Accessing and Utilizing ESG CAPER and COC APR Reports - Work Instructions

1.0 Overview

Work instructions for accessing and utilizing ESG CAPER and COC APR reports.

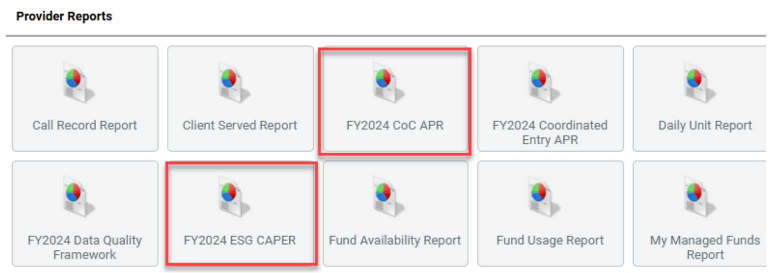
2.0 Work Instructions

1. **Navigating to Reports**
   a. From the main menu on the left, click on "Reports".
   b. Select the specific report you want to run, such as the FY2024 CoC APR or FY2024 ESG CAPER.

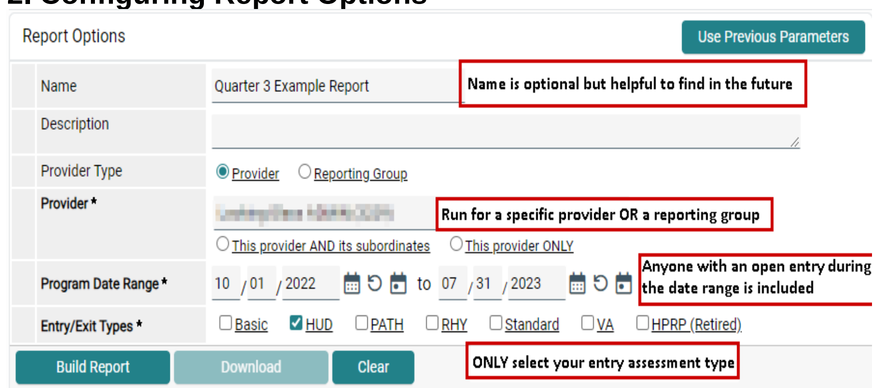
2. **Configuring Report Options**
   a. Name your report for easy identification in the future. Choose whether the report is for a "Provider" or a "Reporting Group".
   b. Set the "Program Date Range" and "Entry/Exit Types" that apply to your data needs.

   To see who is currently active in your program at the moment, you can set both your start and end date to the current date (Example: If today= 01/01/2025, then Start Date = 01/01/2025, End Date =01/01/2025).

1. Navigating to Reports



2. Configuring Report Options



3. Data Quality Check

a. Review sections 6a, 6b, and 6c to ensure all necessary data elements are accurately filled with zero errors.

b. Focus on personally identifiable information in Section 6a, verify universal data elements:

- Veteran Status.
- Relationship to Head of Household in Section 6b.
- Income and housing data quality in Section 6c.

3. Data Quality Check

6a - Data Quality: Personally Identifiable Information

Everything in GREEN must be 0 (zero)

Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name (3.1)	0	0	0	0	0%
SSN (3.2)	1	0	0	1	20%
Date of Birth (3.3)	0	0	0	0	0%
Race/Ethnicity (3.04)	0	0		0	0%
Gender (3.6)	0	0		0	0%
Overall Score				1	20%

6b - Data Quality: Universal Data Elements

Everything in GREEN must be 0 (zero)

Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Veteran Status (3.7)	0	0	0	0	0%
Project Start Date (3.10)			0	0	0%
Relationship to Head of Household (3.15)		0	0	0	0%
Enrollment CoC (3.16)		0	0	0	0%
Disabling Condition (3.8)	0	0	0	0	0%

6c - Data Quality: Income and Housing Data Quality

Everything in YELLOW must be 0 (zero)
IF you collect Income Information

Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Destination (3.12)	0	0		0	0%
Income and Sources (4.2) at Start	0	0	0	0	0%
Income and Sources (4.2) at Annual Assessment	0	0	0	0	0%
Income and Sources (4.2) at Exit	0	0	0	0	0%

3.0 Section Information

3.1 Section 4a

- This section includes information about the project that was entered by Clackamas County during project setup.
- If you are running the report for a reporting group, all included projects will be listed here.

3.2 Section 5a

- This section displays the number of people served during your selected date range.
- **Note**: The data is accurate only if there are no errors in Sections 6a and 6b. For example, the count of adults is accurate only if there are no missing dates of birth in Section 6a.

3.3 Section 6a: Data Quality for Personally Identifiable Information

- Ensure no client is listed as "Unknown" or "Refused" for required information like names or dates of birth.
- The "Information Missing" column should have zero errors. An error here indicates incomplete data for names, social security numbers (SSNs), or dates of birth (DOB).
- Name errors occur if only a partial name is provided. Ensure clients provide a complete first and last name.
- The selected data issue should best or most accurately describe the data issue for the SSN, such as 'Partial SSN given' if only the last four digits were collected.
- Approximate or partial dates of birth are considered errors.

3.4 Section 6b: Universal Data Elements

- Verify all adults have reported their Veteran Status correctly. Any errors can be fixed via the Profile Tab.
- Relationship to Head of Household must be accurately reported for each household. Errors here must be fixed.
- Ensure the Enrollment CoC is correctly listed as OR-507 Clackamas County, regardless of where the participant is staying.
- Report any discrepancies in the disabling condition data. Errors must be resolved unless the client has refused to provide information.

3.5 Section 6c: Income and Housing Data Quality

- Focus on ensuring that all income data matches across assessments. Discrepancies in income reporting at any stage (start, annual assessment, exit) are considered errors and must be corrected.

- Errors in 6c: Income and Sources (4.2) at Annual Assessment may indicate that the participant is missing or overdue for an annual assessment.

3.6 Section 7a: Number of Persons Served & 8a: Number of Households Served

- These sections show the total number of participants or households served, including those who moved into permanent housing. See bottom row: “For PSH and RRH - the total persons served who moved into housing” for this data.

3.7 Section 15: Prior Living Situation

- This section should reflect where the client was living the night before entering your project.
- It's crucial to ensure this information is accurate to meet project eligibility requirements based on living situations or homelessness.

3.8 Section 16: Cash Income - Ranges

- Use the following two rows to identify participants in need of Annual Assessment
  - Number of adult stayers not yet required to have an annual assessment
  - Number of adult stayers without required annual assessment

3.8 Section 23c: Destination

- This section records the client's destination upon exiting the project.
  - Compare this data with the Prior Living Situation to analyze housing outcomes.

4.0 Resources

4.1 Referenced Material

- HUD APR Guides, Tools, and Webinars for CoC Grant-Funded Programs

4.2 Related Material

- CoC APR and ESG CAPER HMIS Programming Specifications
- HMIS Data Standards

4.3 Contacts

- HMISAdmin@clackamas.us