
Project ID	811
HMIS Project Type	Coordinated Assessment (HUD)
Method of Tracking ES	
If HMIS Project ID = 6 (S Only)	
Is the Services Only (HMIS Project Type 6) affiliated with a residential project?	
If 2.4, Dependent A = 1	
Identify the Project ID's of the housing projects this project is affiliated with	

Figure 3

SECTION 5A BELOW IS THE REPORT VALIDATION TABLE". (FIGURE 4)

5a - Report Validations Table	
Report Validations Table	
1. Total Number of Persons Served	984
2. Number of Adults (age 18 or over)	329
3. Number of Children (under age 18)	655
4. Number of Persons with Unknown Age	0
5. Number of Leavers	355
6. Number of Adult Leavers	116
7. Number of Adult and Head of Household Leavers	116
8. Number of Stayers	629
9. Number of Adult Stayers	213
10. Number of Veterans	7
11. Number of Chronically Homeless Persons	36
12. Number of Youth Under Age 25	56
13. Number of Parenting Youth Under Age 25 with Children	36
14. Number of Adult Heads of Household	273
15. Number of Child and Unknown-Age Heads of Household	1
16. Heads of Households and Adult Stayers in the Project 365 Days or More	47

Figure 4

- Section 6a below gives you an example of missing data and **% of Error Rate**. The missing information below are all located in the Client Demographics within the Client Profile page in Client Point. (See Figure 5)
- By clicking on the **blue numbers**, the Clients will appear (See below)

14. Number of Adult Heads of Household	273
15. Number of Child and Unknown-Age Heads of Household	1
16. Heads of Households and Adult Stayers in the Project 365 Days or More	47
6a - Data Quality: Personally Identifiable Information	
Data Element	
Name (3.1)	
SSN (3.2)	
Date of Birth (3.3)	
Race (3.4)	
Ethnicity (3.5)	
Gender (3.6)	
Overall Score	
6b - Data Quality: Universal Data Elements	
Data Element	
Veteran Status (3.7)	

6a - Data Quality: Personally Identifiable Information
Client Doesn't Know/Client Refused

ID	Client
192513	[REDACTED]
190213	[REDACTED]
190215	[REDACTED]
190214	[REDACTED]
162467	[REDACTED]
190217	[REDACTED]
190216	[REDACTED]

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Download Results Exit

Client Doesn't Know/Client Refused	Information Missing	Data Issues	% of Error Rate
0	0	0	0%
68	66	8	14%
0	2	0	0%
7	11		2%
0	7		1%
0	1		0%
			16%

Error Count	% of Error Rate
1	0%

Figure 5

NOTE THE ERRORS APPEARING IN SECTION 6A (FIGURE 5)

- » Go to the specific client Demographics under the Client Profile in Client Point and complete missing client information
- » The errors can be any combination that are listed below:
- » “CLIENT DOESN’T KNOW OR REFUSED” BELOW WITHIN THE CLIENT RECORD (EXCEPT ALIAS) WILL GENERATE AN ERROR ON THE APR. THESE ARE ALL HUD REQUIREMENTS

Client Information

Summary | **Client Profile** | Housi

Client Record

Name	ZZ-Doe, ZZ-John
Name Data Quality	Full Name Reported
Alias	
Social Security	
SSN Data Quality	Client refused (HUD)
U.S. Military Veteran?	No (HUD)
Age	59

1 CLIENT REFUSED OR DOESN'T KNOW

- » THE “INFORMATION MISSING” ERROR WILL SHOW FOR ANY MISSING DEMOGRAPHICS EXCEPT SECONDARY RACE WHICH IS OPTIONAL.....

Client Demographics

Editing the Client Demographic Information could affect t and the Client Search.

