

An Introductory Guide to Submitting Longitudinal Systems Analysis (LSA) Data for the AHAR



Table of Contents

1. Introduction	2
1.1 - What is the AHAR?	2
1.2 - What Data Are Reported for the AHAR?	3
1.3 - Who Should Participate in Submitting the LSA?	3
1.4 - How Will the LSA Data Be Used?	4
2. Setting Up and Managing Your Account in HDX 2.0	4
2.1 - Getting Started in HDX 2.0	5
Creating an Account in HDX 2.0	5
Resetting a Password in HDX 2.0	5
2.2 - Managing Users in HDX 2.0	6
Managing Users in HDX 2.0 as the CoC Primary Contact	6
How to Change Your CoC Primary Contact in HDX 2.0	8
3. Overview of the LSA Submission Cycle and Process	9
3.1 The FY2023 LSA Submission Cycle	9
Data Cleaning & Review Phase:	10
Interim Benchmarks:	11
4. Navigating HDX 2.0 for LSA Data Submission	11
4.1 - Understanding Your HDX 2.0 Dashboard	11
4.2 - Understanding the “View Official Submission Status” Page	11
4.3 - Understanding the “View All Datasets” Page	12
4.4 - The “Upload New” Page: How to Upload Your LSA Dataset Files	12
4.5 - Examining a Dataset	14
Flag Report Tab	14
Warning Flag Statuses	17
Summary Tab	19
5. Support and Resources for the LSA	22
5.1 - Support From Your LSA Data Quality Review Team	22
5.2 - Support From the Ask A Question (AAQ) Desk	22
5.3 - Additional Resources	22

1. Introduction

This guidebook provides background information and guidance on the Longitudinal Systems Analysis (LSA) and the use of this LSA data for the Annual Homeless Assessment Report (AHAR) to Congress. The guide describes the LSA data submission requirements and reviews the data submission process via the [Homelessness Data Exchange](#), version 2.0 (HDX 2.0), a web-based data collection tool. All LSA data submissions must occur through the HDX 2.0.¹

This chapter provides a general overview of the LSA and its use in the AHAR, including a brief discussion of the origins of the project, the types of communities that participate, and the uses of LSA data. The remainder of the guide proceeds as follows:

- [Chapter 2](#) focuses on accessing and managing profiles in the HDX 2.0.
- [Chapter 3](#) provides an overview of the LSA submission process and timeline.
- [Chapter 4](#) covers how to navigate HDX 2.0, including how to upload files, clean data, and address errors and warnings.
- [Chapter 5](#) reviews support and additional resources for the LSA.

1.1 - What is the AHAR?

Every year, HUD submits the AHAR to the United States Congress. The AHAR is a national-level report that provides information about homeless service providers, people and households experiencing homelessness, and various characteristics of that population. The AHAR also looks at patterns of how people experiencing homelessness use different shelter and housing resources. It informs strategic planning for federal, state, and local initiatives designed to prevent and end homelessness.

Abt Global, formerly called Abt Associates, (Abt) is the HUD-assigned contractor selected to complete the AHAR. A team of researchers and technical assistance providers collects, reviews, and analyzes Homeless Management Information System (HMIS) data that CoCs report to HUD via the HDX 2.0. Every CoC will be assigned a Data Quality Review Team consisting of a liaison and a reviewer. The role of the Review Team is to support each CoC through the data collection and cleaning process, review the data, and help the CoC resolve data quality flags. The liaison will be the CoC's main

The **Annual Homeless Assessment Report (AHAR)** is a report to the U.S. Congress on the extent and nature of homelessness in the United States. It provides counts of people experiencing homelessness and describes their demographic characteristics and service use patterns.

¹ LSA data submitted as part of an official U.S. Department of Housing and Urban Development (HUD) submission via the HDX 2.0 may be used by HUD for the AHAR and other HUD-determined purposes. However, neither HUD nor HUD's contractors will make any attempt to re-identify the data, nor will the raw upload data ever be published publicly. LSA data submitted for local purposes is viewable to Abt Associates, the HUD contractor responsible for maintaining the HDX 2.0, but HUD will not use or access any local-use LSA data uploaded and stored in the HDX 2.0 for any purpose, other than to assess whether CoCs are using the functionality.

point of contact through the LSA submission period and the primary resource for questions the CoC has about the process.

Once the data collection and cleaning process has closed, the Abt team analyzes the data and prepares the annual reports, which provide an overview of homelessness during the previous year.

1.2 - What Data Are Reported for the AHAR?

HUD bases the AHAR on three separate aggregate data submissions provided by CoCs: the LSA, the PIT count, and the HIC. In addition, U.S. Census data and other data sources are used for contextual analysis. The LSA data provided by CoCs contains community-level information on people and households served by continuum projects over the course of one year.

For those people and households served by continuum projects during the current LSA report period, the LSA includes:

- Demographic characteristics such as age, race, gender, and veteran status;
- Length of time homeless and patterns of system use;
- Information specific to populations whose needs and/or eligibility for services may differ from the broader homeless population, such as veterans and people and households experiencing chronic homelessness; and
- Exit destinations for those who exit the homeless services system.

As of FY18, “**AHAR**” refers to the annual **written report** to Congress on the state of homelessness in the United States. “**LSA**” refers to the Longitudinal Systems Analysis, which provides **the annual HMIS-based data used** to write the AHAR.

There are 12 CSV files included in the LSA export:

- | | |
|-----------------|---------------------|
| • LSAReport | • Organization |
| • LSAHousehold | • Project |
| • LSAPerson | • Funder |
| • LSAExit | • ProjectCoC |
| • LSACalculated | • Inventory |
| • Affiliation | • HMISParticipation |

1.3 - Who Should Participate in Submitting the LSA?

All CoCs are encouraged to participate in submitting the LSA through their CoC or HMIS leads (the LSA does not accept project-level data submissions). The number of CoCs submitting data for the AHAR has grown significantly since HUD completed the first report in February 2007. HUD hopes that CoCs will continue to participate so this data can inform national priorities for preventing and ending homelessness. As with past AHAR data submissions, HUD may consider participation in the LSA submission process as a scoring factor in the application for funding that CoCs submit to HUD each year.

It is also important to note that all CoCs may participate in the LSA, **regardless of their HMIS bed coverage rates**. All CoCs are encouraged to run their LSA and use the HDX 2.0, as described in this manual and the [Stella P](#)

[Quick Start Guide](#), to view and understand their LSA data. HMIS bed coverage will continue to be an important factor. As in past years, not all *Official HUD Review Files* that are submitted, completed, and confirmed will be used in the AHAR to Congress. For the purposes of the AHAR, data may be deemed not eligible for inclusion in the data analyzed in the report. HUD will inform CoCs after the AHAR publication if their *Official HUD Review Files* were included in the report.

1.4 - How Will the LSA Data Be Used?

