Eva - Quick Start Guide View Client Counts

Version 1.0 | February 2024

Overview

The purpose of this guide is to walk users through the View Client Counts page in **Eva**, which features the Clients Count Report. Specifically, this guide will walk you through:

- The purpose of the Client Counts Report
- How to navigate to the View Client Counts page
- Updating user inputs in the Client Counts Report
- Reviewing the Client Counts Report by project
- Reviewing the System-Wide Client Counts download

For more general information on **Eva**, and why you should use **Eva** to review your HMIS data quality and export file structure, please refer to the Eva Quick Start Guide. For more information on how to upload your HMIS data into **Eva**, please refer to the Eva Quick Start Guide- Upload HMIS Data.

The purpose of the Client Counts Report

The View Client Counts page in **Eva** features the Client Counts Report. The Client Counts Report identifies each client served in each project—not just Heads of Households (HoHs)—and their enrollment status at the time of the HMIS CSV export generation.

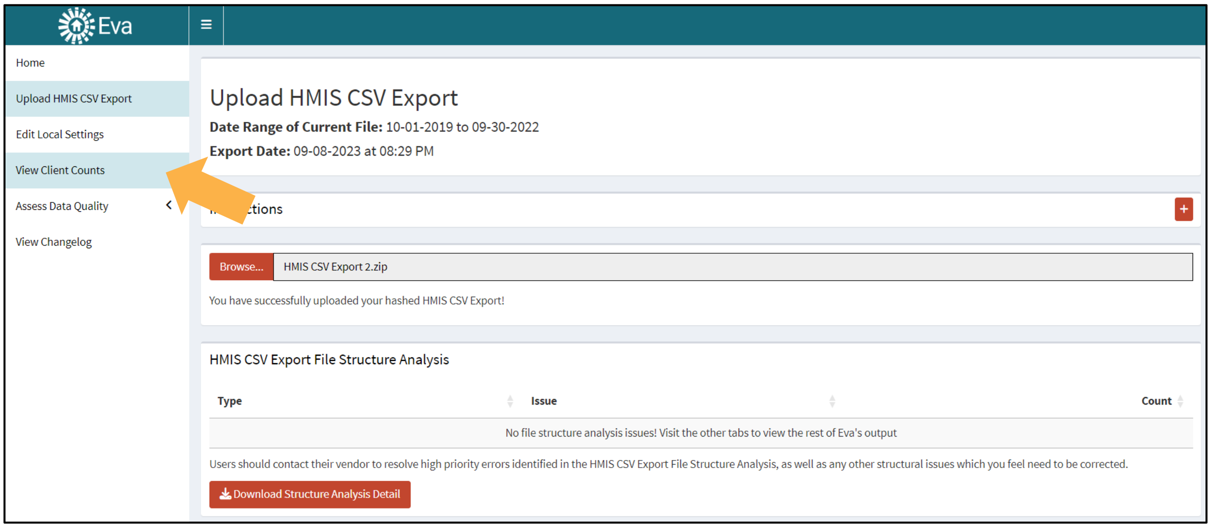
This report can be used to verify that a project is up to date on their HMIS data entry and that all expected clients are enrolled. Users should compare on-the-ground counts reported on the number of households/clients that are known to be served in each project with the client counts documented in their HMIS and uploaded to **Eva**. Users can use the client counts report to confirm that each client's enrollment status is correct and that the individual is not missing an exit date or move-in date (if applicable). It is important to double-check clients and households with older entry dates and confirm with the project that the long enrollment period is accurate or if they should have been exited.

One example of how communities can utilize the Client Counts Report in **Eva** is to isolate their HMIS data to the night of their Point-in-Time (PIT) count and see if the client counts listed in their HMIS for that night match what projects and organizations have reported to the CoC separately.

Navigating to the View Client Counts page

To use **Eva** and view the Client Counts Report, you will need a successful upload of a hashed HMIS CSV export file. Please note, if your upload has any file structure issues, it is important to download the Structure Analysis Detail and review any file structure errors with your HMIS vendor. For more information on how to upload your HMIS data and how to view the structural issues with your uploaded HMIS CSV export, please refer to the Eva Quick Start Guide- Upload HMIS Data.

