

# HMIS Data Quality Reports

## WHAT'S INSIDE

- How to run required data quality reports
- Tip: Use this guidance along with the "Fixing Data Quality Errors" handout to ensure timely, accurate monthly DQ reports

## Getting Started

Welcome! As a valued user of HMIS, you are front and center of this handout. We hope it contains everything you need to successfully run data quality reports, find any errors and submit your required HMIS data quality reports timely.

	Quantity	Rate	Rating	Cost	Units	Weight	Dimensions W	Dimensions H	Dimensions D
1	774	639	123.09	24	109	223.89	1463	1302	112.37
2	323	191	128.14	78	69	128.61	247	211	1178.16
3	876	854	168.21	69	50	163.85	224	127	178.38
4	1072	571	207.25	481	401	119.89	224	127	178.38
5	136	166	151.51	658	109	824.56	569	271	215.75
6	363	170	213.53	464	463	100.22	144	45	189.47
7	861	647	138.33	223	223	100	120	120	266.67
8	1142	439	228.12	444	443	104.89	230	138	166.67
9	109	43	486.61	1031	748	140.61	1019	762	133.73
10	2862	1989	138.64	1320	1063	124.48	141	141	162.37
11	270	42	852.98	1542	1170	130.31	102	102	106.82
12	172	116	146.61	59	61	111.76	107	72	148.61
13	345	291	171.64	832	418	191.87	102	59	172.89
14	88	48	132.5	102	682	129.68	102	48	188.89
15	43	38	113.38	1168	682	129.68	102	48	208.16
16	48	86	427.31	831	717	141.69	102	43	237.21
17	78	28	287.89	52	38	131.58	20282	37	275.68
18	2467	1700	145.18	1115	749	148.8	71	157	12818.47
19	1925	1348	155.09	35	24	145.83	244	26	273.08
20	1727	868	183.43	819	119	515.15	3941	26	273.08
21	2642	61	489.8	743	218	102.29	3941	93	282.37
22	388	237	324.29	173	89	131.02	341	142	137.5
23	784	427	324.29	385	303	196.83	153	2949	138.48
24	1172	439	296.05	171	72	237.4	319	232	107.75
25	691	489	113.37	832	719	228	102	29	117.24
26	394	489	113.37	832	719	228	102	29	117.24
27	266	64	695.13	1113	38	131.58	20282	37	275.68
28	630	39	553.65	35	743	149.8	71	26	12918.47
29	381	470	122.49	613	24	145.83	244	26	273.08
30	1221	29	810.14	22	118	515.13	244	93	273.08
31	29	4148	109	218	102.29	3941	138.48	142	137.5
32	381	28	897.14	381	323	131.02	341	29	117.24

# Running APR Report in HMIS

## Navigate to Home Workspace>Reports>HMIS Exports>CSV APR-FY2024

### CSV-APR - FY2024

- Ensure you are logged into the correct organization
- All sections on this page must be completed

- **Date Range:** Begin date is when your grant or fiscal year started. End date is the date you are running the report (DQ only).
- **Grant Program:** Funding specific; if unknown, ask.
- **Grant:** Click on all that appear.
- **Project:** only select one per report.
- **Click Run Export Note-**"Generate Validation File" should always be pre-populated.



Run Export Cancel

# Export Encryption

**Export Encryption**

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export:

Include Header Row in CSV File(s):

Always Quote CSV Values(s):

ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s).

I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within

**Done**

**Note:** After selecting Done, the system will show you that your export has been queued and will process at the next available time. While this process is taking place on the backend, you may navigate to other areas in ClientTrack.

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If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

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Encrypt Export:

Include Header Row in CSV File(s):

Always Quote CSV Values(s):

ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s).

I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within

**Done**

- **Step 1:** Uncheck Encrypt Export
- **Step 2:** Select “I assume the full responsibility...” statement
- **Step 3:** Select Done

Search

Reports

Salvation Army ESG

Modesto Users 2020

Data Explorer

**Files on Server**

My Saved Reports

BNLs

HMIS Exports

- APR / CAPER Review
- CSV APR - FY2023
- CSV APR - FY2024
- CSV CAPER - FY2023
- CSV CAPER - FY2024
- CSV CE APR - FY2023
- CSV CE APR - FY2024

Files on Server

Displayed below is a list of the files available for you to download. Files with an expiration date will be available for download by any user and will not be available for processing if used in an import.