The AHAR to Congress is the only source of data that is available annually on the extent and nature of homelessness nationwide. As such, the LSA submission from your CoC is critical to providing federal and local policymakers with a deeper understanding of who is homeless and how homelessness changes over time. This information can be used to inform the public and help policymakers craft appropriate intervention strategies to prevent and end homelessness in the United States. Indeed, LSA data used in the AHAR will assist in tracking progress toward the federal strategic plan to prevent and end homelessness. All available AHAR reports to Congress can be found on the [HUD User page](#).

At the local level, the LSA can also be used by communities who want to better understand the number, characteristics, and service needs of people using homeless services through Stella P. For example, Stella P can provide local communities with a data-driven understanding of their homeless population, which can be used to inform local homeless assistance planning efforts. The HDX 2.0 will allow CoCs to upload and review a “Local Use Zip File” year-round. In addition, CoCs can run the LSA report from their HMIS for any time period and any combination of projects. Communities may wish to use the HDX 2.0 results, shown in the [Summary tab](#) and as a data export from a local-use LSA report for their CoC application, community planning activities, coordinated entry system planning, strategic plans to end homelessness, consolidated plans, or funding applications.

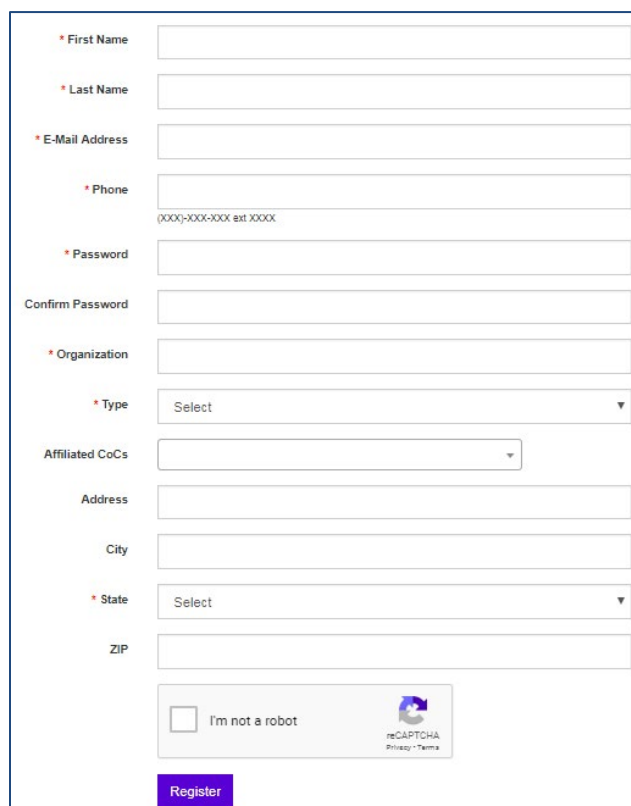
2. Setting Up and Managing Your Account in HDX 2.0

This chapter describes how to access and manage your profile in HDX 2.0. HDX 2.0 is a dynamic, web-based data collection tool that was designed specifically to collect data on homeless programs for HUD. All LSA submissions occur through the HDX 2.0.

2.1 - Getting Started in HDX 2.0

Creating an Account in HDX 2.0

1. Go to the HDX 2.0: <https://hudhdx2.info/>.
2. Click on the “Create an Account” link.
3. Fill out the form shown here with your personal and contact information. You will also need to indicate the CoC(s) you are requesting access to.
 - Note: When entering your contact information, please avoid special characters such as apostrophes.
4. You should receive a confirmation email that your account has been created. You can now log in to the HDX 2.0.
5. If, through the account setup screen, you have chosen a CoC with which to be affiliated, the CoC’s Primary Contact will also receive an email to let them know that you would like to be added to the CoC in the HDX 2.0. ***The CoC Primary Contact will need to grant you access to the CoC before you will be able to review or edit any LSA data.***
6. If you do not receive the automatically generated email from the HDX 2.0, your organization’s spam filter may be blocking the email. If so, you will need to check your spam folder and work with your IT department to troubleshoot the issue. Your IT department may need to tell your system to allow emails from the HDX email address. The email addresses your IT department may need to add to an “allow list,” or add to your address book are: automail@hudhdx2.info and automail@mail.hudhdx2.info. You are also encouraged to check with other users within your organization to see if they have received emails from the system.



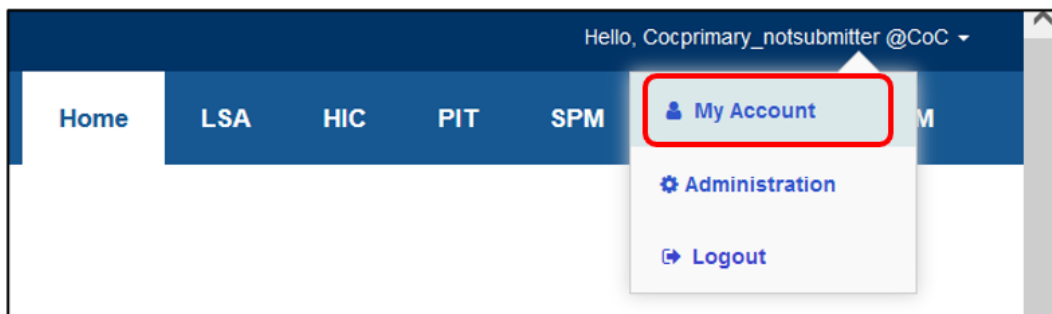
The registration form contains the following fields and elements:

- * First Name: Text input field.
- * Last Name: Text input field.
- * E-Mail Address: Text input field.
- * Phone: Text input field with a placeholder (XXX)-XXX-XXX ext. XXXX.
- * Password: Text input field.
- Confirm Password: Text input field.
- * Organization: Text input field.
- * Type: Dropdown menu with "Select" as the current option.
- Affiliated CoCs: Dropdown menu.
- Address: Text input field.
- City: Text input field.
- * State: Dropdown menu with "Select" as the current option.
- ZIP: Text input field.
- A checkbox labeled "I'm not a robot" next to a reCAPTCHA logo.
- A purple "Register" button at the bottom.

Resetting a Password in HDX 2.0

1. Go to the HDX 2.0: <https://hudhdx2.info/login> and click “Forgot Your Password?”
2. Enter your email address into the field and click the blue “Send Password Reset Link” button.
3. You should receive an email that will include a link to a page where you can reset your password.
4. If you do not receive the email, it’s likely in your spam. Refer to [this step](#) in the [Creating an Account](#) section above.

Once set, you can edit your password whenever you like by clicking on the “My Account” option in the dropdown menu that appears when you click on your name in the upper right corner.



2.2 - Managing Users in HDX 2.0

A CoC Primary Contact is designated for each community based on the Primary Contact listed in a community's CoC registration page on e-snaps. This person is marked as the CoC Primary Contact in the HDX 2.0.

