HMIS Lead and System Administrator Webinar 8/16/2023

JESSE JORSTAD: All right, let me go ahead and get us started. Welcome to the HMIS Lead webinar on the 16th day of August, 2023. We're glad you're here.

JESSE JORSTAD: I want to make sure that everybody's aware that you can turn on closed captioning for this presentation, this webinar. In order to do that, you can click on the closed caption button, it's in the lower left-hand side of your screen, and then click that small arrow beside that icon and you can select your preferred caption language. So go ahead and turn that on if that would be helpful to you.

JESSE JORSTAD: A few webinar reminders, during and after the webinar today. So, you are muted, all participants are muted. If you have questions for us, you can use the Q and A feature of Webex. It's helpful if you can include the slide numbers that you're referring to, because oftentimes by the time we get to your question, the presentation has moved on and we need to refer back to what you were looking at.

JESSE JORSTAD: There are other times where we will ask you to submit an AAQ, which is Ask A Question, so we'll provide that link to you. That's just to make sure that we're able to give you a thorough answer and take into account all of the nuances that might be a part of your question.

JESSE JORSTAD: You can access all the materials for today's webinar and webinars of the past and webinars of the future on the HUD Exchange. You can also manage your subscription to the HMIS Lead listserv and find links to other HMIS information and submit your on AAQs that same website. As we go along, Sam is going to drop in some links into the chat for you all, such as that to the HUD exchange.

JESSE JORSTAD: I want to make sure that everybody should be here, wants to be here, that this is gonna be useful for you. So, the kinds of things that we use these calls for are to inform HMIS Leads and System Administrators of upcoming HMIS events, information, and changes to guidance. We provide broad overviews of HMIS guidance and foundational knowledge.

JESSE JORSTAD: It's a forum for your questions, and it's also to remind CoCs and HMIS admins and Leads about upcoming reporting deadlines and reporting requirements using HMIS and other data sources. We also provide leadership to HMIS Leads and system admins for implementation success. So, if that sounds like your cup of tea, go ahead and stick around with us for the next 85 minutes.

JESSE JORSTAD: We received some feedback around how we've been doing Q and A, so we wanted to do a few changes, a few tweaks to how we do things. We do our best to answer all the questions that we receive during the call. If you've asked a question that wasn't answered we will be staying on the call in our practice room session, continuing to type out answers to those questions. And so, if you want to be able to see your answer, you can stay on or leave the webinar open, and you'll be able to see that.

JESSE JORSTAD: Sometimes it won't be feasible for us to get through all of the questions just because of the volume. If we know that we can't answer you immediately following the call, we will ask you to submit your question via AAQ.

JESSE JORSTAD: The other change that we're going to implement is that when we are answering questions verbally, rather than just using...there's kind of like an auto text that is available in Webex that just says "This question was answered verbally". We're not gonna be doing that anymore. We will summarize what the verbal answer was that was given. And so hopefully that will help everybody out.

JESSE JORSTAD: Let's talk about who's on the call today. We have Fran Ledger from the SNAPS office, they/them. Meradith Alspaugh from the Partnership Center, she/her. Ryan Burger from ICF, he/him. Sam Kameyama from Abt Associates, she/her. Melissa Stevenson from Abt Associates, she/her. And then subbing in for Stacey is Max Burns today with Cloudburst, he/him. And then Kayla Thompson from Abt Associates, she/her, is on with us today to provide some technical support.

JESSE JORSTAD: Here's our agenda for today, we'll start up with announcements and reminders regarding reporting timelines. Talk about fall NHSDC. There is new guidance that has been released for a Special Project under the NOFOs. We also want to let you all know that there are new charts and a new guide available for Stella P. And then I'll preview some updates that are coming to Stella M in the next few weeks here.

JESSE JORSTAD: We'll then get into deeper dive content. So, regarding the fiscal year '24 data standards, we'll talk about programming guidance, review of materials, and then the project setup tool has been updated and we'll do a demo of that.

JESSE JORSTAD: Then we're going to do a brief introduction to the LSA. I don't know if any of you are starting to see leaves change color yet, but we are seeing that a bit here in Washington state. And that always tells me that we're about to get into the LSA. But to help you in preparing with the LSA we wanted to do a demo of Eva and talk about specifically how you can use that newer tool, it was released just last December, to help you prepare for the LSA.

JESSE JORSTAD: I'm pretty excited about this agenda. Let's go ahead and kick it over to Fran for some reporting timelines.

FRAN LEDGER: Hello everyone, I'm very happy that you're here with us. I appreciate all the hard work that you do. Thank you for joining us every month and if you're new, welcome.

FRAN LEDGER: Here's the reporting timeline. We post this every month. Our dates change from time to time, but it's the same set of reports. So, you can always come back to the slide deck, it's posted online, and take a look at these dates to see when the latest reporting time frames are. We won't read them all out. Go ahead and switch to the next one.

FRAN LEDGER: I do want to talk about NHSDC's Fall Conference. That will be coming up October 23rd through the 25th. HUD will be doing two institutes during this conference, one on HMIS Fundamentals and System Modeling/Stella M for Facilitators.

FRAN LEDGER: And then we'll have a wide range of sessions for folks in case you're not able to get into the Institutes, which the seats are limited in the Institutes. There'll be some fundamentals sessions in the regular session time along with some system performance sessions in those regular session times. And also, you're going to have an opportunity to hear from your peers. There's a lot of great community sessions that happen.

FRAN LEDGER: And HUD resources are available to use to pay for registration. So HMIS funds under CoC's and ESG's grants can be used for attending this conference. It's approved for those HMIS funds, but your planning grants cannot be used so just be aware of that. And thank you.

JESSE JORSTAD: Thank you, Fran. Let's hand it over to Ryan.

RYAN BURGER: Thank you, Jesse, Thank you, Fran. Good afternoon and good morning, everybody, it's great to see you. This is Ryan from ICF. Just wanted to talk real briefly about the Special NOFO HMIS Project Setup Guidance.

RYAN BURGER: This is a quick resource that was released just about 2 weeks ago, towards the end of July. So, again just want to congratulate all of the awardees on this call. And then just, again, to thank everybody and appreciate all the hard work that everybody did by way of developing coordinated community plans and submitting your applications for the Special NOFO projects both in the unsheltered and the rural spaces.

RYAN BURGER: So, just real briefly, wanted to make sure everybody was aware of this document. Again, it's a quick resource, it's available on the HUD Exchange, and it's really meant to support the project setup and the data collection and reporting efforts of recipients that are going to be funded by the Special NOFO, including information on the HMIS project setup and data collection guidance.

RYAN BURGER: Again, lots of the typical CoC project components being supported with this funding as well as some specific activities related to things like short-term emergency lodging. So, excited to see the projects that communities put together and fund to help address unsheltered and rural homelessness.

RYAN BURGER: You, as HMIS Leads and system administrators, one of the things that hopefully you're doing now if you are serving a community that has been funded with these dollars, is to really be working with your CoC to identify any of the projects within your HMIS implementation that have been awarded this funding. Help make sure that you're documenting the project component, correlating everything with the grant agreement, making sure that everything is set up as it has been intended.

RYAN BURGER: Also wanted to remind folks that there are these specific funding sources for FY2024, so, specific funding sources for the unsheltered Special NOFO and rural Special NOFO.

RYAN BURGER: Other than that, just flagging the upcoming reports. We will be reporting on these project activities and performance on a quarterly basis, with an annual APR being uploaded at the end of the year...at the end of the operating year, rather. So, those QPRs and APRs being uploaded to Sage.

RYAN BURGER: Other than that, as you are working with your communities, just making sure that you are keeping in close contact with your CoC leadership. As questions may arise, please feel free to submit AAQs. And again, more than anything, spend some time with this guidance to make sure that you're setting your projects up as intended.

RYAN BURGER: I think with that, I'll pass things over to Melissa.

MELISSA STEVENSON: Thanks Ryan. Hi everyone, my name is Melissa, I'm with Abt Associates. I am going to talk real quick about some new charts that we have in Stella P.