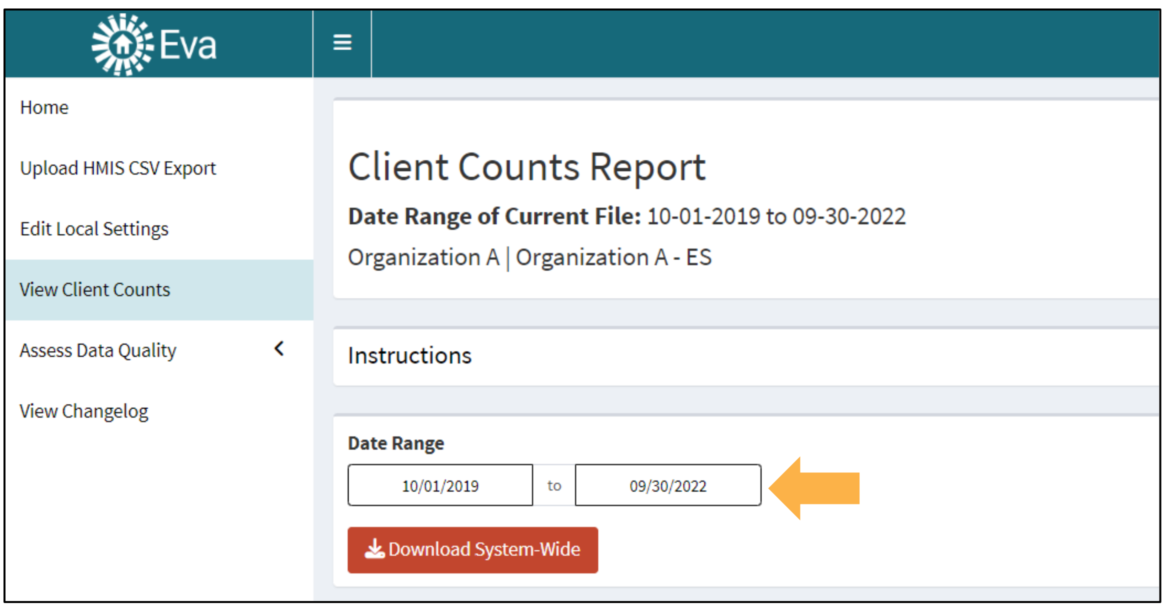
Once you have a successful upload, it's time to explore your data and check your data quality. Click on the "View Client Counts" menu option on the Navigation Menu. This will take you to the View Client Counts Page where you can access the Client Counts Report.



Updating user inputs in the Client Counts Report

Updating the Date Range

The Date Range fields—the Start Date and End Date—for the Client Counts Report default to the date range covered by your HMIS CSV export file. You will see the full date range of your current file in the Client Counts Report header. This information is pulled directly from your uploaded file.



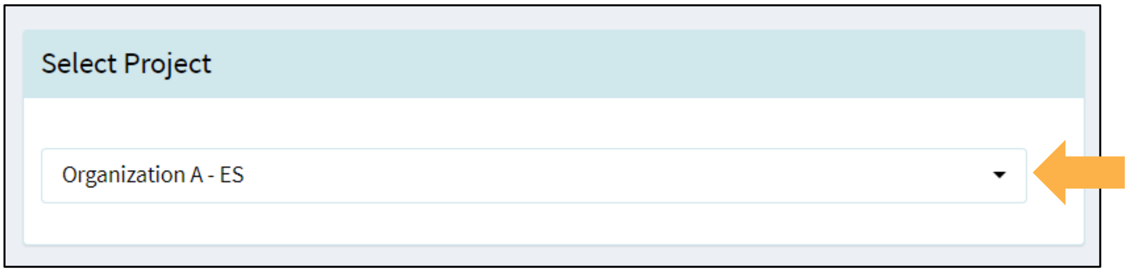
Adjusting the Date Range affects which clients **Eva** counts. This adjustment is useful if you want to look at metrics by month or quarter within your export data.