Only the CoC Primary Contact can associate other users with their CoC and assign levels of system access. Levels of access include "read," "write," or "submit" privileges for the LSA. Each CoC should limit the number of users with "write" access to ensure that the data remains secure and accurate.

There can only be one Primary and one Submitter for each CoC. The LSA Submitter is the only person in the CoC who can submit data for the LSA. CoCs should have a backup plan in case the individual associated with your CoC who has submit authority is not available to submit data. The person assigned with "submit" privileges is expected to be the person who will work most closely with the Review Team during the data cleaning portion of this process. Warnings notes will likely need to be submitted more than once if the Review Team needs more information to mark a warning flag as sufficiently addressed (see [4. Navigating HDX 2.0 for LSA Data Submission](#)).

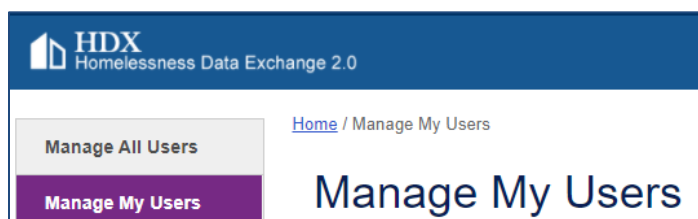
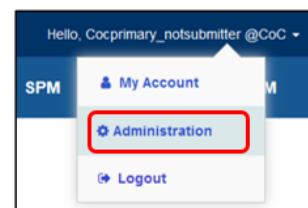
Levels of Access in HDX 2.0 for the LSA Module

1. **CoC Primary Contact:** The CoC Primary is the only one who can assign read, write, and submit access to people registered with their CoC on HDX 2.0.
2. **Submit:** This user is the only one who can submit data for the LSA. Includes write and read privileges.
3. **Write:** Users with write access can view uploads and edit warning notes in the Errors/Warnings Report. Includes read privileges.
4. **Read:** Users with read access can view uploads and warning notes in the Errors/Warnings Report but cannot edit data or notes.

Managing Users in HDX 2.0 as the CoC Primary Contact

If you are the CoC Primary Contact, you can use the instructions below to make any needed updates to the users in your CoC.

1. Access the “Administration” page by clicking on the button that appears when you hover over your name in the top right corner of the page.
2. Click on “Manage My Users” in the left menu panel. This will take you to a page where you will see all the users currently assigned to your CoC, as well as whether they have “read,” “write,” or “submit” access for HIC, PIT count, LSA, and Sys PM uploads. Only LSA data is submitted via the HDX 2.0 at this time. HIC, PIT, and Sys PM submissions will continue to be submitted through the HDX 1.0 until further notice.
3. If you manage multiple CoCs, you can view your users for other CoCs by selecting the CoC name from the dropdown menu in the upper left corner of the listing of users’ names.



4. If you would like to adjust the level of access for a particular user in the list, simply select the appropriate checkmarks for that user across their designated row. Once you are satisfied with the updates, click the blue “Save” button located on the top right-hand side of the user information table. For more information about levels of access, see [2.2 – Managing Users in HDX 2.0](#).

(AA-822L) CoC900													+Add User	Save
	Primary	Housing Inventory			PIT Counts			LSA			SYS PM			Remove from CoC
		Read	Write	Submit	Read	Write	Submit	Read	Write	Submit	Read	Write	Submit	
(AA-822L) CoC900	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(AA-983) CoC 884														
(AC-123) CoC 912														

- ✓ **Note:** CoC Primary Contacts cannot change the CoC Primary Contact designation; a request must be submitted via the HUD Exchange AAQ as described in the next section [How to Change Your CoC Primary Contact in HDX 2.0](#).

5. If you would like to add a user to your CoC, the user must first set up their own account in the HDX 2.0 following the instructions in the [Getting Started in HDX 2.0](#) section of this user guide. Once they have an account in the system:
 - If you have access to multiple CoCs you will need to select the one you wish to add the user to using the drop down on the left of the screen.
 - Click on the blue “+Add User” button located on the top right-hand side of the user information table.

(AA-822L) CoC900													+Add User	Save
	Primary	Housing Inventory			PIT Counts			LSA			SYS PM			Remove from CoC
		Read	Write	Submit	Read	Write	Submit	Read	Write	Submit	Read	Write	Submit	
(AA-822L) CoC900	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(AA-983) CoC 884														
(AC-123) CoC 912														

- Using the “Users” or “Email” fields at the bottom of the screen, search for the name or email of the user(s) you would like to add to your CoC.
- Select the checkbox to the left of their name, then click the blue “Add Selected User(s) to CoC” button located on the top right-hand side on the user information table.

- Check to make sure the user you selected on the previous screen is now listed on the “Manage My Users” page.
- You may now update that user’s level of access, as needed, by following the instructions in Step 4 of this list.

- ✓ **Note:** Any user can *request* access to your CoC, but only the CoC Primary Contact can *grant* access. No one who requests access will be able to see your data until you grant them at least “read” level access.

How to Change Your CoC Primary Contact in HDX 2.0

This section provides instructions for if you need to:

- Request a change in your CoC Primary Contact in HDX 2.0; or
- Requests must be submitted to HUD through the HUD Exchange Ask A Question (AAQ) virtual help desk located at: <https://www.hudexchange.info/get-assistance/my-question/>. Navigate to this link in your browser and you will be taken to a page with “Step One” of a two-step submission process. The text below details this two-step process for submitting a question. See the screenshot of “Step Two” for reference.

In “Step One” of the AAQ submission page, fill out your contact information and then click the green “Step 2 >” button at the end of the form to be taken to the next page.

Once the “Step Two” AAQ page has loaded, follow these steps to complete the presented form:

1. For the “My question is related to” field: use the dropdown menu to select “HDX: Homelessness Data Exchange (including LSA, SPM, HIC, PDX, and Stella P and M)” under the “Reporting Systems” category.
2. Make your subject line the following: “Accessing/Changing CoC Primary Contact in HDX 2.0.”
3. Use the large text box to include your question and any relevant or useful information.
4. Under “Upload related documents,” you must also upload a written PDF of your request:
 - **When requesting change of Primary Contact:** Written request should be on CoC letterhead and contain the following information:
 - i. Name of former CoC Primary Contact and new CoC Primary Contact
 - ii. CoC name and number

- iii. New CoC Primary Contact’s contact information, including: phone, position, email address, mailing address, etc. (Please make sure the new CoC Primary Contact has already set up an account on the HDX 2.0: <https://hudhdx2.info/>)
 - iv. Reason for request
 - v. Signature of an authorized person – board chair, executive director, etc.
- **If you need to request a change of Primary Contact temporarily, please follow the steps above.**

- When you have completed the form, click on the blue button that reads “Submit Your Question” at the bottom right corner of the form. You will receive a confirmation email that your question has been submitted, as well as a reference number that has been assigned to your question.