MELISSA STEVENSON: We have new race and ethnicity charts, I think they went live within the last couple weeks so, hopefully some of you have had a chance to look at them. We're pretty excited about them. They are in the Demographics section of Stella P, under both the Overview and the Comparison tabs.

MELISSA STEVENSON: So, previously, on the Overview tab, you would have seen one chart showing race and ethnicity. We now have a suite of charts. We believe, and we really hope, that this better represents how people actually identify as well as it should be able to provide more information to communities that you can use to improve your systems and address inequities in the systems. So, we're very excited about that

MELISSA STEVENSON: We also have an updated Race and Ethnicity Analysis Guide; I think it's version 3.0. That link is there, and I think Sam just posted it in the chat, thanks, Sam. So, that'll go into it in more detail.

MELISSA STEVENSON: And also, if you're in Stella P, there is a little "i" above the charts and that'll give you more information on what those charts are showing, what they represent, if you're not sure what exactly they're doing now.

MELISSA STEVENSON: And just a reminder, though, that in the FY24 data standards, there will be some updates to these fields and those will be incorporated into these charts in the next fiscal year.

MELISSA STEVENSON: So, that's all for Stella P, I'll turn it back to Jesse.

JESSE JORSTAD: Thank you, Melissa. I don't know if you noticed, but there were quite a few affirming emojis that were floating up while you were talking. So, people are pretty excited about these charts. So, thanks for all your hard work on that.

JESSE JORSTAD: Okay, let's talk about Stella M. So, Stella M is the system modeling tool that was released the July before last and communities have been getting in there and interacting with it and learning a lot about what they could be doing to be reducing homelessness in their communities.

JESSE JORSTAD: The current central question to the system model is what proportion of the universe need each pathway. So, what we're talking about is if you think...and in this scenario that there's going to be 1743 people who are experiencing homelessness for the period that you're modeling.

JESSE JORSTAD: Then you think that 10% of them are going to need...this is HP only so that is prevention. This is just a random example. This isn't guidance, “that's how you should build your system”. This is just to show this change that we're making. And so, you'll notice that in this scenario, the number of households that go unserved is that 50% on the bottom times that 1743 gets you to 872.

JESSE JORSTAD: Communities we're struggling with this question because you have to know quite a bit about your unserved population in order to make these estimates and so we've decided to break this out a little bit more.

JESSE JORSTAD: So now, what we're going to do is we're going to say, how many households do you think you can serve? So again, you'll see the 1743 on this left-hand side. And then on the right-hand side you're inputting how many you think you can serve, so, in this case, 871, which means that 872 will be the portion unserved.

JESSE JORSTAD: And you'll notice that now the percentages are of that smaller number of the 871. And so you can estimate of the people we're gonna serve, 20% of them are going to need this 1st pathway, which happens to HP only.

JESSE JORSTAD: We've gotten some really great feedback from communities that that's how the conversations are taking place. And then when they go to actually enter into Stella, it's been a little bit hard to translate the math. So, I think this is gonna make it a little bit easier to talk about it and to think about it and all that stuff.

JESSE JORSTAD: Now, this is a change to how the calculations work, in terms of when the rounding happens and what not. So, just want to make sure everybody knows that it is possible that if you've already built a model, you could see a change in the inventory results, which is how many units you need of a specific intervention; they could change by 1 unit.

JESSE JORSTAD: So, if that is really important to you we would recommend that if you've already built models in Stella M and they've been communicated publicly and maybe you published some report that says you need 500 units of Permanent Supportive Housing, or whatever the intervention is, right? We recommend that you export the results off of the results page so, that way you can identify if any of the numbers have changed once this goes live.

JESSE JORSTAD: We are a couple weeks out from making the change, but we do recommend that you generate that export before August 18th to make sure that you've got that handy for when the change does come through.

JESSE JORSTAD: Okay, let's go ahead and head into the deep dives into content. Meradith.

MERADITH ALSPAUGH: Thanks, Jesse. Hi, everyone. Let me make myself the presenter here.

MERADITH ALSPAUGH: Okay, so this slide looks familiar, I'm sure. But we keep moving our little star ever so slowly through each month. So, we're in August, you have the data standards, you have the materials, your vendors have programming specs, lots of things happening out in the world.

MERADITH ALSPAUGH: Hopefully, you are communicating with your agencies, with the CoC partners in your community, preparing folks for changes and preparing for data collection changes and reporting changes as we all know, right, demographic information is changing. So, that's probably going to touch a lot of your other reports that you may have built out in your system. So, just being prepared for all of those different pieces coming soon.

MERADITH ALSPAUGH: I think, also communicating with your vendors. We've talked to the vendors a lot about trying to have a sandbox site available at the beginning of September, or in September at some point for you all. So, we would encourage you to be working with your vendors on figuring that out and the timing of that and access to that, et cetera, working towards our October 1st go-live date.

MERADITH ALSPAUGH: Wanted to talk a little bit, since we last were on this call, we released a whole suite of updates to the resources, right? So, we talked last time about the changes for coordinated entry, rolling back the 4.21 change, re-instituting the 4.19 Coordinated Entry Assessment and 4.20 Coordinated Entry Event data elements.

MERADITH ALSPAUGH: So, there were lots of places that required updates and we've made all of those updates. There was a listserv that went out on July 28th but if you go to the main data standards landing page, thank you, Sam, for posting that there, you'll see all of those updated documents.

MERADITH ALSPAUGH: Just a couple points I wanted to make about documentation when we make updates, because we got a few questions about it in the AAQ. Anytime we make updates to our documents, there's a revision history at the beginning of every one of our documents, right? So, in the dictionary and the manual and the programming specs, all of those documents have a revision history.

MERADITH ALSPAUGH: In general, we try to link to where the change is. We know that it can sometimes be really hard, especially in some of our more technical documents, to find that one specific thing. So, I wanted to just call that to folks' attention. That it is in there.

MERADITH ALSPAUGH: It's easy to skip over, but it is in there and we encourage you to scroll all the way to the bottom, right? Because it is in an order, it is going from oldest to newest. So, you may see something in the April release of the data standards that has since changed.

MERADITH ALSPAUGH: So, Coordinated Entry is a good example. We initially said there was a new data element, but now there's not. So, you have to scroll all the way to the bottom to see those changes. Again, just wanted to put that plug out there so that folks understood how that process works.

MERADITH ALSPAUGH: Again, sometimes we have little changes, sometimes there are big changes. Usually if it's a big change we're going to let everyone know, we'll do a listserv, we'll talk about it here. Sometimes there may just be a minor off-cycle update that needs to be made. May not send out an announcement about it, but it will be tracked in the revision history for sure. I just wanted to hit on that for you.

MERADITH ALSPAUGH: I wanted to also talk a little bit about... do we have the name of that document? It is such a long title, and I don't know why we kept it such a long title, but the Data Collection for the Transition to the FY2024 Data Standards, Back Data Entry is the name I call that document, where we provide guidance on what needs to be updated or added or changed on October 1st.

MERADITH ALSPAUGH: We recognize that what we had in there for Coordinated Entry Participation Status wasn't quite sufficient. What we had previously was that all active projects on 10/1 needed to have that field or that record updated.

MERADITH ALSPAUGH: So, what we realize though, is it's a little more nuanced than that. It's not just those projects that are active on 10/1, it's really going to be any projects that were active in the most recent report period for any Coordinated Entry grants in that CoC.

MERADITH ALSPAUGH: So, we are using the 2.09 Coordinated Entry Participation Status in the CE APR. So, we want to have that completed on any projects that would be included in the universe of projects for that APR. So, we'll talk about an example there moving forward, but I just wanted to put that out there.

MERADITH ALSPAUGH: Also had some questions about what the dates should be if the dates of participation are unknown. So, if the CE participation Status Start Date is unknown, but generally you know that it started participating in Coordinated Entry before October 1st of 2020 and it hasn't changed, just use October 1st of 2020 as the Participation Start Date. I'm going to get those words down in just a minute (laughs).

MERADITH ALSPAUGH: 10/1/2020 was the date that the CE data elements were required to start being collected in HMIS so that's the date we're going for…(loses audio).