[View the status of export or import tasks.](#)

- HMIS APR\_CAPER 2024 Validation\_20240519224217\_TaskID\_138481.zip
- HMIS APR 2024 Export\_20240519224121\_TaskID\_138480.zip
- HMIS APR\_CAPER 2024 Pre-Load 2\_20240519223051\_TaskID\_138479.zip
- HUD Data Quality 2024\_20240519222137\_TaskID\_138478.zip
- HMIS APR\_CAPER 2024 Pre-Load\_20240519222038\_TaskID\_138477.zip

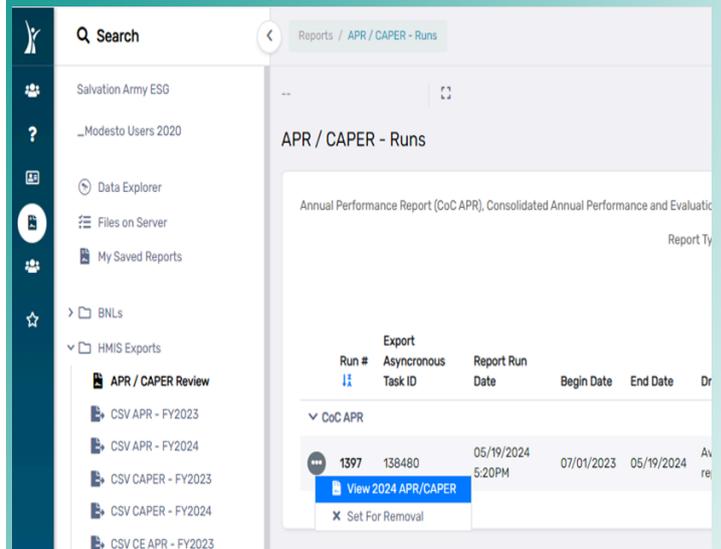
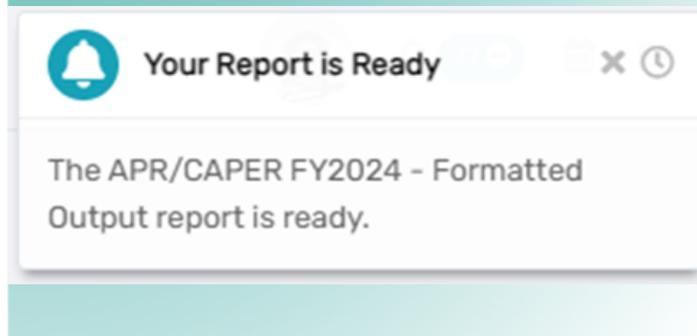
## Report Progress

- Navigate to: **Home**  
**Workspace>Reports>Files on Server**
- Click “View the status of report or report task” if your report is not showing
- Asynchronous Tasks: Select “Show only my tasks”
- Find the status of your report under the “Status” column
- “Completed Successfully”: refresh screen, (select CTRL+F5) to see all files on the server