Client Demographics

2

Date of Birth (UDE)	10 / 01 / 1958
Date of Birth Type	Full DOB Reported (HUD)
Gender (UDE)	-Select-
Primary Race (UDE)	-Select-
Secondary Race (Optional)	-Select-

MISSING DATA

ERRORS APPEARING IN SECTION 6A (FIGURE 5)

» You must use the client's Full SSN – NO partial numbers

 **Client Record**

Name	ZZ-Doe, ZZ-John
Name Data Quality	Full Name Reported
Alias	
Social Security	--0001
SSN Data Quality	Approximate or partial SSN reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	59

 

ERRORS APPEARING IN SECTION 6B BELOW (FIGURE 6)

6b - Data Quality: Universal Data Elements		
Data Element	Error Count	% of Error Rate
Veteran Status (3.7)	1	0%
Project Start Date (3.10)	0	0%
Relationship to Head of Household (3.15)	85	9%
Client Location (3.16)	0	0%
Disabling Condition (3.8)	29	3%

Figure 6

» **Veteran Status** – This is a Yes or No reply under the Client Profile tab

U.S. Military Veteran?

No (HUD)

-Select-

Yes (HUD)

No (HUD)

» **Relationship to Head of Household (HoH)** – This HoH category error means that the selection made for the HoH was not correct **OR** there were multiple replies for “Self” (HoH). There can **only be “1 Self/HoH” selection** in the Project Entry Exit. Otherwise, there will be errors (as you see in Figure 6 Above)

Relationship to Head of Household (UDE) *

Self (head of household)

-Select-

Self (head of household)

Head of household's child

Head of household's spouse or partner

Head of household's other relation member (other relation to head of household)

Other: non-relation member

Data not collected

ERRORS APPEARING IN SECTION 6B - CONTINUED (FIGURE 6)

- » **Disabling Condition** – This error (shown above Figure 6) means that the question “**Does the Client have a disabling condition**” is either (1) not answered or (2) client doesn’t know was selected. This is found in the Project Entry/Exit.
- » In addition, the Case Manager must also answer this question in the Entry Exit for **children under the age of 18** – errors will also show because the question was not answered for children.
- » Remember that any answer other than Yes or No with generate an error on the CoC APR. Do not choose from the other 3 options. (see below)

DISABILITY INFORMATION	
Does the client have a disabling condition? (UDE) *	<input type="text" value="Yes (HUD)"/>
	-Select-
	Yes (HUD)
	No (HUD)
	Client doesn't know (HUD)
	Client refused (HUD)
	Data not collected (HUD)

ERRORS APPEARING IN SECTION 6C – INCOME AND HOUSING DATA QUALITY (SEE FIGURE 7 BELOW)

6c - Data Quality: Income and Housing Data Quality		
Data Element	Error Count	% of Error Rate
Destination (3.12)	14	3%
Income and Sources (4.2) at Start	28	10%
Income and Sources (4.2) at Annual Assessment	47	100%
Income and Sources (4.2) at Exit	13	10%

Figure 7

- **Destination** – Destination errors appear because either **(1) “Data Not Collected, (2) Client Doesn’t Know or (3) Client Refused** was selected. Those options should not be chosen as it will create an error on the CoC APR.
- **IMPORTANT NOTE:** If the Client leaves or disappears without any exit interview, then the Case Manager should select **“No Exit Interview Completed”** – this will not create an error even though the Exit Destination is not a positive outcome. (See below)

Edit Exit Data - (186492) Des

Exit Date *

Reason for Leaving

If "Other", Specify

Destination *

Staying or living with family, temporary tenure (e.g., room, apartment or house)(HUD)

Staying or living with friends, temporary tenure (e.g., room apartment or house)(HUD)

Substance abuse treatment facility or detox center (HUD)

Transitional housing for homeless persons (including homeless youth) (HUD)

Other (HUD)

No exit interview completed (HUD)

No exit interview completed (HUD)

INCOME AND SOURCES AT PROJECT START/ENTRY (FIG 7)

6c - Data Quality: Income and Housing Data Quality		
Data Element	Error Count	% of Error Rate
Destination (3.12)	14	3%
Income and Sources (4.2) at Start	28	10%
Income and Sources (4.2) at Annual Assessment	47	100%
Income and Sources (4.2) at Exit	13	10%

Figure 7

» **Income and Sources at Project Start/Project Entry** – An Income error appearing at Project Start/Entry appears because questions are either (1) Not answered, (2) Not Answered Correctly or (3) Yes or No answers do not match with stated income. See below for examples:

Entry / Exit

Project Start Date

01/09/2018

» **Fixing the Income Error at Start** – In the example below, the problem causing the error was that there was **NO INCOME** being reported within the “Monthly Income Questions – there was no YES Answer. The income at the top said Yes, the Income amount at the bottom said 1411. So answers Inside and Outside did not jive. So Case Mgr has to go into Project Entry to fix income..