JESSE JORSTAD: Did other people just lose audio from Meradith?

MERADITH ALSPAUGH: (Regains audio)...thumbs up but I don't know what that means, they're agreeing with you or me.

JESSE JORSTAD: Oh, well, now I can hear you so that's the important thing.

MERADITH ALSPAUGH: Max said muted on my end.

JESSE JORSTAD: Okay. Well, we're back, go ahead.

MERADITH ALSPAUGH: Hold on audio is back, but it's out.

MAX BURNS: No, we can hear you, Meradith.

JESSE JORSTAD: Yeah.

MERADITH ALSPAUGH: Okay. Well, I don't know what you missed, but...

JESSE JORSTAD: It was maybe 10 seconds.

MERADITH ALSPAUGH: Okay, well, I'm just going to keep talking here.

MERADITH ALSPAUGH: So, if the Participation Status Start Date is unknown but you know the project started after 10/1 of 2020, just set the Participation Status Start Date, equal to the project's Operating Start Date. And again, this will be updated in the guidance that is released probably tomorrow, if it's not out there already. But that will be released.

MERADITH ALSPAUGH: So, I just wanted to run through a real quick example when you're looking on October 1st at which projects need to be updated. So, imagining a scenario where you've got a CE APR report period that is December 1st of 2022 through November 30th of 2023.

MERADITH ALSPAUGH: Let's say you've got these 3 projects: A, B, and C, you're going to want to make sure that you have the records that reflect this information.

MERADITH ALSPAUGH: So, Project A is a Coordinated Entry Access Point, what the services are they're providing, if they're receiving referrals, and the Start Date of this particular status, the status being these things here. You can't see my mouse but imagine me circling those 3 things there.

MERADITH ALSPAUGH: Project B, it's an access point, again, not receiving referrals, has specific assessment activities, setting its Start Date at 4/1/2023. And these are for projects that are just continuing to operate, so they're still active on October 1st. Again, if you didn't know when Project A actually started, but they've just been doing it forever, just put 10/1/2020 on there.

MERADITH ALSPAUGH: Now then when you look at Project C on 10/1 of 2023, that project isn't actually active, but you still need to go back in and complete these records. So, you need to go back in and indicate what their status was, like that they were participating as a CE Access Point as of January 1st of 2022, imagining that's when they were doing these assessments.

MERADITH ALSPAUGH: They stopped doing the assessments on 4/30 of 2023. And then you would indicate that they stopped doing this, that status became active on 5/1, and then you would just leave the record as it is. That way again, when that CE APR is generated for that time period it's going to accurately reflect the status of Project C.

MERADITH ALSPAUGH: Okay, let's talk about the Project Set Up Tool. We've had a few questions come in the AAQs about this, so we just want to talk about it. We'll do a little demo here in a second too. Before we get into it, though, I just do want to put out a couple quick reminders.

MERADITH ALSPAUGH: Project Type is determined by the funder program, and component. So, it's important when you are setting up projects that the very first thing you're doing is looking at what was this project funded as? So, look at if it's a CoC grant, what was it applied for as. If it was applied for as a Rapid Rehousing project, then it is a Rapid Rehousing project. Look to your grant agreement. What is your grant agreement for?

MERADITH ALSPAUGH: So, the Project Set Up Tool is not going to tell you what type of project you should be setting up per se. It will tell you the information that is required to be collected for that particular project type. But look to your grant agreements and look to your funder program and component for your specific project type.

MERADITH ALSPAUGH: Also, just clarifying that the Project Set Up Tool is a general guide for setting up projects. It's not going to be able to account for every specific variable that may be in play for your projects.

MERADITH ALSPAUGH: So, one thing I think about, and getting into the 3rd bullet there, different funder requirements related to eligible clients and activities have to be considered when thinking about combining projects. So, there may be a circumstance where the Project Set Up Tool says these are both Prevention projects, you can put those together.

MERADITH ALSPAUGH: But if you have an SSVF Prevention and just maybe an ESG Prevention project, if that ESG Prevention project isn't serving veterans, probably doesn't make sense to put those projects together, right? Because you need to be able to report on the project and all the people served to both of the funders.

MERADITH ALSPAUGH: So, again, you may have special functionality. You may have some other things set up in your software that is vendor specific. And if you do, and you can combine projects together that otherwise don't appear like they would be appropriate to go together, you can do that. We would encourage you to talk to your vendor about it and make sure that it's actually working the way you think it is.

MERADITH ALSPAUGH: But again, just keeping in mind all of these little caveats, right? It's not a perfect tool. It's not going to answer exactly precisely every single question that every single person has about Project Setup. But hopefully, we'll get you started in the right direction for some of the more simple cases. And, of course, submit an AAQ if you have questions.

MERADITH ALSPAUGH: So, let me share my screen here. So, we changed the tool a little bit. It is no longer an Excel-based tool. It is now a tool that lives on the HUD Exchange, and it is integrated into the HUD Exchange site. But it works basically the same.

MERADITH ALSPAUGH: So, you're going to select your federal program and component. You're going to select another program and component. If they are obviously things that do not go together, you will receive the alert before you can even proceed with seeing any response options indicating that they are inconsistent project types.

MERADITH ALSPAUGH: You can reset it. You can pick something else, so, HOPWA Transitional Housing and CoC Transitional Housing, and then you can show the required elements. It's going to tell you a little bit up here about what your funding sources were that you selected, what your project type is.

MERADITH ALSPAUGH: And then we're going to show you the different data elements that are required by each of those funders. So, we're indicating if they're required, we're indicating if they're optional.

MERADITH ALSPAUGH: And then, anytime we've got Coordinated Entry elements, we are just using the CES, the shorthand. It's going to be applicable however your community has set up Coordinated Entry, right? So, you may have Coordinated Entry being collected in Shelters and in Street Outreach, or only in CE projects. It's going to really depend on your community, but we just wanted to flag it in case it was something that was relevant to you so that you knew that it fit there.

MERADITH ALSPAUGH: So, again, much like the old Excel version of the tool, it's going to tell you all the different program specific and federal partner and common data elements that are required to be collected by that particular funder for that particular project type.

MERADITH ALSPAUGH: So, we're hoping it's just a little simpler to use. Again, it's not particularly different than the old version, but it is no longer in Excel because we know that the macros was causing people problems. And so, this hopefully is just a little easier to access.

MERADITH ALSPAUGH: One other thing I did want to point out, you'll see in here...YHDP is a good example. If you think about how the funding sources are listed in the data standards, there is only one program for YHDP, right, we have HUD: CoC YHDP program.

MERADITH ALSPAUGH: But in the tool, similar to how we've done it in the past, and we've done this with SSVF, and we've done it with YHDP, we do pull them apart into the different eligible components under that program, just to make it a little easier. So, when you pick Permanent Supportive Housing, you can actually see something here.

MERADITH ALSPAUGH: So, I am saying that because I don't want you to think, well, the dictionary doesn't say that there's a YHDP PSH funding component, and we know that and that's okay. The funding component is still gonna be YHDP, it's just gonna be set up in a PSH project if that's what it was funded to operate.

MERADITH ALSPAUGH: So, again, you're going to have your reset choices here if you pick things. Go back here. Hopefully it's pretty simple to use, and that's that.

MERADITH ALSPAUGH: And I think that is it for me, but I'm going to pause. I did see some questions coming in. I don't know if there's any you want me to take on verbally or I know we've got a lot of content.

JESSE JORSTAD: Yeah, I think just this one for slide 18, which was back to the CE Participation Status. This field only needs to be filled in if the CE project is funded by a CE grant, is that correct?

MERADITH ALSPAUGH: No, this is being collected on all projects in your HMIS to determine what their role, if any, is in Coordinated Entry. If they're not doing anything related to Coordinated Entry, just mark no.

JESSE JORSTAD: So, that would mean if they're taking referrals or if they're doing assessments, there should be an affirmative response there, otherwise negative. Okay, that sounds good.