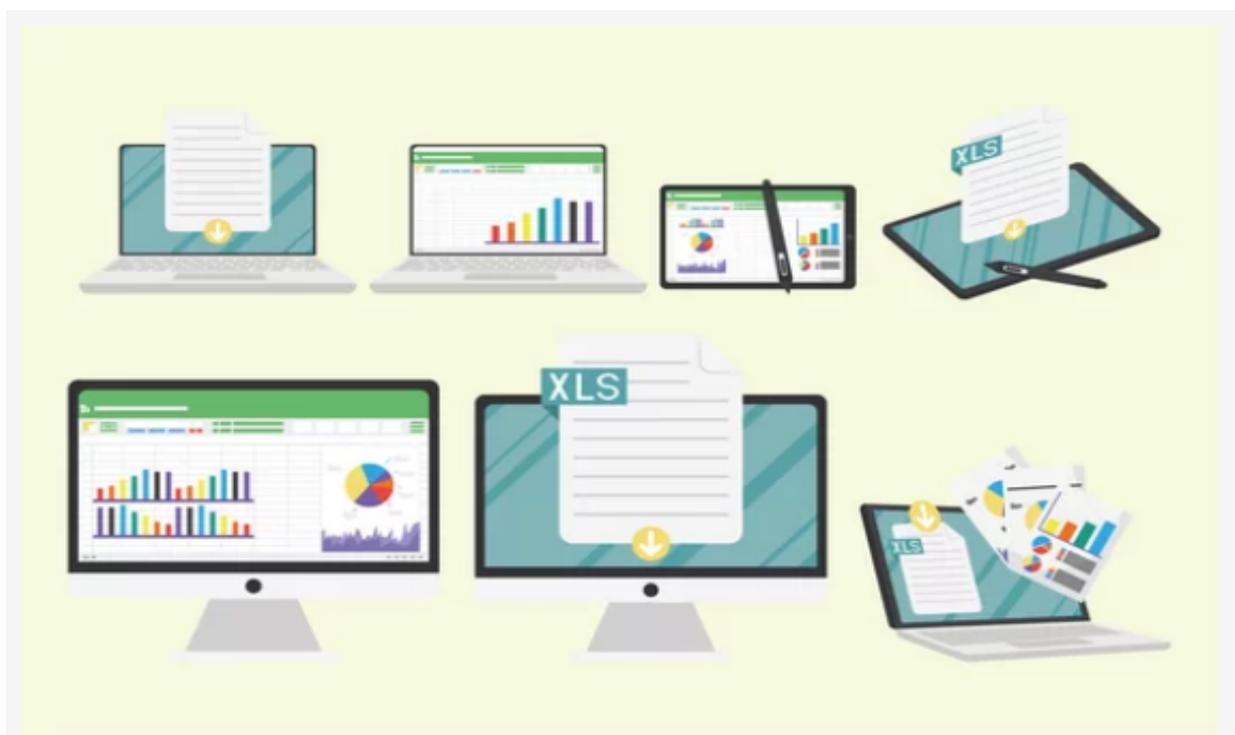
# APR/CAPER Review Report

This review report is a valuable tool for finding and working data quality errors.

- Navigate to: **Home Workspace>Reports>HMIS Exports>APR/CAPER Review Report**
- Launch by clicking on the ellipsis then “View 2024 APR/CAPER
- The system will run the reviewer and tell you when it is ready.

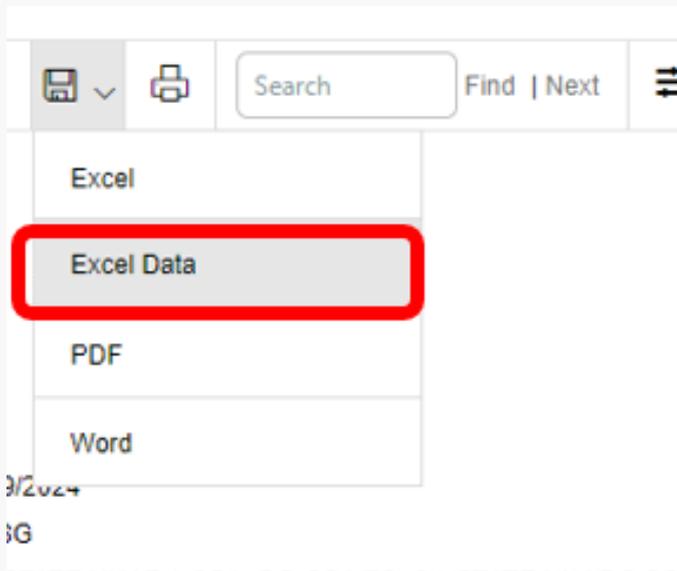


Note: You will not be able to use this reviewer until your APR Export has successfully completed.



## Important facts about the APR/CAPER Review Report

1. Interactive functionality: Users can click on any hyperlink throughout the report to view additional data.
2. Ability to view project set-up information, report date range, counts of clients (including sub-populations such as, veterans and youth), data quality errors, Leavers & Stayers data
3. Users can generate a full detail report by clicking on “Full Detail” option or by selecting the save icon at the top of the report and choosing “Excel Data”:



Note: The report can also be saved as a PDF but once saved in this format, the report will no longer be interactive.