3. Overview of the LSA Submission Cycle and Process

This chapter provides an overview of the LSA submission process for FY2023. This includes the schedule for this year’s process, what to expect during the Initial Upload Phase and the various phases of the LSA submission process.

3.1 The FY2023 LSA Submission Cycle

The timeline for the FY2023 LSA submission process is subject to change at HUD’s discretion. Specific dates and deadlines will be announced via the HUD Exchange listserv, as well as posted on the HDX 2.0 homepage. Always check these resources for the most up-to-date information. The dates for the FY2023 LSA submission process are:

	Date(s)	Description
Data Cleaning & Review	November 4, 2024, to January 17, 2025	CoCs work with their Review Team to review and address data quality issues. When CoCs are ready for their Review Team to review their warning flag notes, they can “Submit for Review.” CoCs should continue to upload <i>Official HUD Review Files</i> throughout this phase until uploads have as few errors and warnings as possible. By the end of the phase, all remaining warnings should be addressed with comprehensive notes.
Successful Upload Interim Benchmark	November 13, 2024	By this date, CoCs should have logged into the HDX 2.0 and had at least one successful upload of an “ <i>Official HUD Review File</i> ” for the FY2024 reporting period (10/1/2023 – 9/30/2024). If an upload fails, CoCs should work with vendors to resolve formatting and programming errors in the file.

	Date(s)	Description
Thanksgiving Holiday Break Period	November 27, 2024, to November 29, 2024	During this time, Review Teams will not be available for support. CoCs are welcome to continue uploading and cleaning their data.
Initial Review of Warning Flags Interim Benchmark	December 12, 2024	By this date, CoCs should have at least one successful upload and have submitted notes related to warnings. Since this process is iterative, it is expected that CoCs will go back and forth with the Review Team to resolve any issues in the datasets before the end of the Data Cleaning & Review period.
Winter Holiday Break Period	December 23, 2024, to January 1, 2025	During this time, Review Teams will not be available for support. CoCs are welcome to continue uploading and cleaning their data.
Final Submission Deadline	Thursday, January 9, 2025, at 11:59pm Pacific Time	By this time, data errors should have been eliminated from uploads (to the extent possible) and all warnings should be addressed with comprehensive notes.

Data Cleaning & Review Phase:

The purpose of the Data Cleaning & Review Phase is for CoCs to work with their Review Team to review and address data quality issues. Error and warning flags are immediately generated within HDX 2.0 upon the successful upload of an *Official HUD Review File*. Errors are impossibilities in the data. Warnings are possible, but unlikely. CoCs can clean data in their HMIS system to address error and warning flags or provide notes in the HDX 2.0 to explain warning flags that refer to accurate data (read more on examining a dataset [here](#)). When CoCs are ready for their Review Team to review their warning flag notes, they can “Submit for Review.” CoCs should continue to upload *Official HUD Review Files* throughout this phase until uploads have as few errors and warnings as possible. Over the course of the entire LSA Submission Period (11/4/2024 to 1/9/2025), CoCs should expect to upload and review multiple LSA files in the HDX 2.0, replacing old uploads with new uploads to increase the quality of the data.

LEGEND

	Data Cleaning & Review Phase
	Holiday Break Period
	Interim Benchmarks
	Final Deadline

November, 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
December, 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
January, 2025						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Interim Benchmarks:

Two interim benchmarks have been included in this year's calendar to help CoCs mark their progress and time their efforts to successfully address all errors and warnings by the final deadline. By the Successful Upload Interim Benchmark users should have accessed the HDX 2.0 and **uploaded at least one Official HUD Review File**. Please note that there are two upload types – *Local Use Zip File* and *Official HUD Review File*.

- Local Use Zip Files are for testing uploads or for uploading partial HMIS data for Stella P purposes.
- Official HUD Review Files are the files that HUD and the Review Team will consider in their review process.

Once an *Official HUD Review File* is successfully uploaded, errors and warnings will be generated. The purpose of this benchmark is to encourage CoCs to have a successful upload with enough time to review and address the flags generated from a successful upload.

By the Initial Review of Warning Flags Interim Benchmark, CoCs should have been cleaning their data, working with their vendor, and reuploading *Official HUD Review Files* to reduce the total number of error flags populating in the HDX 2.0. By this benchmark, CoCs should have started to look at their warning flags and started cleaning data or providing notes explaining the data as appropriate. The purpose of this benchmark is to ensure that CoCs start engaging early enough in the iterative process of submitting warning notes for review since often multiple rounds of review are needed before all warning notes are adequately addressed.

Note: CoCs do not need to wait for these benchmarks to start completing the next stage of the Data Cleaning & Review process. Additionally, if CoCs have not completed the interim benchmarks by the dates in this calendar, there is no penalty. CoCs are encouraged to engage in this process in a way that makes sense for their team and schedule and to reach out to their Review Team for assistance when needed. Additionally, CoCs can utilize [Eva](#)—a tool that identifies data quality issues in a CoC's local HMIS system—to assess and address the accuracy and completeness of their HMIS data at any time.

4. Navigating HDX 2.0 for LSA Data Submission

4.1 - Understanding Your HDX 2.0 Dashboard

The “Dashboard” is the HDX 2.0 home screen. From here, you can keep up to date on current deadlines and access various HDX modules and resources.

4.2 - Understanding the “View Official Submission Status” Page

You can navigate to the “View Official Submission Status” page by clicking on “LSA” in the upper right-hand corner of the dashboard or via the “View LSA” button on the Dashboard. This page displays all *Official HUD Review Files* for every CoC with which you are affiliated. You may sort, search, and filter these results. You may find the export function useful so you can print and share status results with others outside of the HDX 2.0. The green export button can be found on the upper right-hand side of the CoC status summaries table. From this page, you may view the data for each submission by clicking directly on the hyperlinked file name in the row titled “File Name.”

[Home](#) / [LSA](#) / View Official Submission Status

View Official Submission Status

Welcome to the Longitudinal Systems Analysis(LSA) module. Here, you can upload, view, and notate official and local-use LSA datasets. A summary of progress for all **official** HUD submissions for each of your affiliated CoCs is displayed below. Local-use datasets can be found using the "View All Datasets" view. Use the menu on the left to navigate to "Upload New LSA" to upload new official or local-use LSAs.

Primary Submitters: Please click the 'Submit for Review' button when you have left comprehensive notes on your warning flags and are ready for the HDX Team to review your dataset.