Income from Any Source Last 30 days? * Yes (HUD) G

Monthly Income

	Source of Income	Is this Income Source?	Monthly Amount	Start Date *
	Worker's Compensation (HUD)	No		05/15/2017
	VA Service Connected Disability Compensation (HUD)	No		
	VA Non-Service Connected Disability Pension (HUD)	No		05/15/2017
	Unemployment Insurance (HUD)	No		05/15/2017
	SSI (HUD)	No		05/15/2017

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Total Monthly Income (MUST BE VALIDATED) 1411 G

1. Income answer Yes
2. Total Income at Bottom: \$1411
3. Error: There was no Income Reported INSIDE the Monthly Income Questions

INCOME AND SOURCES ERRORS AT ANNUAL ASSESSMENT

- » **Income and Sources at Annual Assessment** – This error indicates that (1) the Client Project Entry/Start is still Open/Active after 365 days and requires an “Interim Review” be done on the Anniversary Date (same Date) as the Project Entry. See Figure 7.
- » The first question you should ask yourself: (1) Is the Client still active in your Project? If they are, then an Annual Assessment needs to be done validating the Income and Sources. If the Client is NOT being case managed anymore, then they need to be exited. Confirm what date the client left the program and Exit them. If the Exit Date is still greater than 365 days, they still need an Annual Assessment BEFORE they are exited.
- » Refer to the following workflow to do an Annual Assessment:



04 AM

Project Start Date	Exit Date	Interims
13/2017		
28/2017		4
20/2017	04/20/2017	
HUD 12/14/2016		

Save & Continue Cancel

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
Add Interim Review		No matches.

Exit

INCOME AND SOURCES ERRORS AT ANNUAL ASSESSMENT - CONTINUED

- » After clicking **“Add Interim Review”**, the Add Interim Review screen appears below
 - » Choose **“Annual Assessment”** as type
- Then **“Save and Continue”**

- » Once in the **“Interim Review”** assessment, go to the **“Income Information”** and validate/correct Monthly Income information. **Please ensure that ALL answers BOTH inside and outside are in sync.**
- » If needed Refer back to **Page 12** to re-review validating and answering income questions.
- » Once inside the Interim Review Assessment, you will see the below screenshot at the top of the assessment page.

Entry / Exit Interim Review	
Interim Review Data	
Entry / Exit Provider	CES - Rapid Re-Housing (RRH) Match (811)
Entry / Exit Type	HUD
Interim Review Type	Annual Assessment
Review Date	03/08/2018 12:30:09 PM

INCOME AND SOURCES ERRORS AT EXIT

- » Similar to Income Errors at Project Start/Entry, the same can occur at Project Exit. Those clients showing up on the “Income and Sources Errors at Exit List” indicate that there are wrong or inconsistent answers within Monthly Income section of the Project Exit Assessment.
- » Please review the below scenario (real case) that resulted in an error appearing on the CoC APR. Refer to top of page 12 to see outstanding errors for Income at Exit
- » Go to Entry Exit and click on edit pencil for Exit (below)

Project Start Date	Exit Date
05/03/2017	12/08/2017

Edit Exit Data - [Redacted]

Exit Date * 12 / 08 / 2017 10 : 53 : 20 AM

Reason for Leaving: Completed program

If "Other", Specify:

Destination * Rental by client, with other ongoing housing subsidy (HUD)

If "Other", Specify:

Notes:

- » Go to Income Section of the Assessment (see below)

INCOME INFORMATION (MUST BE VALIDATED)

Income from Any Source Last 30 days? * No (HUD)

