# HMIS DATA ENTRY GUIDE FOR
WEEKLY DATA MONITORING AT NIGHT-BY-NIGHT EMERGENCY SHELETRS

Clients actively staying at the shelter should all have open entry/exits. Clients that haven't returned to the shelter in 7 days should be exited on the last day they stayed at the shelter. Run the **Bookend Data Quality report** to identify clients currently being served at the shelter that don't have entry/exits added and clients who had left the shelter 7 or more days ago that haven't been exited from your shelter provider.
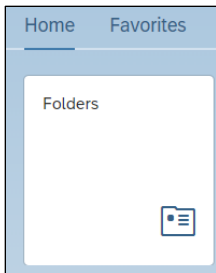
RUN THE BOOKEND DATA QUALITY REPORT

Run this report on an afternoon (after 12pm) weekly to monitor the quality of the data entries at your night-by-night emergency shelter program.
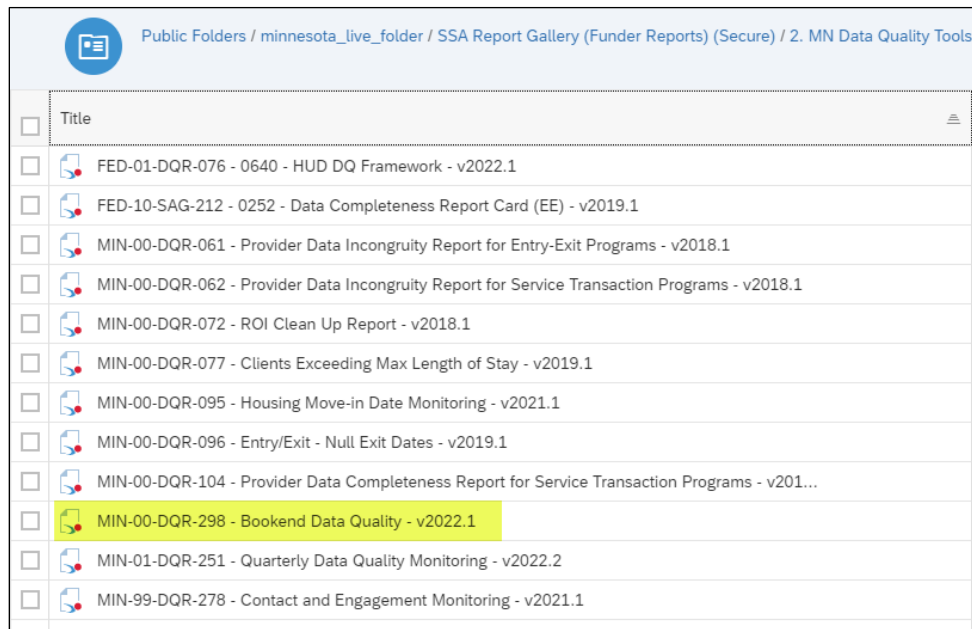
1. Log into **Community Services**.

2. Click on 'Connect to BusinessObjects' at the upper right corner of your screen, which will launch a new tab in the browser
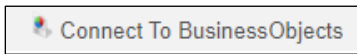
3. Click on **Folders** to proceed

4. Find the **Bookend Data Quality Report** via the following path:
   Public Folders → minnesota_live_folder → SSA Report Gallery → 2. MN Data Quality Tools

5. Right click on the report name and select 'schedule'

6. On the Schedule screen, you will need to make several selections:

   a. <u>Title</u>: This where you can add a name for the report

   b. <u>Destinations</u>: The default delivery destination is your **Instances** folder. Optionally, you can choose to save a copy in your **BI Inbox** as well. Click on **Add** to specify a new delivery destination.

   c. <u>Recurrence</u>: Select **Now** to run the report immediately or select a future time when the report should be run. Reports can also be scheduled to run regularly if you select the **Recurring** option.

7. When the title, destinations, and recurrence fields have been completed, click on **Report Features,** and make the final two required selections.

   a. <u>Format</u>: Select **Microsoft Excel - Reports** file format

   b. <u>Prompt Values</u>: Click on **Edit Prompt Values**, then wait for the **Prompts** popup window to load.

c. For 'Select Provider(s)' field, select your shelter provider by searching the provider ID or name

Then click on 'Run' [Run]

8. Click on the home icon to return to the home page

Find the completed **Bookend Data Quality Report** in the **Instances** folder or **BI Inox**. Click on the name of the report to initiate the download.

ADD MISSING ENTRIES

1. Open the downloaded the **Bookend Data Quality Report** that you just ran for your shelter provider(s)

2. Find the **Clients Needing Entries** tab, you will need to create an entry for every client showing up on this tab.

3. ⭐ Click on **Enter Data As** and select the correct shelter provider from the pop-up menu.

4. Open each client record in **ClientPoint**, and **add an Entry** under the **Entry/Exit** tab

   a. The Entry Date should match the Service Start Date, and change the time to 3:00:00 PM

   b. Scroll through the **HUD: ESG Entry for SO and ES assessment** and make sure all the data is up to date. Pay attention particularly to the two data elements below.

   c. Make sure that the **Relationship to Head of Household** field says 'Self (Head of Household'

   d. If the **Date of Birth** is already filled out, make sure the **Date of Birth Type** says 'Full DOB Reported'

| Date of Birth | 05 / 04 / 1974 |
| Date of Birth Type | ➡ Full DOB Reported (HUD) |

e. Make sure the **Client Location** field says 'MN-500 Hennepin'.

| Client Location | MN-500 Hennepin ⌄ G |

f. Click on **Save and Exit**. The entry you just added should show up at the top of the Entry/Exit list.

Entry / Exit

Program	Type	Project Start Date	Exit Date
Institute for Community Alliances (ICA) (1)	HUD	✏ 08/15/2022	✏

ADDING MISSING EXITS

1. Go to the **Clients Needing Exits** tab in the **Bookend Data Quality Report**. All clients showing on this tab is missing a **Project Exit**.

2. ⭐ Click on **Enter Data As** and select the correct shelter provider from the pop-up menu.

3. Open each **ClientPoint** record, find the appropriate open shelter entry under the **Entry/Exit** tab.

Entry / Exit

Program	Type	Project Start Date	Exit Date
Institute for Community Alliances (ICA) (1)	HUD	✏ 08/15/2022	✏

4. Add an Exit Date that macthes the Last Service End Date in the report.

Last Service End Date
9/28/2022

a. Enter the **Destination**. If you aren't sure where they exited to, enter 'No Exit Interview Completed'

| Destination * | -Select- |

b. Go through the **HUD: ESG Exit assessment** and make updates as needed. Click on **Save and Exit** to finish adding the program exit.