[Export](#)

Show **10** entries Filter by Reporting Year **2024** Filter by AHAR Region **Select Region** Search:

CoC Code	CoC Name	File Name	Reporting Year	Date Report Generated	Date of Upload	Dataset Status	Submitter	Primary	Date Submitted	# of data errors	# of warning flags	# of warnings with CoC notes
XX	CoC Name	File Name	Reporting	Date Repr	Date of U	Dataset Status	Submitter	Primary	Date Sub	# of dat	# of warn	# of warnir
XX-501	Testing CoC	Stella P Testing -version 2	2023	12/06/2023	12/07/2023	NEEDS CoC REVIEW		Cocprimary @CoC		3	0	0

4.3 - Understanding the "View All Datasets" Page

You can navigate to the "View All Datasets" page by clicking on the "View All Datasets" button in the left-hand menu of the "View Official Submission Status" page. This page includes a record of all datasets that have been uploaded to HDX 2.0 for the CoCs that you are affiliated with. These datasets include rejected and accepted Local Use Zip Files as well as *Official HUD Review Files*. You can filter the "Upload Status" column for datasets that have an upload status of "Accepted."

4.4 - The "Upload New" Page: How to Upload Your LSA Dataset Files

From any page in the LSA module, locate the gray left-hand menu. Click on "Upload New."

HDX Homelessness Data Exchange 2.0 [Home](#) [LSA](#)

[View Official Submission Status](#)
[View All Datasets](#)
[Upload New](#)

Upload New LSA File

Files must meet the required LSA programming specifications (found in the "Resources" section on the main HDX 2.0 page) in order to be successfully uploaded.

You may upload a local use or official HUD review file for any CoC for which you have Read/Write access, as indicated in the dropdown menu below.

If you are uploading a file for official use, note that the file will need to be "Submitted for Review" by the user with submit privileges. Only one contact per CoC can have submit privilege privileges in your CoC, please ask your Primary or submit a question to the [FAQ page](#).

You can access your uploads or records of attempted uploads in the View All Datasets page, accessible via the menu on the left.

Upload File

* indicates required fields.

* Reporting Year: **2024**

* File: [Browse to find file](#)

File Name:

Upload Date: **10/19/2023**

Upload Type: **Official HUD Review File**

* Upload Name:

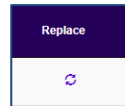
* CoC: **Select an Option**

File Comments/Description:

You are about to upload your Official HUD Review File dataset. Your dataset will be screened for upload errors.

[Upload](#)

- 1) From this interface, you may upload an LSA file for any CoC with which you are affiliated. Click on the blue “Browse to find file” button located in the middle of the page (circled in red in the image to the right).
- 2) Fill in the required fields on this short form. A few key pieces to note for this form are listed below:
 - a) Here, you may select whether the upload is **Local Use Zip File** or **Official HUD Review File**.

Local Use Zip File	Official HUD Review File
<p>The Local Use Zip File option allows CoCs to upload and review LSA data for local use year-round. CoCs may use this to begin to review their <i>Official HUD Review Files</i> or to upload and store LSA files run on alternative time periods or smaller geographic regions, especially for use with Stella P. There is no limit to the number of LSA files that can be stored in the HDX 2.0. Please note that only a subset of errors and warnings are produced for local use zip files. To see all flags generated for the LSA, CoCs will need to upload an <i>Official HUD Review File</i>.</p>	<p>Official HUD Review Files are files that can be officially submitted to the LSA DQ Team for use in the AHAR. You are only permitted to upload one <i>Official HUD Review File</i> per reporting year at a time. We recommend using the “replace” functionality on the “View All Datasets” page when you need to replace an <i>Official HUD Review File</i>. This will maintain all warning notes from one file to the next. If you delete your Official HUD Review File and upload a new one, warning notes will not be maintained. Locate the <i>Official HUD Review File</i> you wish to replace from the list, click the “replace” icon for that upload, and proceed through the rest of the steps as with the original submission.</p> 

- b) In the Upload Name field, name the file in such a way that it will be clear to you in the future which one this is. If you plan to use the HDX 2.0 to view a number of *Local Use Zip Files* throughout the year, consider a clear naming convention that you and your colleagues can use over time.
- c) If you are affiliated with multiple CoCs, you will need to select from your affiliated CoCs in the required CoC field. Note that if you have already uploaded an *Official HUD Review File* for a given CoC the CoC name will not appear – you will have to replace your existing upload.
- d) CoCs can use the optional “File Comments/Description” textbox to make any relevant notes about local use files throughout the year (e.g., “Service Area 1” or “this upload is our second quarter data only”). CoCs can also use it to leave any relevant notes for the Review Team. These notes are tied to the dataset and are viewable on the Flag Report page.

Note: Each CoC can only have one *Official HUD Review File* per reporting period. If you are receiving an error regarding this or do not see your CoC listed in the dropdown menu, please check to ensure you have selected the correct reporting year at the top of the screen and review your “View All Datasets” screen to ensure there is not already an *Official HUD Review File* submitted for that year. We recommend using the “Upload New” button the first time you upload an *Official HUD Review File*, and then using the replace functionality for all future uploads.

- 3) Once the form is complete, click the blue “Upload” button at the bottom of the form.
- 4) After clicking this button, the data will be run through the “Formatting and Upload Error Check.” You will be taken to an “Upload Status” screen that indicates whether your upload file was accepted or rejected. This process may take a few minutes depending on the size of your file and speed of your internet connection.

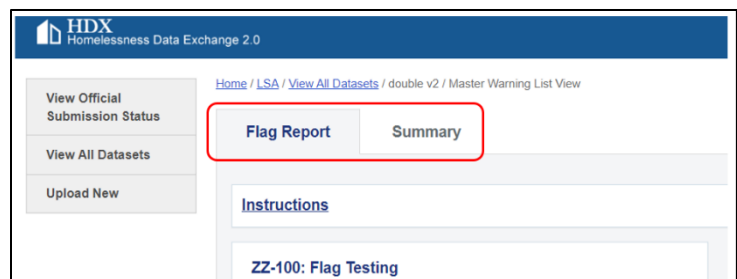
- **If your file was rejected**, you will be able to print an error report that outlines the issues with the upload file. To do so, click on the blue button reading “Print Error Report” that appears under the “Rejected” status toward the bottom of the page. Work with your HMIS vendor to make updates to your files to address these errors. Once addressed, you can either click the blue “Replace Upload” button that appears at the bottom of the rejection status page or begin these steps again. Repeat these steps until your upload is accepted.
- **If your file was accepted**, click the blue “Return to my list of datasets” button that appears under the status at the bottom of the page. Once you have returned to the “View All Datasets” page, make sure the file you uploaded appears in the list on that page.

Upload Error

An upload error is a structural error that prevents a CoC from uploading a file. This may be something like the date range being incorrect, a missing column, or uploading data for a CoC that is different than the CoC you selected in the “Upload Data” screen. Upload errors must be resolved before you can successfully upload data.

4.5 - Examining a Dataset

To view your LSA data on the HDX 2.0 platform, you can click the file name on either the “View Official Submission Status” page or the “View All Datasets” page. This will take you to a page where you can view tabs with data generated by your upload.



Each of these data views are shown as tabs at the top of the page; the active tab is the one that is highlighted. You can toggle between the tabs by clicking on the one you would like to view.

