



# End of Year Reporting DQ Reports:

D003 LSA Client Data Clean Up  
PART ONE (Tabs 1 & 3)



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

# Presentation Agenda

By the end, attendees will be able to:

- ✓ Locate the report in BusinessObjects
- ✓ Correctly enter prompts for the report
- ✓ Understand how to navigate the report
- ✓ Identify errors and correct errors on the “Fix These First” and “Client Detail” tabs of the report.





# D003 LSA Client Data Clean Up

## D003 LSA Client Data Clean Up

This reports looks at the bulk of client level errors, including:

- relationship to head of household
- client location
- Date of birth
- SSN
- Vet status
- Demographics
- homeless history
- DV history
- Disabilities
- Income
- Housing Move In Dates
- Overlapping Service Dates
- Length of Stay

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



# D003 LSA Client Data Clean Up

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

The screenshot shows the SAP BusinessObjects Explorer interface. The left sidebar displays a folder tree with the following items: Personal Folders, My Subscribed Alerts, Public Folders (marked with a '1'), Available Reports and Templates, Available WellSky Resources, chin\_live\_folder, hmisncceh\_live\_folder (marked with a '2'), ART Gallery Reports and Resources, HMIS@NCCEH Gallery (marked with a '3'), Research Project Reports, and Provider Specific Folders. The main area shows the 'Selected Folder' path: Public Folders / hmisncceh\_live\_folder / HMIS@NCCEH Gallery /.

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

A red arrow points to the three-dot menu icon in the rightmost column of the table row for 'D003 LSA Client Data Clean Up'. The number '4' is placed in a yellow circle next to the row's checkbox.

# D003 LSA Client Data Clean Up

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

The screenshot shows the SAP My Inbox interface. On the left, a sidebar contains navigation tabs for 'All', 'Alerts', and 'Documents'. Below these is a search bar and a list of items, with one item 'D00' highlighted by a red box. The main area displays a document titled 'D00: [redacted].2022 : 3708973' with a red arrow pointing to the 'View' button. Below the document title, the 'General Info' section is visible, containing the following details:

Description :	[redacted]
Created On :	Sep 30, 2022 5:29 PM
Document Type :	Microsoft Excel
Owner :	hmisncceh_live:kwiseman
Keyword :	None
Sender :	hmisncceh_live:kwiseman

**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.**

# D003 LSA Client Data Clean Up

## **Tab 1: Fix These First!**

**THESE ERRORS MUST BE RESOLVED!**

### Head of Household Errors

- Clients with missing relationships to Head of Household at Project Start
- Households without someone listed as Self-Head of Household
- Households with multiple people listed as Self-Head of Household
- Minor children marked as “Self”

### Date of Birth Errors

- Clients with Missing Dates of Birth (including DKR)

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



# D003 LSA Client Data Clean Up

## Tab 3: Client Detail

### *Data Elements included:*

- Name
- Demographics
- SSN
- Date of Birth
- Veteran Status

### *Error Types:*

- Client Doesn't Know
- Client Refused
- Missing ("blank" data)
- Answer does not match data quality field (i.e. only 4 numbers for SSN but marked "full SSN")
- Age of client doesn't match available option (i.e. 12yr old veteran)



## D003 LSA Client Data Clean Up

### **Tips for making corrections:**

- ✓ Set Enter Data As before editing data
- ✓ Set Back Date Mode
  - For Tab 1: corrections will be at Project Start
  - For Tab 3: corrections will be at Project Start
- ✓ Client Doesn't Know or Client Refused is “allowable” but must be confirmed as accurate when reports are submitted

**Remember:** *Corrections made TODAY in HMIS will not appear until TOMORROW when a new BusinessObjects report is run!*



# 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:*
  - ✓ D003 Client Data Clean Up 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!

Part 2 of the LSA Client Data Clean Up cover the additional tabs will be next week!