- If you set the start date in the left box to the export end date—meaning the start date and the end date match—then the report will show the status for all enrollments for your project as of the export end date.

Selecting a Project

While users can download the System-Wide Client Count Report, **Eva** also enables users to view the Client Counts Reports by project in the site. Users can select a specific project from the dropdown list in the Select Project box; **Eva** will then share the client count information for people enrolled in that selected project.

All projects listed in your export will appear in the dropdown list. Once you change the selected project, the Client Counts Report header will update to show the project you are currently looking at along with the organization that is associated with the project.

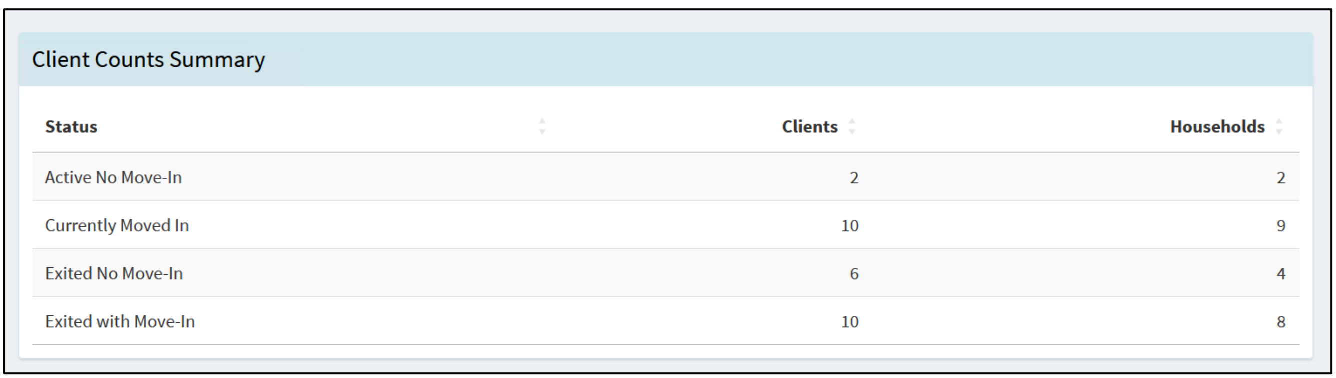


Reviewing the Client Counts Report by project

The Client Counts Report is broken down into two parts: (1) a summary total of enrollment statuses for the specified project, and (2) a detailed list of all served clients of the specified project within the Date Range.

Client Counts Summary Panel

The Client Counts Summary Panel provides a count of clients and households by their status within the selected project. *Please note, the screenshot below is an example Client Counts Summary Panel and does not include all possible enrollment statuses.*



Client Counts Summary

Status	Clients	Households
Active No Move-In	2	2
Currently Moved In	10	9
Exited No Move-In	6	4
Exited with Move-In	10	8

The table below defines each status, along with its project types.