JESSE JORSTAD: Max, was there anything else that floated to the top for you that you wanted to have Meradith address now?

MAX BURNS: I think there's been multiple AAQs recently about multi-CoC CE systems. There's a question assigned to you, Meradith, about this.

MERADITH ALSPAUGH: I need to take a second to read that one, why I didn't respond to it immediately.

JESSE JORSTAD: That makes sense. Yeah, those can be kind of complex. So, if there's something about that, Meradith, that you do want to share with us you can just let us know and we'll take a little break for you. Okay.

MERADITH ALSPAUGH: And then I'm going to switch it for Ryan.

RYAN BURGER: Thank you, Meradith. Okay, so, just real quick, I had one more slide. Wanted to talk about upcoming postings. Did see a couple of Q and A's come in here in the course of the chat as well. So, just giving everybody a quick update in terms of where these critical HMIS reporting documents are. Most of these we have probably covered here in the past couple of months, or the past couple of meetings here, in this space. So, just revisiting pretty quickly.

RYAN BURGER: The System Performance Measures, those have been with vendors for a little while. Overall, some pretty minor updates. Generally, the changes to this report are really just meant to conform with our FY24 data standards changes. There's been a couple of other clarifications in terms of look back period...look back stop date rather. But for the most part, the same System Performance Measure report, we've all come to know and love.

RYAN BURGER: The SSO: CE APR, this was in the works for some pretty substantial changes. Of course, with the rollback of 4.21 and the re-introduction of 4.19 and 4.20, the specifications for the SSO: CE-APR are pretty much the same just with one important caveat.

RYAN BURGER: Again, we've just talked about the role of 2.09. Previously, this report was scanning for data all across your system. The assumption was that if there was data associated with the report at the project level, that that was kind of how the projects were set up to contribute data.

RYAN BURGER: HUD is going to be relying solely on 2.09, the CE Participation PDDE to determine the project universe. So, just making sure that, again, an inventorying process, making sure that you have full awareness of which projects are participating in your local CE system to help populate this report. So, those specs are in the final phases of development and should be on the Exchange here very soon.

RYAN BURGER: Last month at the July call, again, we spent some more time in a deep dive way walking through the changes to the CoC APR and the ESG CAPER. Again, several population specific questions removed, some new equity-based questions being introduced.

RYAN BURGER: Again, not going to downplay the significant, the substantial changes to this report. But I think in most instances where there is a new question that's been introduced in the equity space, or tracking housing subsidy types for destinations, tried to reuse some of the same reporting logic to just lessen that burden for you locally if you have custom reports that rely on that and, of course, for HMIS software providers. So, wrapping up those programming specifications and then the final phases of formatting and design.

RYAN BURGER: And then, of course, the HMIS Glossary, a pretty important document, been working through this for the last couple of months. Again, in the final phases of design and formatting and 508 compliance. Several updates, tried to clarify things where we could.

RYAN BURGER: One thing I'm really excited about is the inclusion of a crosswalk of federal reports and glossary references, right? So, if we're calculating age or using different gender reporting categories, trying to attach them more closely to any of the reports that we are submitting to HUD, whether that's the APR, SPMs, LSA or even for federal partners, right?

RYAN BURGER: So, the PATH annual report as an example. So, just trying to clarify if we're talking about active client method two, we'll expect to see it on the APR, the CSV specs and the PATH annual report, for instance. If we're talking about gender, that's only ever showing up on your APR and CAPER.

RYAN BURGER: They're just trying to clarify through that crosswalk a little bit more what is being used by way of glossary reference and which report specifically we're tying it back to, to give you a little bit more information. So, other than that was hoping to have these available for your review.

RYAN BURGER: Again, we're just about maybe a week away until all of those documents are in the final formatting and design and in a place to be posted to the HUD Exchange. We mentioned it earlier, Fran and Meredith both, a pretty substantial release of information, expect a listserv to go out to support awareness and make sure everybody is working from those documents as needed.

RYAN BURGER: Pause for a minute...I don't think I'm seeing any questions come in. Jesse, Max, help me out before I pass it on to Melissa.

JESSE JORSTAD: No, I think you're good, Ryan.

RYAN BURGER: Super. All right, I'll go ahead and turn things back over to Melissa.

MELISSA STEVENSON: Thanks. So, as Jesse alluded to at the beginning of the call, we are approaching LSA season, so welcome, everyone. I'm going to do a quick introduction. Well, maybe not that quick, but I'm going to do a short introduction to the Longitudinal System Analysis or the LSA.

MELISSA STEVENSON: A lot of what I'm going to talk about are probably things that a lot of you know already. I'm sure many of you have been around and been through a few LSA cycles. So, some of this is geared more towards our new folks who are just joining us, welcome.

MELISSA STEVENSON: So, first, what is the LSA. So, we start with, obviously, our data in HMIS, Homeless Management Information System. Hopefully we all, everyone on the call, knows that here. But we take that data from HMIS, and it gets pulled into the LSA, which is a report looking at everything that happened in the homelessness system in certain project types, which we'll look at in a couple slides, over the course of the federal fiscal year, so, it's annualized.

MELISSA STEVENSON: Although, as you can see on this slide, that annual fiscal year report turns into the official submission to HUD that every CoC does once a year. And that feeds into the Annual Homeless Assessment Report, the AHAR, that is, Part 2 of the AHAR. Part 1, of course, is the Point In Time Count.

MELISSA STEVENSON: And we do use those official HUD submissions in Stella P, where you can view your system's data and your performance in Stella P. You can also run LSAs; in addition to running an official HUD submission file you can run a Local Use File. You can run that any time of the year in which you are able to run an LSA as long as there's no downtime.

MELISSA STEVENSON: You can run that for different periods of time. You can run that for different subsets of your projects. And you can use that outside of the official HUD submission process annually to look at data in Stella P. So, that's always available to you outside of this official LSA season.

MELISSA STEVENSON: What we're going to talk about now though is what data does LSA include? So, the LSA includes aggregate data for certain project types. That's Emergency Shelter, Safe Haven, Transitional Housing, Rapid Rehousing, and Permanent Supportive Housing. And that aggregate data is collected across 10 different CSV files.

MELISSA STEVENSON: So, within those files, we're collecting different types of data. We collect demographic data. That demographic data helps populate those charts that I talked about earlier in the call, those race and ethnicity charts, we reviewed those. As well lots of other demographic charts within Stella P.

MELISSA STEVENSON: We also collect, in LSA, information on length of time people experience homelessness, different patterns of system use, the way people and households move through different project types in the system.

MELISSA STEVENSON: We collect population specific data. That means certain populations where we anticipate that their needs or their eligibility for services may differ from the broader population of people and households experiencing homelessness. So, that includes populations like veterans, people in households who are experiencing chronic homelessness, as well as some other populations.

MELISSA STEVENSON: We also, in the LSA, look at data on the Prior Living Situation of households when they enter those projects. So, what they reported as where and how they were living before they entered. As well, as Exit Destinations for people and households who exited the system.

MELISSA STEVENSON: And then, of course, there's also data on projects and inventory. So, the LSA, just a note, it also brings in to those 10 CSV files project data only for Other Permanent Housing. That's project types 9 and 10 if you know the response values.

MELISSA STEVENSON: Those are not actually included in the analysis in the AHAR Part 2, and they're not reviewed for data quality. But just to note that that project and inventory data is included in the LSA files.

MELISSA STEVENSON: So, the next question you might be thinking if you're new to this, why are we collecting this data? As I mentioned, this data gets fed into the Annual Homelessness Assessment Report or the AHAR. Again, that's part 2 of the AHAR that uses the LSA. That is a report to Congress that is submitted annually. The screenshot there you can see is from the 2021 AHAR Part 2. And if you're not aware that was just posted in July of 2023, so, very recently.

MELISSA STEVENSON: And this data is important and is collected and this report is important, because accurate data...first, it makes Stella P more useful to your community. So, we want people to be able to use their data to improve their systems, right? It's also important because it's necessary for producing those national estimates that are required by Congress in the AHAR.