Flag Report Tab

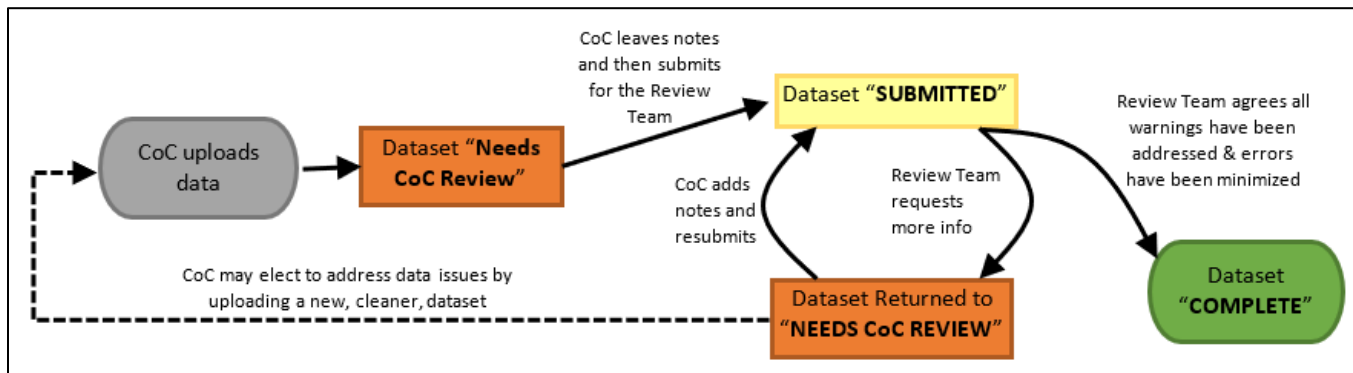
In the “Flag Report” tab you will see a box that indicates the “Dataset Review Status.” Every dataset has a “Dataset Review Status.” Each of these statuses are described in the info box below. After an upload passes the “Format and Upload Error Check” the Dataset Review Status will have a status of “NEEDS CoC REVIEW” by default. When a dataset has this status, users should examine the errors and warnings in the Errors/Warnings view.

This is the place where you can review your error flags and leave notes for warning flags. If an error or warning can be addressed by addressing issues in your HMIS system, you should update data in your HMIS system, re-export your LSA, and then **replace** your *Official HUD Review File*. Once you have sufficiently addressed most/all warnings with notes, you should submit the dataset for review by clicking the “Submit For Review” button above your Errors/Warnings Report.

When the dataset status is “SUBMITTED,” your Review Team will attempt to review your submission within two business days. **The LSA review teams cannot view your files until you hit “submit,” so please make sure you take this additional step.** Please note that the turnaround time will be influenced by the number of submissions that are coming in. Please only submit for review when you have done everything possible to reduce the number of errors and to completely address all warnings.

Dataset Status	Description
NEEDS CoC REVIEW	Errors and warnings are available for CoC review. Notes should be left by the CoC.
SUBMITTED	The CoC has taken steps to limit errors and has left notes for warnings. The CoC would like the Review Team to review the CoC's warning notes and provide feedback.
COMPLETE	The Review Team has determined that no further actions can be taken to remove any remaining errors or to address any remaining warnings.

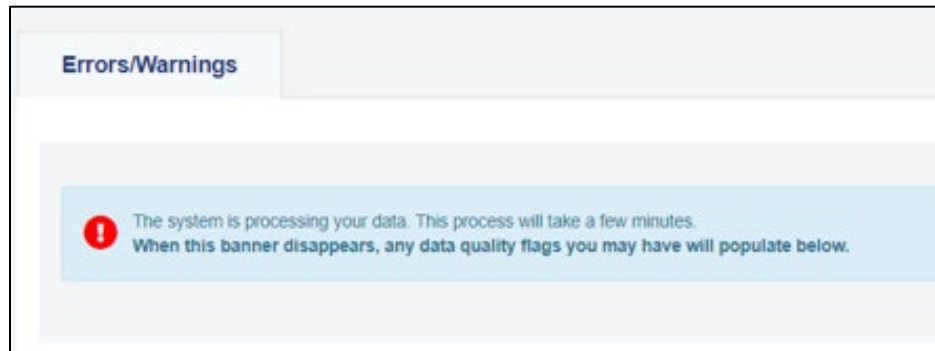
If, during their review, your Review Team finds that you have done everything in your power to reduce the number of errors and sufficiently addressed all warnings, then they will mark the dataset as “COMPLETE.” However, if more information is required of you, then your Review Team will revert the status back to “NEEDS CoC REVIEW” At this point, you may decide to add additional notes in your already uploaded dataset or to go back to your HMIS to clean the data so that you can replace your *Official HUD Review File* and begin the process again.



There are two ways that you can examine your Errors and Warnings. The first is via the [Tabular view](#) of the Errors/Warnings report which gives a full picture of all the errors and warnings that were flagged in the data. The second is via the [Record-by-Record View](#), which allows you to look more in depth at a single error/warning. These are described in the following two sections.

Errors/Warnings Report – Tabular View

This view is designed to allow you to see all warnings and errors in one place. When you upload a new dataset, or replace your dataset, it may take several minutes for the system to calculate your data quality flags. While the system is calculating your flags, you’ll see the following blue banner in the Errors/Warnings tab:

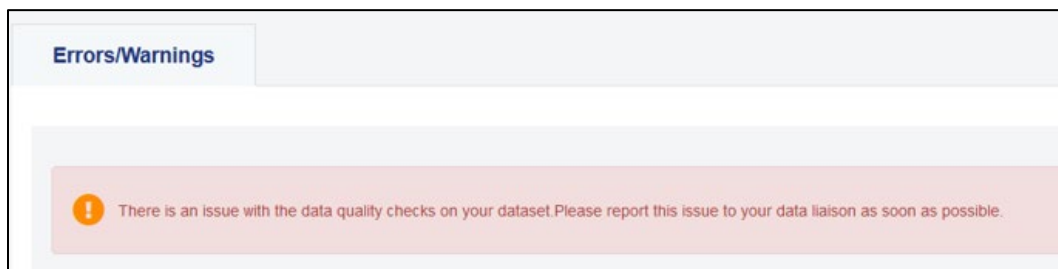


When the system is done, the blue banner will be replaced with a table showing all of warnings and errors for your dataset.