Report Criteria	
Report	APR
Date Range	07/01/2023 - 05/19/2024
Organization(s)	Salvation Army ESG
Funding Source(s)	TSA ES SAP, CA/STATE HHAP 1 CSA, DG CSA ES, CA/STATE HHAP 3 CSA, CA/STATE HHAP 2 CSA, CA/STATE HHAP 4 CSA, CA/STATE American Rescue Plan Act (ARPA), HAPPY DAYS ES, Local - Day Center (ESG), CA/STATE HEAP
Project(s)	TSA ACES
Grant Program	Local or Other Funding Source (Please Specify)
Grant Component	TSA ACES
Include Details	Yes
<b>Q4a Project Identifiers in HMIS</b>	
Organization Name	Salvation Army ESG
Organization ID	SAL
Project Name	TSA ACES
ProjectID	19714
HMIS Project Type	Emergency Shelter - Entry Exit (0)
RRH Subtype	
Coordinated Entry Access Point	Yes (1)
Affiliated with a residential project	
Project IDs of affiliations	
CoC Number	CA-510
Geocode	062292
Victim Service Provider	No (0)
HMIS Software Name and Version Number	ClientTrack by Eccovia v20
Report Start Date	7/1/2023
Report End Date	5/19/2024
Total Active Clients	155
Total Active Households	154

**Q5a - Report Validations Table**

Category	Count Of Clients For DQ	Count Of Clients
Total Number of Persons Served	155	155
Number of adults (age 18 or over)	155	155
Number of children (under age 18)	0	0
Number of persons with Unknown Age	0	0
Number of leavers	3	3
Number of adult leavers	3	3
Number of adult and head of household leavers	3	3
Total Number of Stayers	152	152
Number of Adult Stayers	152	152
Number of Veterans	6	6
Number of Chronically Homeless Persons	95	95
Number of youth under age 25	7	7
Number of parenting youth under age 25 with children	0	0
Number of Adult Heads of Household	154	154
Number of child and unknown-age heads of household	0	0
Heads of households and adult stayers in the project 365 days or more	151	151

## Using APR/CAPER Review for DQ Errors

- Use the data element tables to know where DQ errors are present.
- Click on the links to find out which clients are missing data.
- Links can take you to the client’s dashboard so that you may fix the errors in ClientTrack.
- See “How to fix DQ errors” handout for additional guidance.

Gender (3.06)	0	0	0	0.00%
Overall Score			0	0.00%

**Q6b - Data Quality: Universal Data Elements**

Data Element	Client Doesn't Know Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Veteran Status (3.07)	0	0	0	0	0.00%
Project Start Date (3.10)			0	0	0.00%
Relationship to Head of Household (3.15)		0	1	1	0.65%
Enrollment CoC (3.16)		1	0	1	0.65%
Disabling Condition (3.08)	0	0	0	0	0.00%



Click on the link to find out which client is missing the Enrollment CoC data element.



Report Criteria:

Report: APR  
 Date Range: 07/01/2023 - 05/19/2024  
 Organization(s): Salvation Army ESG  
 Funding Source(s): TSA ES SAP, CA/STATE HHAP 1 CSA, DG CSA ES, CA/STATE HHAP 3 CSA, CA/STATE HHAP 2 CSA, CA/STATE HHAP 4 CSA, CA/STATE American Rescue Plan Act (ARPA), HAPPY DAYS ES, Local - Day Center (ESG), CA/STATE HEAP  
 Project(s): TSA ACES  
 Grant Program: Local or Other Funding Source (Please Specify)  
 Grant Component: TSA ACES  
 Include Details: Yes

Data Element	Number of Clients
Enrollment CoC (3.16)	1
21948 Hopper, Kenneth E	Head of Household without Enrollment CoC
Total	1

Another screen will open displaying the Client ID, name and the error. Click on the Client ID link and the system will take you to the client's dashboard.

# How do I get back to my report?

Once you have fixed the error you can navigate back to the reviewer to continue working any additional errors on the report. Hover over the files icon on the Navigation Pane and you will be able to see the minimized files. Click on the files and you should be taken back to the APR/CAPER Review Report

# Sage HMIS Reporting Repository Upload



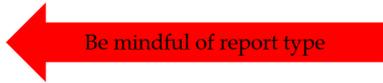
<http://www.sagehmis.info/>

Sage is a web-based reporting system. You do not need log-in credentials to test your report output.

Please select a report that you wish to test from the dropdown list below:

Select A Report

- Select A Report
- CSV-APR FY2024
- CSV-CAPER FY2024
- CSV-CE APR FY2024
- YHDP SRT



Choose File | hmis apr 2024 export\_20240519224121\_taskid\_138480 (1).zip

I'm not a robot

reCAPTCHA  
Privacy - Terms

**Upload and Test**

- Once all correctable errors have been fixed in ClientTrack, you must run a new APR export to upload to Sage.
- Run and download the export to your computer; you can access the export by navigating to the "Downloads" file on your computer.
- Never open the zipped APR export prior to uploading. This will cause you to receive an error in Sage if you attempt to upload an opened file. If you wish to look at the files, create a copy of your export and open your copy instead.
- Ensure you select the correct report type from the dropdown list
- Click to choose file and select your most recent APR Export download on your computer
- Click "Upload and Test"