MELISSA STEVENSON: And then also on the right, you see a screen shot of what that looks like in Stella P. So, you could go in if you're new or you haven't used Stella P, you can go into and you can see that LSA data in those data visualizations for you. And that is sample data, that screenshot is not reflective of the entire country's LSA data, it's just a sample.

MELISSA STEVENSON: So, next I'm just going to go through a few changes that are gonna be in the 2023 LSA. Most of this won't dramatically impact what you as the HMIS Admins do or need to do. However, I know people are just curious what data we're collecting and how we're collecting it differently this year. And you will see that reflected when you look at your data in Stella P and it will also be reflected in the analysis done for the AHAR as well.

MELISSA STEVENSON: So, there would be some changes that are based on and reflective of the data standards changes that go into effect on October 1st. So, that's the FY2024 data standards. So, things like, there'll be some changes to project type around both Emergency Shelter and Rapid Rehousing.

So, Emergency Shelter used to have two different, I think it was subtypes, and now it is two different project types in HMIS: the Night-by-Night and the Entry/Exit. And then Rapid Rehousing now has those two different subtypes: Services Only, and there's the other name that I'm forgetting.

MELISSA STEVENSON: But that'll just affect the way the data's collected, but we're not expecting you, as the HMIS Admin, to need to do much because of those changes at this point.

MELISSA STEVENSON: And there will be changes to lists of response options because of those changes in the data standards. So, Race and Ethnicity is changing, those two fields become one, and also there'll be some slight differences in the response options so those will be pulled into the FY2023 LSA. We have changes to the Gender fields and the Gender response options. Those will also be pulled in. And then there's some changes to the Living Situation as well.

MELISSA STEVENSON: So, we also wanted to note that there are changes to the HMIS Participating field in the 2024 data standards, but we are not expecting those to impact the reporting for FY23 yet. Or we will not expect it in FY2023 LSA.

MELISSA STEVENSON: And then there are a few other changes that aren't specifically related to the data standards. So, we will now be collecting, in the LSA demographic data, like Race, Gender, and Disabling Condition, they'll be collected for all clients. Previously, in the LSA, we were only collecting those for adults and heads of households.

MELISSA STEVENSON: We'll also be collecting three new characteristics: adults with Serious Mental Illness (SMI), adults with Substance Use Disorders, as well as adults with HIV/AIDS.

MELISSA STEVENSON: And then the other change is, slight change to the way that details on people who are survivors of domestic violence or who are experiencing Chronic Homelessness, slight changes to the way data's collected for people who are not DV survivors or Chronically Homeless, or haven't been identified as Chronically Homeless.

MELISSA STEVENSON: So, now we're breaking out those statuses into people who we know through their responses they've identified that they are not survivors of domestic violence and through the responses they are not identified as Chronically Homeless versus people who we're not identifying as DV or CH because there's data missing. We're making that distinction.

MELISSA STEVENSON: And then, similarly, for people who are DV survivors, there is a follow up question that asks if they are currently fleeing domestic violence. We are updating the data collection in the LSA to break out some data to differentiate between households who said they were not currently fleeing and those who have an unknown fleeing status, because that data is either missing or not collected.

MELISSA STEVENSON: So, what should you be doing now? Starting very basically, please update your contact information in HDX 2.0 under my account. The AHAR team and LSA team use that information in HDX 2.0 to start communicating with you and get the process rolling. So, we want to make sure that all the contact information is correct.

MELISSA STEVENSON: I put a screenshot in there, it might be a little small, but if you already have access to HDX 2.0 you just need to update your email address. You can go to your account and do that.

MELISSA STEVENSON: We also ask that the CoC primary user update any user permissions as necessary in HDX 2.0. And they can do that through the Administration Module, and then going to Manage My Users.

MELISSA STEVENSON: And if you or your CoC need to update the primary user, you need to do that through an AAQ request. So, that is very important. Please do that. If there have been changes since the last year please do that as soon as you can.

MELISSA STEVENSON: We also highly recommend that you review the Preparing for the LSA Guidance on Common Data Quality Issues. That guide and that link there, I think Sam just posted, thanks, Sam. That is from last year and it will most likely be updated this cycle. But that being said, the guidance on common data quality issues has not dramatically changed. So, you can start with that now.

MELISSA STEVENSON: And on that note, you can start cleaning your data. So, Jesse is going to introduce you to Eva. I'll turn it over to him.

JESSE JORSTAD: Thanks so much, Melissa. I did have one question for you. If people needed to update their contact information, their primary, in HDX but then they didn't do it, what happens then?

MELISSA STEVENSON: Great question, Jesse.

JESSE JORSTAD: Okay, I think the answer is (laughs), do you want me to try? We may have trouble getting a hold of you related to the LSA and you might miss really important announcements. Or you might get to a place where you're trying to get it submitted or whatever and you run into a problem because you don't have control of the account and whatnot.

MELISSA STEVENSON: That is correct.

JESSE JORSTAD: So yes, it's important.

MELISSA STEVENSON: It's very important that your CoC primary is accurate because that is the person that the LSA team will start reaching out to. And if you are not the CoC primary and your CoC does not have an accurate primary, that information may not filter down to you. So please, if you know who the person is, talk to them, if you know it needs to be updated, please submit an AAQ, thank you. Great.

JESSE JORSTAD: Before we get into Eva, I did want to ask Fran a quick question. I've seen a couple of things pop up in the questions. I think there's a little bit of anxiety related to usability determinations. I know we talked a couple of months back about that being included in the NOFO. Is there any information you can share about where that process is at?

JESSE JORSTAD: Fran?

FRAN LEDGER: Yeah, coming.

JESSE JORSTAD: Okay, cool. Sweet.

FRAN LEDGER: I'm still here. I don't have any updated information, but I'll work to get that for folks. I know that everybody's interested, especially right now.

JESSE JORSTAD: Perfect, yes. As soon as we know what's up, you'll know what's up, right? Correct. We will pass that along. Okay, that sounds great.

JESSE JORSTAD: Okay, let's talk about one of my favorite topics, which is Eva. So, if you're not familiar, Eva is a web-based open-source tool that was released last December. Right now, the scope of that tool is very much focused on data quality, but there will be additional analytic abilities that are being built into that and released over the coming months.

JESSE JORSTAD: But, you know, in light of the LSA coming, we wanted to make sure that you all are aware of this tool and the degree to which it can be really helpful for your LSA data submission clean up. But obviously, data quality is something you can be working on year-round, and you can look at it for all of your project types, not just your LSA project types.

JESSE JORSTAD: So, I'm going to go through and talk a bit about what Eva is and then Sam's going to do a demonstration of the tool for you. So, what is it that we're even talking about? I was talking with an HMIS Admin the other day and they said something that made me feel really excited about the tool, that Eva's finding problems that they didn't even know were possible.

JESSE JORSTAD: So, it goes through, and it does an analysis of your file in terms of whether the file conforms to the specifications. And then you can interact with it to find out some of your client counts, like the number of folks you have that are active, or moved in, or had exited during the period or whatever, so that you can do a check to make sure that the data you're expecting to see in there is what you're actually seeing.

JESSE JORSTAD: Then it goes through and does some Project Descriptor data checks to make sure that things are making good sense there. And then you've got the data quality at the system level and at the organization level.

JESSE JORSTAD: Now, the color coding on here is because this tool was initially the, I think it was called the HMIS CSV data quality tool, which was Excel-based. So, we took that tool, and we beefed it up and we re-released it as a web-based tool.

JESSE JORSTAD: That tool focused on these 2 blue parts, right? So, the system structure analysis, and then the data quality of the system level. And then we built out all of these other red parts, and we beefed up the other sections as well. That's kind of the scope of what Eva does these days.

JESSE JORSTAD: There are 3 levels of issues that are sort of similar to the LSA but there are some differences, mostly because the files themselves are different. And therefore, when we talk about the files, we have to use some different language. But we tried to break it up so that way you can really focus in on the things that are going to have the biggest impact regarding what you're actually reporting out.

