



# End of Year Reporting DQ Reports:

LSA/SPM Annual Review Audit and Street Outreach DOE



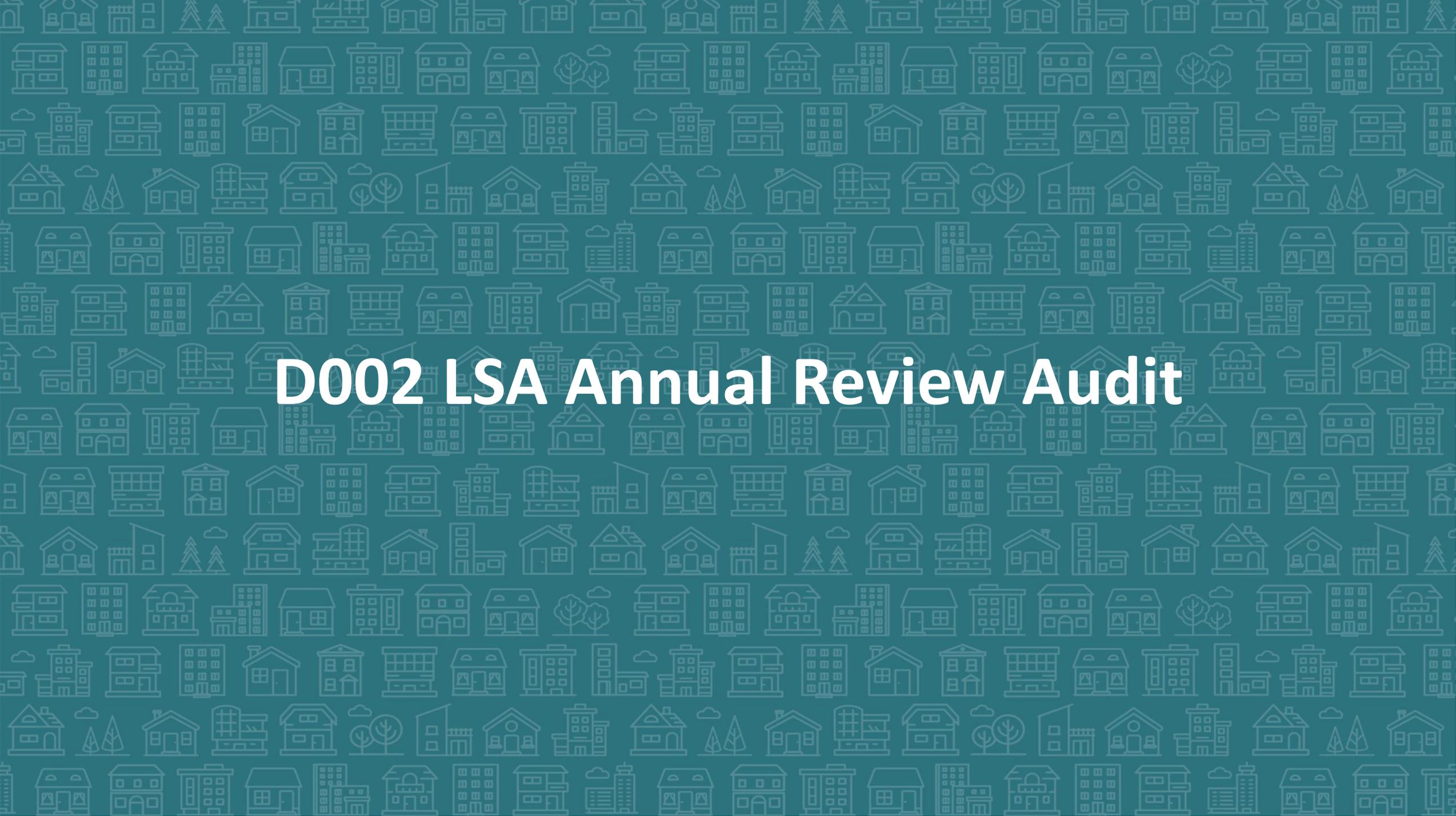
**NC COALITION** to  
**HOMELESSNESS** end

# Presentation Agenda

By the end, attendees will be able to:

- ✓ Locate the reports in BusinessObjects
- ✓ Correctly enter prompts for each report
- ✓ Understand how to navigate the report
- ✓ Identify errors located on the report
- ✓ Take steps to correct errors on the report





# D002 LSA Annual Review Audit

# D002 LSA Annual Review Audit

This report looks for missing or inaccurate Annual Assessments.

- To be run by all project types
- One report run per HMIS project
- Orange County projects: run and correct FY2021 reports first!