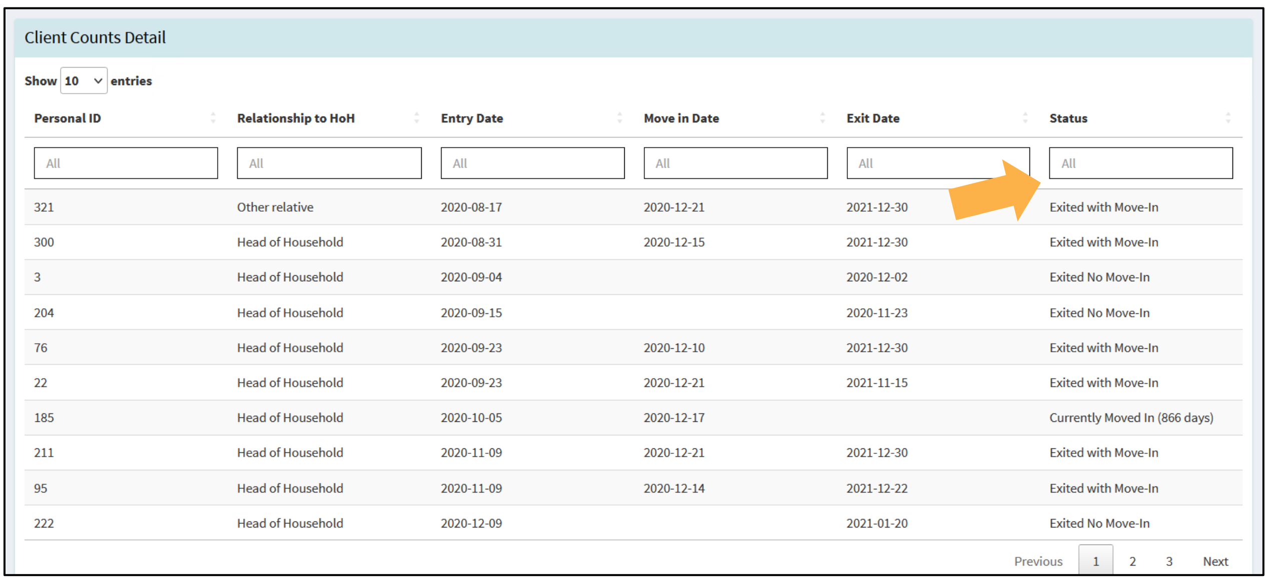
Status	What This Means	Project Types
Active no move-in	The client/household is currently enrolled in the project but has not yet moved into permanent housing.	Statuses apply specifically to permanent housing (PH) project types: • Rapid Re-Housing (RRH) • Permanent Supportive Housing (PSH) • Permanent Housing with Services (PH-Housing with Services) Permanent Housing without Services (PH-Housing Only)
Currently moved in	The client/household is enrolled in the project and has moved into permanent housing, indicated by a Move-In Date.	
Exited no move-in	The client/household has exited the project without moving into permanent housing.	
Exited with move-in	The client/household has exited the project and has moved into permanent housing, indicated by a Move-In Date.	

Status	What This Means	Project Types
Currently in project	The client/household is currently enrolled in the project. This counts all active clients/households, including those in permanent housing projects with or without a Move-In Date (i.e. clients in PH projects that have the status "Active no move-in" and "Currently moved in").	Statuses include all PH project types as well as: • Emergency Shelter (ES) • Transitional Housing (TH) • Homelessness Prevention (HP) • Street Outreach (SO) • Safe Haven (SH) • Day Shelter (DS) • Supportive Services Only (SSO) • Coordinated Entry (CE) • Other
Exited project	The client/household has exited the project. This counts all exited clients/households, including those in permanent housing projects with or without a Move-In Date (i.e. clients in PH projects that have the status "Exited no move-in" and "Exited with move-in").	

Client Counts Detail Panel

For each client served by the selected project within the date range selected, the Client Counts Detail Panel shows client's Personal ID, Relationship to HoH, Entry Date, Move-In Date, Exit Date, and Status.

All columns are searchable. **Eva** will filter as you type in the Status box.