JESSE JORSTAD: So, we have these high priority errors. These always indicate that there's a data quality issue that can and should be fixed in HMIS. You want to aim for 0 high priority errors. So, these are things that are essentially forbidden from the data standards or forbidden because of the CSV specifications, right? So, these are all things that need to be fixed.

JESSE JORSTAD: Then there are general errors, which means that it is definitely wrong, right? It's also not allowed, but it doesn't have as big of an impact on federal reporting. Or isn't in one of the core columns that Eva's using to do additional calculations. You also want to aim for 0 general errors.

JESSE JORSTAD: Now, warnings, these may be data quality issues. So, these are things that we are not expecting to see in the data but could potentially reflect reality. So, we're just bringing them to your attention so that you can review them and make sure everything's good to go.

JESSE JORSTAD: You don't need to be aiming for 0 warnings. It's okay and actually expected that you would have some warnings because there's always those edge cases of things that happen. So, you should have your end users check that any data that's being flagged as a warning is accurate in the HMIS and if it's not accurate then it should be corrected. But if it is accurate, you just leave it as is. All right.

JESSE JORSTAD: So, Eva is here to help you with your data quality. It looks at completion rates for these data elements that are listed here and many more. These are just the ones that also impact your LSA. And it also does some logical comparisons of things. Like do you have a Head of Household assigned? Do you have more than one head of household assigned, which causes other problems.

JESSE JORSTAD: Also helping with those Project Descriptor Data Elements, as I previously talked about. So, your geography and address information, inventory, fund sources as well, though that's not listed here.

JESSE JORSTAD: And then utilization related issues. So, the flag structure in the LSA is a little bit different than what we're getting in your HMIS CSV, but things that could be causing utilization related flags that are in the LSA are things that can be identified by Eva.

JESSE JORSTAD: So, some things that you might see come up is that you've got a project that's active and it has active inventory, but there's no client served. That would be a warning because it could be that maybe the project just started a few weeks before the end of the reporting period and it actually doesn't have anyone moved in yet. That's legit, but we do flag that for you so you can look to see, well, maybe the agency never entered a whole year's worth of data or whatever, right?

JESSE JORSTAD: It also allows you to look for possible missed move-in dates. So, you can set the amount of time that you think would pass before somebody would have a move-in date and it will tell you everybody who has gone beyond that date for that time frame, if you will.

JESSE JORSTAD: And then the same thing for possible missed exit dates. So, the missed exit dates can really blow up your Length of Time Homeless that's being calculated by the LSA.

JESSE JORSTAD: And then last, but certainly not least, those very painful overlapping and duplicate enrollments. Sam, I didn't tell you about this ahead of time, but if you could grab the link to the Duplicate Inventory Guidance.

JESSE JORSTAD: There are some overlaps that are allowed. Eva only flags the ones that are problematic. And so, if you need guidance about how to resolve those, there is some guidance that's listed in the application itself, but you can also get the more in-depth guidance from this resource that Sam's about to drop in the chat here in a moment.

JESSE JORSTAD: Eva does way more checks than this and one of the things that's tricky about conveying all the things Eva can do to all of you is that you'll only see the checks that Eva finds problems with, right? So, if you don't have a particular problem in your file, you don't know that Eva already checked to make sure that's not there.

JESSE JORSTAD: So, to help you out with that, we do have a downloadable file where you can look to see all of the checks that Eva's running and all of the guidance that will be provided if you have that problem. So, Sam just dropped that link, she's so on top of it. So, you can review that and see what all it can help you with.

JESSE JORSTAD: What is not covered by Eva. So, a lot of people want to know why wouldn't we just do a 1 to 1 relationship between Eva and the LSA and make everyone's lives a lot easier. There's a couple of reasons for that, and the data contained within the LSA export is aggregate. So, some of the errors are related to how that aggregation happened.

JESSE JORSTAD: So, here's an example on the screen that is hard to read because it's in the programming speak that we have. But what this is essentially saying is that there's 1 field that has a certain value and another field that has a certain value and that those things should be matching.

JESSE JORSTAD: So, it could be something like you said you had 10 adults here, but the sum of these fields is 12. That's not possible, something is wrong with the programming of your LSA. Those are not things that Eva can find, because that's essentially how your HMIS did the math.

JESSE JORSTAD: Then the other piece is that there are parts of the LSA that are comparing your HMIS inventory to the HIC that you reported. Eva doesn't have access to what you reported for your HIC. And then the same thing looking at PIT versus enrollment data. Eva doesn't have access to your PIT data and so can't do those checks either. So, those are the things that are not in there, but it does cover the bulk of issues you're going to run into.

JESSE JORSTAD: The other thing is that it's possible that if you resolve a single issue that Eva has flagged, like let's say that you have a household that's missing head of household, that it could resolve several flags in your LSA.

JESSE JORSTAD: We have some resources that we want to make you aware of, they'll get dropped in the chat here. The Eva Exchange page, which also has the Quick Start Guide on it.

JESSE JORSTAD: And then we also have a Github site for Eva. That's where you can find that list of checks. It also gives you the list of what we consider core columns. So, essentially, if you have an issue in those columns, you can't use either until it gets resolved, because we can't do the math accurately because there's a problem there.

JESSE JORSTAD: But the other thing that's really cool about that is that you can use that site to submit issues and interact directly with the people who are developing the application. So, I think that that's a really nice feature that we've been able to offer. And you could also provide suggestions for enhancements that we'll review and prioritize and discuss with HUD and see if we can make it as useful as possible for all of you.

JESSE JORSTAD: So, again, if you need help, you can go ahead and submit that on Eva's Github site. So, you can create a free account on that site. And then you would just click that new issues button and you can log whatever's going on there. It's helpful if you include screenshots. Do not ever attach your export to a ticket. It does have that warning in there but please do not send us data that we don't have the permission to actually view.

JESSE JORSTAD: And the other thing that's great about that is that you can see other issues that users have reported. So, you can see if something's already in process to fix something that's going on.

JESSE JORSTAD: If you're not sure how to generate your hashed HMIS CSV, which, the specification is the HMIS CSV specifications, right? And we need you to generate a file that is hashed. If you're not sure how to do that, you can ask your vendor, they'll be able to help you.

JESSE JORSTAD: In some systems, it might be called your RHYMIS export because there's a lot of things that have changed over the years and there used to be a specific RHYMIS export that needed to be hashed and that might be where it's at. So, that could have led you astray. So, that's my tip of the day.

JESSE JORSTAD: All right, so Eva can take a file that is for any time period for all of your project types in HMIS. You can just give the whole thing to Eva, and she can take care of it. But if you want to be very focused in preparation for your LSA submission, these are the report parameters that we recommend that you run.

JESSE JORSTAD: So, you're going to take the report period plus the prior 2 years. So, in this case, October 1st, 2020, through September 30th, 2023. Now, you will note we have not arrived at September 30th, 2023 yet. So, if you were going to run it today, you'd want to end the file on 8/16/2023.

JESSE JORSTAD: The project types that you should include our Emergency Shelter, Safe Haven, Rapid Rehousing, Permanent Supportive Housing, and Other Permanent Housing. Although, as Melissa noted earlier, the Other Permanent Housing enrollment data are not being looked at in the LSA, it's only the project descriptor data. So, just know that.

JESSE JORSTAD: You'll want to prioritize your high priority errors, obviously, and then things that are related to your Universal Data Elements, including warnings that are related to that. You'll want to make sure that those things are all accurate, because those are the fields that are used in the LSA.

JESSE JORSTAD: All right, drum roll please. Sam, are you feeling ready to rock this demo?

SAMANTHA KAMEYAMA: Yes.

JESSE JORSTAD: Awesome.

SAMANTHA KAMEYAMA: Yes, I am ready. Thanks.

JESSE JORSTAD: Perfect. All right, take it away.

SAMANTHA KAMEYAMA: Okay. Let me know if you can see my screen.

JESSE JORSTAD: Looks great.

SAMANTHA KAMEYAMA: Okay, good. So, I will be doing a demo of Eva. The easiest way to get to Eva is a few bookmark it, and then you can just have easy access to it. But the other easiest way is, I'm actually gonna go on the HMIS Eva page on the HUD Exchange.