# D002 LSA Annual Review Audit

## Special Considerations for Errors related to Annual Assessments

### MAJOR Things to Know

- Must be completed 30 *calendar days* (before or after) the Head of Household's anniversary date.
- Only one Annual Assessment can be recorded per year.
- Interim must be marked as "Annual"



# D002 LSA Annual Review Audit

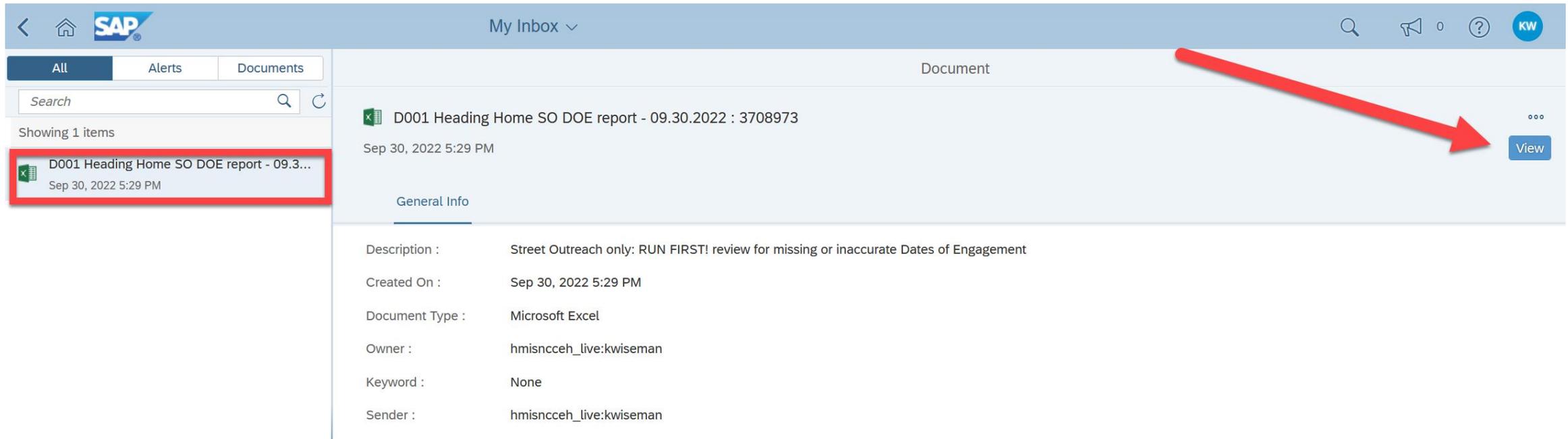
## Step 1: Reporting Licensed Users will need to schedule the report in BusinessObjects

The screenshot displays the SAP BusinessObjects Explorer interface. The left sidebar shows a folder tree with 'Public Folders' (1), 'chin\_live\_folder', 'hmisncceh\_live\_folder' (2), and 'HMIS@NCCCEH Gallery' (3) highlighted. The main pane shows the 'Selected Folder' path: 'Public Folders / hmisncceh\_live\_folder / HMIS@NCCCEH Gallery /'. A table lists reports, with 'D002 LSA Annual Review Audit' (4) highlighted in yellow. A red arrow points to the 'More' menu icon for this report.

Title	Favorites	Type	Description	Last Updated	
C004 - Avg LOS and Time to Housin...		Web Intelligence	Updated: 1/26/2018 (SC) Add...	May 16, 2022 3:07 AM	...
C005 - Client Income Audit - Stayer...		Web Intelligence	Updated: 10-11-18 Added a s...	Jun 2, 2022 2:44 PM	...
C007 - Returns to Shelter or TH Pos...		Web Intelligence	9-4-15 The selects clients fro...	May 16, 2022 3:07 AM	...
C008 - Exit Income Outcomes_All C...		Web Intelligence	Updated - 8-3-18 -Corrected r...	May 16, 2022 3:07 AM	...
C009 - 0551 - Exit Reason Leaving ...		Web Intelligence	Want to see the various reaso...	May 16, 2022 3:07 AM	...
C010- Housing Move in Date and Pr...		Web Intelligence	This report shows open clients...	Jul 31, 2022 7:15 AM	...
C011- Shelter Stayers, Leavers and ...		Web Intelligence	This report shows client level ...	Jun 2, 2022 3:24 PM	...
C012- Street Outreach Stayers, Lea...		Web Intelligence	This report shows client level ...	Jun 21, 2022 3:11 PM	...
D001 Street Outreach DOE		Web Intelligence	Street Outreach only: RUN FI...	Sep 30, 2022 2:53 PM	...
<b>D002 LSA Annual Review Audit</b>		Web Intelligence	All Projects: confirm stayers/le...	Sep 30, 2022 5:05 PM	...
D003 LSA Client Data Clean Up		Web Intelligence	All Projects: basic client level ...	Sep 30, 2022 2:53 PM	...