Client Counts Detail

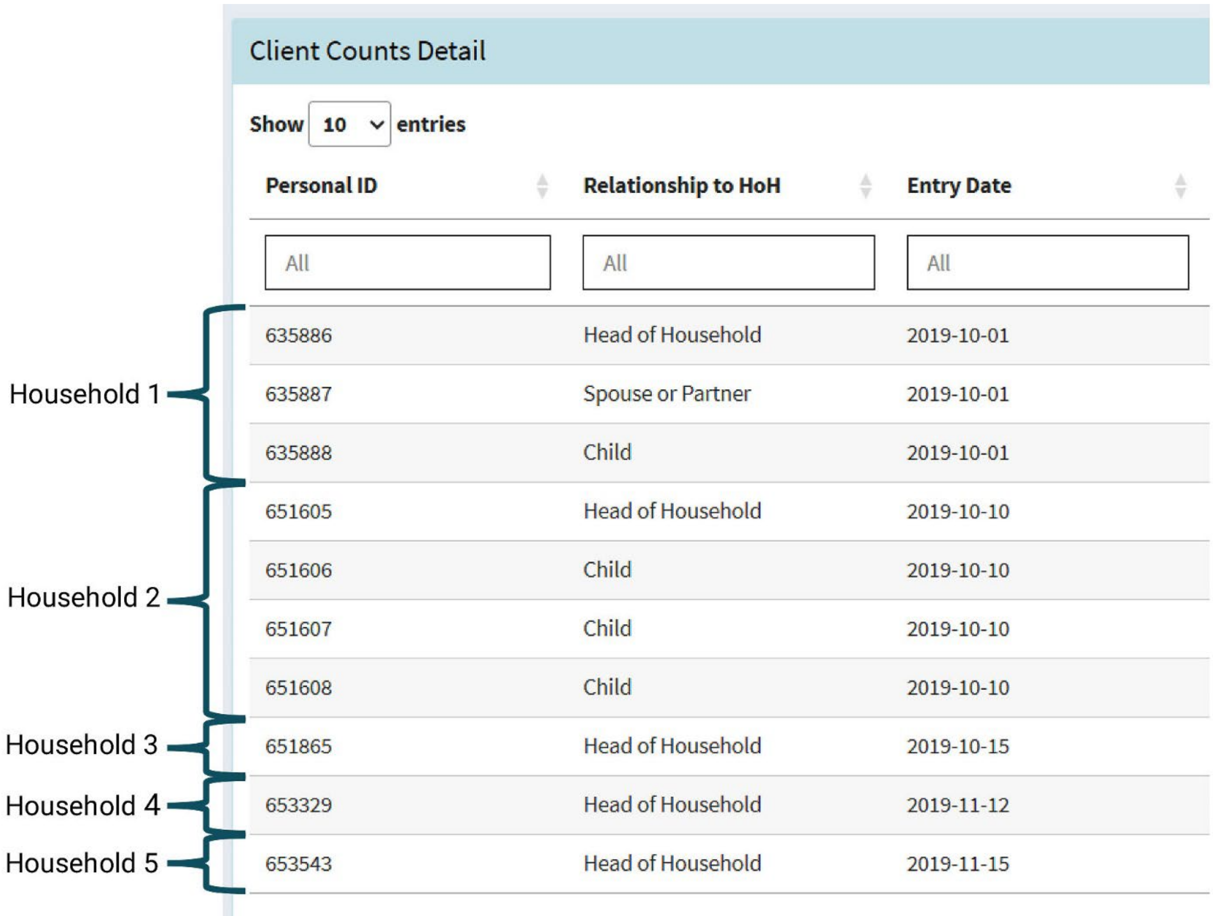
Show 10 entries

Personal ID	Relationship to HoH	Entry Date	Move in Date	Exit Date	Status
All	All	All	All	All	All
321	Other relative	2020-08-17	2020-12-21	2021-12-30	Exited with Move-In
300	Head of Household	2020-08-31	2020-12-15	2021-12-30	Exited with Move-In
3	Head of Household	2020-09-04		2020-12-02	Exited No Move-In
204	Head of Household	2020-09-15		2020-11-23	Exited No Move-In
76	Head of Household	2020-09-23	2020-12-10	2021-12-30	Exited with Move-In
22	Head of Household	2020-09-23	2020-12-21	2021-11-15	Exited with Move-In
185	Head of Household	2020-10-05	2020-12-17		Currently Moved In (866 days)
211	Head of Household	2020-11-09	2020-12-21	2021-12-30	Exited with Move-In
95	Head of Household	2020-11-09	2020-12-14	2021-12-22	Exited with Move-In
222	Head of Household	2020-12-09		2021-01-20	Exited No Move-In

Previous 1 2 3 Next

The rows are ordered by Entry Date (oldest on top), then Household ID (not visible in the Client Counts Detail Panel), and then Personal ID. This enables you to see clients grouped by their household and the oldest household enrollments first.