SAMANTHA KAMEYAMA: On this page, at the bottom, you have the access Eva link that will take you to Eva. And then there's also a link to the Github, which I will show you later. But that is where you can put in issues and check the code all those things. And then you're also able to access the Eva Quick Start Guide here as well. It provides information on what you'll need to use Eva and how Eva handles your data.

SAMANTHA KAMEYAMA: So, when you click onto Eva, it lands you on the Homepage. So, on this page is an introduction/overview of Eva. Something I do want to note is that whenever you see these reddish orange plus signs, that means that you are able to expand that section. This is especially important for the instructions section on each of these tabs because that's going to give you some guidance and helps explain what the tab does. And also, you are able to collapse and expand this left-hand menu by clicking the 3 lines at the top.

SAMANTHA KAMEYAMA: So, here in the instructions on this tab, it talks about the hashed HMIS CSV export, which Jesse was talking about. So, a hashed export means that the personal identifiers are obscured when the export is generated. But when you do export your file, please make sure to store it in a secure location since it still has some client-level data in it. Again, if you don't know how to export your hashed HMIS CSV export, the best way to figure that out is to ask your vendor.

SAMANTHA KAMEYAMA: Then we have a Need Help section, which has some troubleshooting tips if you are having some issues with Eva. And then our Citations and Special Thanks section.

SAMANTHA KAMEYAMA: So, then what we do next is we upload our HMIS CSV export. You can either do that by clicking on the tab on the left or clicking this "Click here to get started" button. It takes you to the same place. So, as you see here, I already have a file uploaded, so we don't have to wait around for it.

SAMANTHA KAMEYAMA: On the Upload HMIS CSV export tab, you're going to be able to see your HMIS CSV Export File Structure Analysis. So, as a reminder, this analysis is not your data quality check for your PDDEs, your UDEs, et cetera. This is simply verifying that the file you have uploaded. It's checking it against the HMIS CSV specifications that HUD has released. So, it's checking that your file has the right names, columns, data types and allowable values.

SAMANTHA KAMEYAMA: As Jesse spoke about before, for Eva, we have 3 types of issues: high priority errors, general errors, and warnings. And for this file structure analysis, high priority issues that prevent Eva from functioning will cause your file to be rejected and Eva. But no matter if your file is rejected or successfully uploaded, you will still get this File Structure Analysis and you will still be able to download the Structure Analysis Detail.

SAMANTHA KAMEYAMA: So, here in the summary in this example, we see that there are 6 issues that are all Incorrect Columns and all the issue types are warnings. And if you want to find more information about it, you can just download the Structure Analysis Detail. This is the 1st of several exports that you're able to get from Eva. So, let me actually open that File Structure Analysis Download to see what it looks like.

SAMANTHA KAMEYAMA: I just want to make sure that my screen changed to Excel, I hope it did. Let me know if it did not.

JESSE JORSTAD: It looks good, Sam.

SAMANTHA KAMEYAMA: Great. So, this download shows all of the issues that was found by Eva in your files. So, we can see the 6 separate incorrect columns issues. And then it has the guidance column, which, whenever you see a guidance column, it is basically explaining more about what that issue actually means.

SAMANTHA KAMEYAMA: And then in the detail you're able to see where exactly this issue showing up. So, you can go and look for it or you can send this to your vendor, and you can work with them about these issues that Eva is finding in your file.

SAMANTHA KAMEYAMA: Okay, so then we'll just keep going down the tabs. We're going to go to this Edit Local Settings tab. So, this Edit Local Settings tab, it's basically acknowledging that some data quality checks and analysis is more useful if we have the local settings or policies that have been set by your community.

SAMANTHA KAMEYAMA: For example, outstanding referrals. What is the maximum number of days that a referral can stay open according to your CoC's local Coordinated Entry process? And then for longstayers...sorry for all the scrolling. What is the maximum period of assistance for specific project types after which you'd like a project or an organization to confirm if the client is still active in the project?

SAMANTHA KAMEYAMA: The thing that I do want to note here is that there are some default values in these, but these do not imply any HUD recommendations. This won't be as relevant to your LSA, but I just wanted to point it out in case you're wondering since I'm doing a demo anyway.

SAMANTHA KAMEYAMA: Next is the View Client Counts tab. So, this tab finds number of households/clients who have been served in each project and their enrollment status at the time that the HMIS CSV export was generated.

SAMANTHA KAMEYAMA: So, the first thing you'll see is that you can choose a date range. These dates are defaulting to the export start and export end date, but you're able to change it to any dates within the export start and export end. And I'll show the export in a second.

SAMANTHA KAMEYAMA: And then you'll see that you're able to change the project to change the summary and detail sections below. So, I'm just going to quickly show you what it looks like if I change...let's change this to the Rapid Rehousing other project. And you're gonna see the different kinds of statuses that are available. So, it's "Active no move-in", "Currently moved in", "Exited no move-in”, "Exited with move in". And then if we move on to the Client Counts Detail, you're able to see a bit more information down to the client and enrollment level.

SAMANTHA KAMEYAMA: Now, I do want to quickly show the Client Counts Download. Let me grab that real quick.

SAMANTHA KAMEYAMA: So, this is what the Client Counts Download would look like. The first tab is the Current tab. So, this is information as of the export date. It shows a summary per project of how many clients are in each status. This next tab is the Validation - Date Range tab. So, this shows a summary of the statuses of the clients, again, in each project within the date range that you have chosen on Eva. And then the next is your Detail tab. So, it shows the status by client, by enrollment, within the date range that you have chosen.

SAMANTHA KAMEYAMA: So, this Client Counts Report could be useful for some of your LSA flags. For example, the LSA only counts clients or households that are, I think they call it "active-in-residence", meaning they either have a Move-in Date, are enrolled in an Emergency Shelter, or have a bed-night date in case of Night-by-Night shelter.

SAMANTHA KAMEYAMA: So, for example, if you have a flag where it says that no one was served in a project, but you know there are clients active in that project. You can run this report and you can see they are active in the project, just none of them have any Move-in Dates. So, that could let you know that you have to add Move-in Dates to all the clients in this project.

SAMANTHA KAMEYAMA: Okay, I'm going to scroll back up again and then we're gonna go to the really, really important part of Eva, which is the Assess Data Quality Section. So, this section, if we click on that, you'll see that there are 3 tabs underneath it. So, let's head to the Check PDDEs tab first.

SAMANTHA KAMEYAMA: At the top, you're going to see a summary of all of the issues that Eva saw in your file. So, we'll see here that there's one issue that says Inventory Start Precedes Operating Start.

SAMANTHA KAMEYAMA: And then we have the download button, which we'll look at later. And then you have your guidance section that explains more in detail about what the issue actually means. And I think Jesse mentioned this before, but the issues and the corresponding guidance in this section that you'll see here is just based on what issues Eva actually found in your file. These are not all of the possible issues that Eva checks for.

SAMANTHA KAMEYAMA: So, let's say that we download this PDDE report, so, let me open that as well.

SAMANTHA KAMEYAMA: So, when you download your PDDE report, this is what you'll see. The first tab is the summary, which is the same information that was shown on Eva itself. And then the next tab is your data tab. So, it shows in more detail about the issues that Eva found.

SAMANTHA KAMEYAMA: So, I've made these columns filterable. So, for example, there's an LSA flag that flags any project where the earliest Inventory Start Date is earlier than the project's Operating Start Date. So, let's actually look for this issue right now. So, I can see it's right here, Inventory Start Precedes Project Operating Start.

SAMANTHA KAMEYAMA: And here, it shows in the detail section what exactly is tripping that issue in Eva. So, it says here that the Inventory Start Date was on January 27th, 2011, but the project's Operating Start Date is October 1st, 2016. So, that means that you would need to check on this Emergency Shelter project under Organization J to see the issue within those Project Descriptor data elements.

SAMANTHA KAMEYAMA: Now, we'll go on to the System Level tab. So, for the System Level tab, right at the very top you'll see the download button. We'll look at that later, again. I just want to first talk about these visualizations that Eva shows on the screen.