Flag ID	Flag Type	Flag Status	Flag Category	Latest CoC Note	Latest Review Team Note	Vendor/CoC Issue	Flag Data Field Description	Flag Data Field Value
813-1.93	Error	N/A	Geography	N/A	N/A	CoC	ProjectID	93
813-1.95	Error	N/A	Geography	N/A	N/A	CoC	ProjectID	95
813-1.97	Error	N/A	Geography	N/A	N/A	CoC	ProjectID	97
813-1.993	Error	N/A	Geography	N/A	N/A	CoC	ProjectID	993
905-3	Warning	Note Required	Comparisons with the HIC/PIT...		test	CoC	LSA: Total people served (fro...	250
1139-1	Warning	Note Required	Comparisons with the HIC: Bed ...		test note from liaison	CoC	ES Projects: AO households - H...	378
1141-1	Warning	Note Required	Comparisons with the HIC: Bed ...			CoC	ES Projects: AO households - v...	0
1142-1	Warning	Note Required	Comparisons with the HIC: Bed ...			CoC	ES Projects: AO households - y...	1

Note that every flag – that is, every row – of the tabular view will have a colored “Flag Status” field. The point of the flag status is to keep track of whether a given warning has been sufficiently addressed with a note.

If the HDX runs into issues while trying to process your dataset and calculate your flags, you’ll find the following red banner. If you come across this banner, please reach out to your data liaison so they can help diagnose the cause. You may also want to review the current [LSA Programming Specifications](#) to make sure your dataset is structured appropriately.



Warning Flag Statuses

Warning Flag Statuses

Every warning flag has a status. These statuses are depicted in the table below. Note that error flags do not have a status because error flags cannot be explained by a note and should not appear in your data at all.

Warning Flag Status	Warning Flag Status Description
Note Required	This is the default status for all warnings the first time they are observed in HDX.
CoC added notes - Review Team assessment needed	The HDX will automatically mark a warning with this flag status after you enter a flag note.
More info needed from CoC	The Review Team will mark a warning with this flag status if they need more information in order to understand the cause of the data issue.
Data have changed - more info needed from CoC	The HDX will automatically mark a warning with this flag status if you replace your data upload and the data that caused the warning have changed, thus any note you entered may no longer apply.
Note sufficient - LSA data accurately reflects community	The Review Team will mark a warning with this flag status when they feel your notes successfully explain why the data issue exists, but the submitted LSA data is still accurate.
LSA data does not accurately reflect community	The Review Team will mark a warning with this flag status when they feel your notes indicate the warning was triggered due to inaccuracies in the submitted LSA data.
Issue unresolved by deadline	The Review Team will mark a warning with this flag status if the CoC note indicates they will not be able to address the issue by the end of the data collection period.

By default, all warnings begin with a status of “Note Required.” However, as soon as you leave any note in the system, you will see that the status of the warning flag will automatically change to “CoC added notes – Review Team assessment needed.” That is, the HDX 2.0 assumes that any note you leave is reviewable, so please leave a comprehensive note that explains either 1) how and why the warning is an accurate reflection of your community’s data or 2) how you have done everything possible to resolve the warning and have been unable to address the issue.

If, during their review, your Review Team finds that your note does not sufficiently explain the issue, your Review Team will change the flag status to “More info needed from CoC.” If your note does sufficiently address the issue, your Review Team will change the flag status to “Note Sufficient – LSA data accurately reflects community.” The flag status of “Issue unresolved by deadline” is for uncommon instances when CoCs have done everything possible to address a warning and it cannot be addressed further or the CoC is unable to address the issue within the data cleaning period and has provided a sufficient explanation of the situation.

If you replace your *Official HUD Review File*, and a given warning remains from the previous file, but the underlying data that triggered that warning has changed, then the status for that flag will automatically change to “Data have changed - more info needed from CoC.” For example, if a given project’s utilization rate was 35% in the previous upload and 30% in the current upload the low utilization rate warning still applies but the underlying data have changed.

The tabular view of the Errors/Warnings Report is also available for download into a spreadsheet format by clicking the blue “Export” button above the dataset, and then selecting “Flags Export” from the dropdown menu. This may be useful if you are interested in taking stock of the work necessary to clean the dataset as a whole. However, please keep in mind that the entire review process now takes place in the HDX 2.0 interface and so any notes that you make in your own spreadsheet-based copy of the errors/warning flags will not be upload-able into HDX. Another option from the blue “Export” button is for you to download the “Current ZIP File” which is the most recently uploaded Official HUD Review ZIP file.

Errors/Warnings Report – Record-by-Record View

The Record-by-Record View is accessible by clicking on the “Flag ID” of any given error or warning. This view provides a way to examine one error or warning at a time.

The top left portion of the record-by-record view provides some basic information about the nature of the flag: the ID, type, data source, level, category, and description.

The “Variables” section in the lower left hand of the Record-by-Record View displays all the variables that are relevant in identifying or calculating the error/warning. You may need to refer to these when making corrections in your HMIS data.

In the top right portion of the Record-by-Record View you will see that you can leave notes. These notes will be stored in a Review Team threaded conversation format that will allow you to have an asynchronous conversation with your Review Team. Your Review Team’s notes will offer useful guidance or make additional requests when you have to re-review the warnings. Please leave notes that are as comprehensive as possible every time you leave a note, that way the Review Team will only have to review the latest note to make sense of the data. This year you will have the ability to edit or delete a recently entered note, provided the dataset status is still in “NEEDS CoC REVIEW”.

IMPORTANT NOTE

PII is data that identifies an individual either directly, through manipulation, or linking to other data. **HUD considers HMIS Client ID to be PII**, as well as name, date of birth, and SSN.

Please **do not include PII** in any of the files you upload to HDX, notes made in the HDX or send via email to the data review team – including screenshots of Eva or your HMIS!

Previous Next ×

ID 934-1 **Type** Warning

Data Source LSACalculated **Level** CoC

Category
Length of Stay

Description
All people in Adult-Only households in ES: The average length of stay (156.93) (which is derived from your LSACalculated file as total bed nights divided by total people) is unusually long for ES adult-only households. By "unusually long" we mean the average length of stay is more than 120 days. Please confirm and explain. Please confirm and explain. If the length of stay is determined to be accurate, are there any specific factors that could have potentially contributed to longer

Variables

#	Description	Value
#1	AO HHs in ES: Average length of stay (number of nights) for all people	156.93
#2	Number of bed nights for people in household (ReportRow=56) where Cohort=1 (Active in the current report period) & Universe=11 (ES Project Type) & HHType=1 (AO (adult only)) & Population=0 (All)	8631
#3	Number of all people in household (ReportRow=53) where Cohort=1 (Active in the current report period) & Universe=11 (ES Project Type) & HHType=1 (AO (adult only)) & Population=0 (All)	55
#6	AO HHs in ES: Total people	55

Note History

Cocprimary @CoC 10/18/2023 10:49:40 ET:
We have confirmed with the project that a large number of clients needed to stay sheltered for the entire year, causing the average length of stay across all clients to be very long.

New Note

Save

Flag Status

CoC added notes – Review Team assessment needed

Previous Next

In the lower right portion of the Record-by-Record view there is a “Flag Status” field. Every flag has a flag status. Data errors always have a flag status of “Not Applicable” because they cannot be addressed with notes. All warnings will have one of seven statuses). The point of the “Flag Status” is to signal if the warning has been sufficiently addressed. By default, all warnings will begin with a “Flag Status” of “Note Required.” The only location you will be able to leave notes to address warnings is in the Record-by-record View.