Monthly Income HUD Verification

	Source of Income	Receiving Income Source?	Monthly Amount	Start Date *	End Date
	Earned Income (HUD)	Yes	US\$360.00	03/18/2017	
	Worker's Compensation (HUD)	No		11/14/2016	
	VA Service Connected Disability Compensation (HUD)	No		11/14/2016	
	TANF (HUD)	No		11/14/2016	
	VA Non-Service Connected Disability Pension (HUD)	No		11/14/2016	

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Total Monthly Income (MUST BE VALIDATED)

INCOME AND SOURCES ERRORS AT EXIT – CONTINUED

- » Next, click on the Magnifying Glass to open the Monthly Income questions
- » Note that the Income answers outside suggest that client **has NO Income**

INCOME INFORMATION (MUST BE VALIDATED)

Income from Any Source Last 30 days? * G

Monthly Income

Source of Income	Receiving Income Source?	Monthly Amount
------------------	--------------------------	----------------

- » The **Monthly Income Records** for all Income Questions now appear (see below)
- » Note that the Client has Earned Income of 360.00 per month starting on 3/18/2017. The answers outside are No and inside say Yes – this is in conflict and thus creates an “Income Error at Exit.”

Show All Monthly Income Records

Monthly Income							
	Provider	Date Effective	Source of Income	Receiving Income Source?	Monthly Amount	Start Date	End Date
	zz - Community Based Care - Navigator (895)	11/14/2016 2:09:44 PM	Earned Income (HUD)	Yes	US\$360.00	11/14/2016	03/17/2017
	CES - Rapid Re-Housing (RRH) Match (811)	05/03/2017 8:42:53 AM	Earned Income (HUD)	Yes	US\$360.00	03/18/2017	
	zz - Community Based Care - Navigator (895)	11/14/2016 2:09:44 PM	Child Support (HUD)	No		11/14/2016	
	zz - Community Based Care - Navigator (895)	11/14/2016 2:09:44 PM	Alimony or Other Spousal Support (HUD)	No		11/14/2016	
	zz - Community Based Care - Navigator (895)	11/14/2016 2:09:44 PM	Private Disability Insurance (HUD)	No		11/14/2016	
	zz - Community Based Care - Navigator (895)	11/14/2016 2:09:44 PM	Retirement Income From Social Security (HUD)	No		11/14/2016	

- » This is a very common error within the CoC. The BEST way to avoid this error is to open the Monthly Income Error Records to see what the “**Actual Answers**” are. If the client does have income of 360.00 per month (at that time), then the Case Mgr would need to change the **No to Yes and add 360.00 to total monthly income (See below)**

INCOME INFORMATION (MUST BE VALIDATED)

Income from Any Source Last 30 days? *

Total Monthly Income (MUST BE VALIDATED)

CoC APR SUMMARY

- » CoC APR Comments – The CoC APR is the primary Data Quality report that agencies are required to use to monitor their data quality. Please review some of the real benefits of the CoC Apr Report below:
 - ▶ A Canned/Static Report; easy to access and create (efficient)
 - ▶ Accessible to project managers and case managers
 - ▶ Error numbers identify which clients have errors (so error can be corrected)
 - ▶ Live data; Immediate report impact after correcting client data error
 - ▶ Provides MANY data element sets that include:
 - ▶ Validation Table with a breakdown of clients status
 - ▶ Data Quality of personable identifiable information
 - ▶ Income & housing data quality
 - ▶ History of chronic homelessness
 - ▶ Data input timeliness (when was data entered compared to project start date)
 - ▶ Number of persons served
 - ▶ Complete demographics
 - ▶ Numerous sets of useable data that agencies can use to submit their CoC APR and/or compete for City, County, HUD and private funding
 - ▶ Easy to download reports as Excel or PDF file

- » Please look for the CoC APR recordings that will be posted (with a link) on the HMIS Dashboard/Homepage **System News**. You will be able to access this recording that will provide additional help in regards to the CoC APR.

DOCUMENT HISTORY

Date of Revision	Document Version #	Revision Notes
3/9/2018	1.0	First Release of Document