SAMANTHA KAMEYAMA: So, these three visualizations are split up into the three types of issues that Eva has, which is the high priority, general, and warnings. So, each of these visualizations are set up in the same way. On the top right there are 2 tabs. The 1st tab, which is what it defaults on, is the top 10 issues. So, showing the top 10 issues within each issue type. So, for example here, for high priority errors, the most common one is this Duplicate Entries.

SAMANTHA KAMEYAMA: And then if you go to the next tab, which is top 10 organizations, this is showing you the organizations with the most number of high priority errors in your community. So, it says here that Organization J has the most number of high priority errors in your community.

SAMANTHA KAMEYAMA: So, this can be helpful because it could flag whether there needs to be a training specific to an organization, or if they need to change the workflow, or even if you need to focus on this organization for your LSA DQ fixes.

SAMANTHA KAMEYAMA: Again, these visualizations are set up the same. We just have one for general errors and one for warnings. So, let's actually take a look at... I'm really sorry for all this scrolling...but I'm gonna take a look again at the download.

SAMANTHA KAMEYAMA: So, this will be your System Level Data Quality report. I can go over quickly what the different tabs are. I know that there's a lot in the bottom, but the first is just your Export Information. The next is your System Summary. So, this is just going to let you know how many enrollments have each issue in your file.

SAMANTHA KAMEYAMA: And then the Organization Summary shows you how many enrollments have each issue by organization. So I can see here that 62 of the Duplicate Entry errors or issues is in Organization J. Then we have the Guidance tab, which gives you more information about what the issues actually referring to or talking about.

SAMANTHA KAMEYAMA: And then we have these next 3 tabs, which are really important. They are all of the details for each issue by client by enrollment that's separated out by issue types. So first we have the High Priority Errors. So, this will help you find exactly where this Duplicate Entries file is based on the Client ID and Entry Date.

SAMANTHA KAMEYAMA: Another one we can take a look at is there's this flag that Eva has which is Missing Relationship to Head of Household. And then we can see exactly which of these clients and in which enrollment those are missing.

SAMANTHA KAMEYAMA: And then we have a tab each for the General errors and the Warnings, and those are set up the same. And then we have an Overlap Details tab, which Jesse was talking about. This is a way to find potential overlaps in your community. On the left-hand side is your first enrollment, for each row on the left-hand side. And then on the right-hand side is the potential overlapping enrollment.

SAMANTHA KAMEYAMA: I'm sorry, I'm going kind of fast, I know it's a lot of information.

SAMANTHA KAMEYAMA: And then you have your Referral Details, which this is just talking about are these referrals, have they been open longer than that set amount of time you put in your Edit Local Settings.

SAMANTHA KAMEYAMA: So, then let's go on to the Organization Level. This is the same as the system level, but at the organization level, so that you're able to focus more on what errors need to be fixed by organization. So, at the top, you're able to choose which organization you want to look at. Right now, we're looking at Organization A.

SAMANTHA KAMEYAMA: And then these 3 visualizations that you're going to see, they are very similar to the ones that we already saw, to the system level ones. They're split into the 3 categories of issues. Except this time this would be the top 10 issues within that organization, and then the second tab is the top 10 projects. So, within that organization, which projects here have the most number of high priority errors.

SAMANTHA KAMEYAMA: And then I'm going to scroll under these visualizations...and then we have the Data Quality Summary. It lets us know how many clients have a specific issue by project. And then, again, the guidance.

SAMANTHA KAMEYAMA: So, I will quickly show the Organization Level Data Quality Report. So, this one I've already downloaded, it's for Organization A. Again, it's set up the same as the System Level Data Quality Report, just at the organization level.

SAMANTHA KAMEYAMA: So, it starts with this Organization Summary letting you know how many enrollments have each issue. And then you have the Project Summary where it's letting you know how many enrollments have each issue but by project. And then again, you have the Guidance. And then the separated out errors by issue types. So, here we have high priority and then we the general errors and then we have the warnings. And then the Overlap Details and Referral Details.

SAMANTHA KAMEYAMA: So, this is important, this organization level data quality report, because instead of having to manipulate that System Level Data Quality report multiple times just to send it out to your agencies to fix those errors, you can just run this, or you can just download the specific report and you can just send it to them like this.

SAMANTHA KAMEYAMA: I know we don't have a lot of time left, so I'm just going to go back to Eva really quick and show that there is a Changelog, which is always good to take a look at to see what significant changes have been made to Eva.

SAMANTHA KAMEYAMA: And then I also want to quickly show...so, this is the Eva Github page. What I wanted to show was the Public Resources folder in the code tab, so, there's all these tabs up here, and then you have the Public Resources folder. And this is the folder where I was able to link to the full list of Eva checks that Eva does. So, if you're curious about what checks Eva does.

SAMANTHA KAMEYAMA: And then the next tab is the Issues tab, which is where you're able to submit an issue if you would like. Or you could even submit a feature request if you want to see something in Eva that we are not doing yet.

SAMANTHA KAMEYAMA: And, yeah, I think that was all I had. Yeah, I think that's all I have.

JESSE JORSTAD: Wonderful job, Sam, thank you so much.

JESSE JORSTAD: I was just typing this, so I will finish typing it when I get done saying it, but [attendee] had asked a question about a report that wasn't showing any PDDE errors, and she wasn't sure if that was correct.

JESSE JORSTAD: My first instinct is that it might be if you have pulled an export from your system that is very narrow in terms of the time span, maybe a month or so or whatever, or if you've really limited your project types. Actually, the timeframe wouldn't affect the PDDEs, just in general with the file. But if you've limited your projects and you're just pulling an export for a single project or something, then you might see that come up, that there are no PDDE errors. Or it could be that you don't actually have any.

JESSE JORSTAD: But if you need any assistance either way, you can go ahead and put something in GitHub. You don't have to have a confirmed problem to log in in Github. You can pretty much just be asking for help, and we'll reach out to you and get you sorted out.

JESSE JORSTAD: Okay, let's see here. We are almost at the end of our time, let's get this thing wrapped up.

JESSE JORSTAD: Okay, so, I did see a question come through a little while ago about somebody who's new in their position. I want to make sure that you are aware that there are these foundational resource links that Sam's gonna drop in the chat for all of you. These are a great place to get started.

JESSE JORSTAD: Fran, did you want to add something?

FRAN LEDGER: Yeah, you leave on vacation for 2 weeks and then there's an update. So, the LSA usability results will go out to people... we're looking at the end of next week. It's going to go to the CoC primary contact and the HMIS Lead listed in the CoC registration process. Hopefully, that was helpful.

JESSE JORSTAD: Perfect, thank you, Fran. That's great. Okay.

JESSE JORSTAD: We also have this listing of newer resource links that have come out. So, as Melissa was sharing earlier, there's a new Stella P Race and Ethnicity Analysis Guide. And then also more recently, or well, not more recently, but recently, the "We Listened - Centering Identity Through Changes In Data Collection".

JESSE JORSTAD: We will see you back here on September 20th. Hey, Meradith.

MERADITH ALSPAUGH: Yes?

JESSE JORSTAD: Are you a Star Wars fan?

MERADITH ALSPAUGH: No.

JESSE JORSTAD: Well, I am a Star Wars fan and the new Ahsoka series is coming out today. So, I do have evening plans. but I was thinking, gosh, it would be so handy if I could email a Jedi. Do you have any idea why that isn't a thing that we can't just email a Jedi with a question?

MERADITH ALSPAUGH: No, why, Jesse?

JESSE JORSTAD: Cause attachments are forbidden. That one goes out to all my Star Wars friends. Thank you. It's a very niche joke, but for those of you who get it, you really get it.

JESSE JORSTAD: All right, we're going to stay on for a little while and try to make sure we got all your questions answered. If we do happen to miss you, you can also submit an AAQ and we'll get around to it that way.

JESSE JORSTAD: I hope you all have a lovely rest of your Wednesday, especially those of you who are checking out Ahsoka later today. We've been waiting a long time for this. All right thanks. Everybody.