#### Q4a. Project Identifiers

Organization name	Organization ID	Project name	Project ID	HMIS Project Type	RRH Subtype	Coordinated Entry Access Point	Affiliated with a residential project?	Project IDs affiliated with	CoC Number	Geocode	Victim Service Provider	HMIS Software Name	Report Start Date	Report End Date	Total Active Clients	Total Active Households
Salvation Army ESG	SAL	TSA ACES	19714	0			1		CA-510	062292	False	ClientTrack by Eccovia v20	7/1/2023	5/19/2024	155	154

STEP 2: Review the number of clients being reported on to be sure you have the correct data in the CSV

#### Q5. Report Validations

Category	Count of Clients for DQ	Count of Clients
1. Total number of persons served	155	155
2. Number of adults (age 18 or over)	155	155
3. Number of children (under age 18)	0	0
4. Number of persons with unknown age	0	0
5. Number of leavers	3	3
6. Number of adult leavers	3	3
7. Number of adult and head of household leavers	3	3
8. Number of stayers	152	152
9. Number of adult stayers	152	152
10. Number of veterans	6	6
11. Number of chronically homeless persons	95	95
12. Number of youth under age 25	7	7
13. Number of parenting youth under age 25 with children	0	0
14. Number of adult heads of household	154	154
15. Number of child and unknown-age heads of household	0	0
16. Heads of households and adult stayers in the project 365 or more days	151	151

STEP 3: Create the report if everything is correct

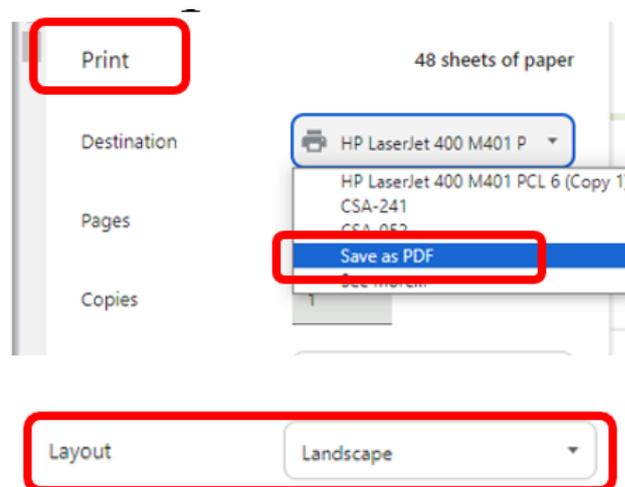
**View your upload**



- Step 1: Verify your project information
- Step 2: Review Numbers
- Step 3: Click on "View your upload"

# Saving/Printing Sage report

- Once your report is visible, right click and select Print>Save as PDF
- Ensure the layout is Landscape. If saved in Portrait, the dates will not be visible on the report.
- Do not right click and select "Save As". This saves the report as a webpage and the HMIS team cannot open it.



## Sage Upload Issues

### Missing Files



CSV-CAPER FY2024 Testing Results - 5/17/2024 7:50 PM

Missing or Extra Files

Missing File: q4a.csv  
Missing File: q5a.csv  
Missing File: q6a.csv



CSV-CAPER FY2024 Testing Results - 5/20/2024 10:16 PM

Wrong Report

Sage requires a CSV upload in the CAPER FY2024 format. You uploaded one in the APR FY2024 format.

You must generate a new CSV from your HMIS in the correct format.

- Missing files: May need to re-run your export. Ensure you complete all APR report parameters in ClientTrack.
- Uploaded different file type than what was selected from drop down menu: Select "Test another upload" and start over making sure to select the correct file type.
- You have the option to enter your email address and Sage will email you a copy of the errors.
- If you need additional assistance with Sage, send an issue ticket through ClientTrack and include a copy of the email from Sage describing the errors.

- All projects entering data into HMIS must run and submit reports by the 10th of each month.
- Please turn in a Sage Detail Report after all DQ errors have either been verified or fixed. The entire report must be submitted for DQ to be considered timely.
- Save a copy of your APR Validation File in order to assist the HMIS team with any questions about DQ.
- Utilize the ClientTrack issue ticket system to submit DQ reports.

## Data Quality Report Expectations