Before you submit your upload to your Review Team, your goal should be to have an upload that has 1) as few errors as possible 2) warnings with comprehensive notes (that is, all your warning flags should have a flag status of “CoC added notes – Review team assessment needed”, “Note Sufficient – LSA data accurately reflects community”, or “LSA data does not accurately reflect community”).

Summary Tab

The “Summary” tab displays demographic and system use data calculated for each dataset. These are a small subset of the data that can be compiled from your LSA upload.

You can review the data by reporting category or population group by selecting the appropriate tab. These tabs stand for:

- AO: Adult Only (data for all households that do not include any children);
- AC: Adult and Child (data for all households that include both adults and children);
- CO: Child Only (data for all households that only include children and do not include adults); and
- System Use: Data by Population (data showing how AO, AC, and CO households used the different project types in your community)

On each of the four tabs, the dropdown arrows give you the option to expand and collapse the different categories to see the data related to each of them.

For example, expanding the “Veteran Status” row on the “AO” tab will show you the total number of heads of households and adults served by veteran status for adult only households. The data is broken down by project type.

AO ?	AC ?	CO ?	System Use ?	Replace Upload	Export ▼
					Expand All
Summary					▶
Gender of HoH and adults					▶
Age in yrs of all persons in HH					▶
» Veterans Age in yrs of veteran					▶
Race and Ethnicity of HoH and adults					▶
Veteran Status of HoH and adults					▼
Veteran Status	ES,SH,TH	RRH	PSH	Edit general note for this category	
Veteran	29	153	55		
Non-Veteran	112	56	33		
Missing, DK, or Refused	2	0	2		
» Veteran Characteristics					▶

While looking through these summary tables, some questions you may want to ask, include:

- Do these data look accurate given my knowledge of our CoC?
- Are there any numbers that stand out as being too big or too small?
- Would it be possible to reduce the percent of persons missing veteran status?

If after reviewing your summary data, you find that you need to make changes in your HMIS and re-run/re-upload the LSA file, you can click on the button that reads “Replace Upload” on the top right-hand side of the summary table.

If you would like to download or print your data, you can also do that from the Summary tab. On the right-hand side of the summary table, you will see a green button that reads “Export.” If you click on this button, you will be presented with a dropdown menu with several options:

- “Summary Data” will download a CSV file of the data displayed in the summary data tables.
- “Request Full Analysis File” will download a CSV file that includes more data points than can be displayed on screen. The file takes several minutes to generate, and an email will be sent to the uploader when the system finishes.
- “Full Analysis File” will appear after you have requested the full analysis file and it has finished processing.

5. Support and Resources for the LSA

5.1 - Support From Your LSA Data Quality Review Team

As described in the [LSA Submission Cycle](#) section of this user guide, CoCs will each be assigned a Review Team during the LSA submission window. This Review Team will reach out to the CoC Primary and LSA Submitter early in the submission window to establish contact. The Review Team will be the CoC's main point of contact during the Data Cleaning & Reporting period.

The Review Team will communicate with CoCs through one of several regional email inboxes from Abt Associates (e.g., AHAR_Region2@AbtAssoc.com).

5.2 - Support From the Ask A Question (AAQ) Desk

Should a CoC encounter issues outside of the submission window, please use the instructions below to submit questions to the AAQ desk:

1. Navigate to this link: <https://www.hudexchange.info/get-assistance/my-question/>. A page with "Step One" of a two-step submission process will appear.
2. Follow the prompts to fill out the first form.
3. In the second form,
 - a. Click the "HDX: Homeless Data Exchange..." option in the "My question is related to:" field.
 - b. Leave a concise and descriptive Subject Line about the question.
 - c. In the large text field, please describe the issue with as much information as possible. For example, if there was an error in the HDX 2.0, please indicate the error number, the task being attempted when the error occurred, and the date and time of the error.
 - d. Under "Upload related documents," it is possible to upload anything that may be useful while considering the question. This may include screenshots or error reports. **Do not upload anything that includes Personally Identifiable Information, such as names, dates of birth, social security numbers, addresses, contact information, etc.**
 - e. When the form is completed, click on the button that reads "Submit Your Question" at the bottom of the form. A confirmation email will be sent confirming that the question has been submitted. The email will include the number assigned to the question for reference. A response will be sent via email through the HUD Exchange.

5.3 - Additional Resources

In addition to this user guide, users may benefit from the additional resources below to assist with the submission process:

- [HMIS Project Setup Tool](#): This tool provides a general framework to support project setup in HMIS by system administrators to ensure that all HMIS participating projects are set up using the appropriate HMIS project types and are collecting the required data elements.
- [2024 HMIS Data Standards](#): The documentation of requirements for the programming and use of all HMIS systems and comparable database systems, updated June 2024.

- [LSA Report Specifications and Tools](#): Tools, including written specifications and SQL code, to support HMIS software providers in programming the HMIS LSA report file.
- [Preparing for the LSA: Guidance on Common Data Quality Issues](#): This resource helps communities understand, prevent, and address common data quality issues before, during, and after the LSA data cleaning period.
- [LSA Common Flags Library](#): This resource identifies some of the most common flags CoCs experience when working through the LSA process. The resource includes a description of each flag, plain language summary of the flag, possible causes, resource suggestions, and information needed to resolve any warnings.
- [Eva](#): This web-based tool is designed to help HMIS Leads and System Administrators assess the accuracy of their CoC's HMIS data and its completeness.

As new resources are released, they will be announced via the HUD Exchange listserv and posted on the HUD Exchange [LSA landing page](#). Important announcements regarding the LSA, including deadline reminders, will also be sent out via the listserv. If you are not already signed up to receive these announcements, you can join the listserv by following these steps:

1. Navigate to the following link in your browser: <https://icfi.us5.list-manage.com/subscribe?u=87d7c8afc03ba69ee70d865b9&id=f32b935a5f>
2. Fill out the textboxes on the form with your email address and zip code.
3. Check the boxes next to the topics for which you would like to receive email updates. Make sure to select the box next to "HMIS: Homeless Management Information Systems" to ensure you receive updates about the LSA.
4. Click on the gray button that reads "Subscribe" at the bottom of the form.

If you are already subscribed to the HUD Exchange listserv, but need to update your preferences, you can do so by following these steps:

1. Fill out the textbox for your email address and then click the gray button that reads "Subscribe to list" at the bottom of the form. You will see an error message indicating you are already subscribed to the HUD Exchange listserv.
2. Select "Click here to update your profile." You will receive an email to update your preferences.
3. In the email, click the "Update your preferences" link.
4. Select or unselect topics for which you would like to start or stop receiving email updates.
5. Click the "Update Profile" button.
6. Once you see the "Profile Updated" page that summarizes your newly updated subscription settings, the process is complete.