# D002 LSA Annual Review Audit

**Step 2: Reporting Licensed Users will need download & distribute report to HMIS users for correction!**



The screenshot shows the SAP My Inbox interface. The top navigation bar includes the SAP logo, 'My Inbox', and search, notification, and help icons. Below the navigation bar, there are tabs for 'All', 'Alerts', and 'Documents'. A search bar is present, and the results show 'Showing 1 items'. The first item is a document titled 'D001 Heading Home SO DOE report - 09.30.2022 : 3708973', which is highlighted with a red box. To the right of the document title, there is a 'View' button, which is also highlighted with a red arrow. Below the document title, the 'General Info' section is visible, containing the following details:

Description :	Street Outreach only: RUN FIRST! review for missing or inaccurate Dates of Engagement
Created On :	Sep 30, 2022 5:29 PM
Document Type :	Microsoft Excel
Owner :	hmisncceh_live:kwiseman
Keyword :	None
Sender :	hmisncceh_live:kwiseman

# D002 LSA Annual Review Audit

Step 3: All HMIS user can should review & correct the reports

Step 4: Reporting licensed users need to run the report the following day to confirm it is accurate.

## What to look for on this report:

- ❑ Head of Household Errors
  - Clients with missing rHOH data elements (blank)
  - Households without someone listed as Self-Head of Household
  - Households with multiple people listed as Self-Head of Household

THESE ERRORS MUST BE FIXED FIRST & A NEW REPORT RUN BEFORE MOVING ON TO THE OTHER TABS!

HoH Error Type
Client Missing Relationship to Head of Household
No Head of Household
No Head of Household
No Head of Household
Multiple Heads of Household
Multiple Heads of Household
No Head of Household
Multiple Heads of Household

- ❑ Missing or Inaccurately dated Annual Assessments for the year
- ❑ Clients with duplicate Annual Assessments for the year

Reviews on This Date
2
2
2

# REMINDER!

There are resources developed to help guide you:

## ZenGuides:

- *Guides to learn how to use BusinessObjects:*
  - ✓ Using BusinessObjects 101
  - ✓ How to Schedule BusinessObjects Reports
- *Guides specific for this clean up process:*
  - ✓ D002 LSA Annual Review Audit Report

All are available here: <https://ncceh.zendesk.com/hc/en-us>

Helpdesk: [hmis@ncceh.org](mailto:hmis@ncceh.org)

Reach out sooner rather than later for support. We are here to support the valuable work you do!



NCCEH

# D001 Street Outreach DOE

# D001 Street Outreach DOE

This report looks at Date of Engagements for Street Outreach enrolled clients. The report will help you identify clients with:

1. Missing Dates of Engagement
2. Dates of Engagement prior to Project Start Date
3. Dates of Engagement on or after Project Exit Date

- THIS SHOULD BE THE FIRST REPORT RUN!
- To be run by only Street Outreach projects
- One report run per HMIS project
- Orange County projects: run and correct FY2021 reports first!

# D001 Street Outreach DOE

## Things to Consider:

- There is only 1 date of engagement per project stay
- Dates of engagement must be on or after Project Start
- Dates of engagement must be prior to Project Exit
- Clients without a date of engagement will NOT pull into data quality reports!
- Clients without a date of engagement are “allowable” but must be confirmed as accurate during this process. Your agency verifying active attempts are being made to engage this client but to date, this client still is not an active participant (i.e. not completing assessments or working on case plans).
- Clients without a date of engagement should be reviewed to determine last Current Living Situation contact recorded by the project. If longer than 90days, the client should be exited as of the last date of service/contact.



# D001 Street Outreach DOE

## Step 1: Reporting Licensed Users will need to schedule the report in BusinessObjects

The screenshot shows the SAP BusinessObjects Explorer interface. On the left, the 'Folders' pane shows a tree view with 'HMIS@NCCEH Gallery' selected, indicated by a yellow circle with the number '3'. The main pane shows the 'Selected Folder' path: 'Public Folders / hmisncceh\_live\_folder / HMIS@NCCEH Gallery /'. Below this is a table of reports with columns: Title, Favorites, Type, Description, and Last Updated. The report 'D001 Street Outreach DOE' is highlighted in yellow, with a yellow circle containing the number '4' next to its checkbox. A red arrow points to the 'D001 Street Outreach DOE' row.

Title	Favorites	Type	Description	Last Updated
C004 - Avg LOS and Time to Housin...		Web Intelligence	Updated: 1/26/2018 (SC) Add...	May 16, 2022 3:07 AM
C005 - Client Income Audit - Stayer...		Web Intelligence	Updated: 10-11-18 Added a s...	Jun 2, 2022 2:44 PM
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# D001 LSA Annual Review Audit

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## What to look for on this report:

### Missing Dates of Engagement

- Clients who exited without DOE
- Clients who are still enrolled without DOE

Date of Engagement
Missing (EXITED client)
Missing (ACTIVE CLIENT)
00/00/0000

The missing DOE should be fixed if the client was engaged. Otherwise, the Agency Admin should make a note of confirmation for missing DOE clients left on the report when reports are all submitted.

### Inaccurate Dates of Engagement

- Clients with a DOE prior to project entry
- Clients with a DOE on or after project exit

Entry Date	Exit Date	Date of Engagement
05/25/2022		04/26/2022
06/29/2022		02/23/2022
02/24/2022	9/16/2022	9/23/2022



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