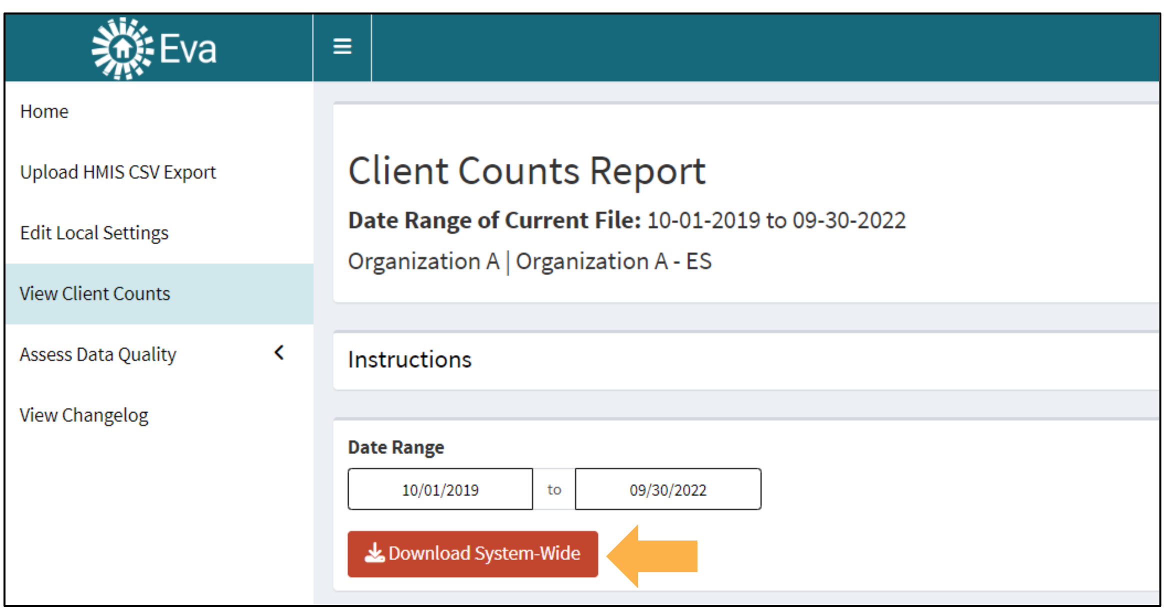
See the screenshot below for an example of how to interpret the household groupings in the Client Counts Detail Panel.



Reviewing the System-Wide Client Counts download

Download the System-Wide Client Counts Report

Users can also download an Excel file of the Client Counts Report for all projects system-wide. To download client count data for all projects in your HMIS CSV export file, click the red-orange “Download System-Wide” button.



Understanding the System-Wide Client Counts Report

The Excel download contains three tabs. The “Validation - Current” tab is limited to those currently enrolled in each project as of the Export End Date and displays how many clients are still active in each project. For housing projects specifically, you will also see counts of clients that do and do not have move-in dates.

The “Validation - Date Range” tab has the same information found on the “Validation - Current” tab, but also includes counts of clients who exited during the reporting period set in the Date Range inputs shown above. You will see counts of clients who have exited each project and, for housing projects specifically, how many of those exits did or did not have a move-in date. Both tabs contain aggregate data only, meaning there are no Personal IDs for clients displayed.

Finally, the “Validation - Detail” tab contains each client’s Personal ID, Relationship to HOH, Entry Date, Move-In Date (if applicable), Exit Date (if applicable), and Status in the project as of the Export End Date.

Additional resources and providing feedback

- Additional resources can be found on the Eva page of the HUD Exchange.
- For more general information on **Eva**, and why you should use **Eva** to review your HMIS data quality, please refer to the Eva Quick Start Guide.
- For more information on how to upload your HMIS data to **Eva**, please refer to the Eva Quick Start Guide- Upload HMIS Data.
- For more information on **Eva** and its code, including a list of all data quality checks, visit the Code tab on the Abt Eva GitHub.
- To provide feedback or report issues regarding **Eva**, visit the Issue tab on the Abt Eva GitHub. To add a new issue, click the "New issue" button on the right-hand side of the page.