MAINTENANCE AND DATA CLEANING FOR DCA SUBGRANTEES

I. Regular Data Maintenance

A. Reimbursement Request

Check that the following data are complete and/or updated for heads of households:

- Pathways Authorization
- Housing Status is Literally Homeless, Housed and at risk or Housed and at imminent risk of losing housing
- HPRP Services are recorded after HPRP Program enrollment date
- HPRP Case Management service recorded in current quarter
- Income for household entered in Finance tab
- Barriers to Housing Stability form saved and completed in Assessment tab
- Current Client Status and Goals under Progress tab updated in current quarter

B. Clients entered into Pathways who are not eligible for HPRP should be discharged from the program. Then delete the program and service records for that client. (Call Christy Hahn for assistance 678.642.3164)

C. If you realize a service was not recorded before a client was discharged, go into the client's program record and delete the Program Exit Date. Add the missing service to the client record and then discharge the client from the program again starting from the Client Search page.

II. How to Run Data Exports For QPR and Data Entry Quality

1. Log into Pathways.

2. In the top left corner, click on Reports.

3. You will then see a gray menu marked Reports on the left side. Click on Data Export.

4. From the Categories drop down menu select HPRP.

5. From the Reports drop down menu select which report to run:
    a. QPR Data for Services (2QA) **OR**
    b. QPR Data for Destinations (2QB) **OR**
    c. Program Monitoring Export

6. Enter Begin Date and End Date for report you wish to run.

7. Click RUN.

Your data export will appear in CSV form in a new window.

<u>III. Data Cleaning</u>

<u>A. Run Data Export for Services 2QA Export</u>

(NOTE: Clients may appear in export more than once. If your agency has more than one HPRP program, sort your data export according to Program name or Funding source.)

1. Counted in 2QA (QPR)

The column on the far right of the data export will show a “Y” if that client is counted in the QPR. If an “N” appears troubleshoot as follows.

2. Service Outcomes

- Change all “Pending” services to services “Provided” in client record if client received service.
- Change all “Not Provided” services to services “Provided” in client record if client received service.
- If client was deemed ineligible for program, but left in system--discharge from program, delete program and services.
- If services were not approved for client--change outcome to “Not Provided”

3. Housing Status

- Members of the same household should have the same housing status.
- Look for missing housing status or a housing status of Don’t Know or Refused. (Stably Housed will appear under Prevention in the QPR.)
- Collect accurate housing status from client or Head of Household if client is a household member.
- To correct housing status at program enrollment, discharge client from program, delete program record and re-enroll client into HPRP with correct Housing Status, County, and Program Entry Date (This cannot be changed by editing the housing status on the Client General Information page.)

4. Invalid program name

- Look for records in the spreadsheet with an invalid program name. An invalid program name may be due to program enrollments and service records from multiple agencies. Contact Christy Hahn (678.642.3164) for assistance.

5. Household members

- Make sure the household members listed are accurate.
- If household member should be removed, go into client record and edit under Household tab.
- If a household member is missing from the export, add member to household from the Client Search page.
- All household members must be enrolled in the HPRP program.
- Program enrollment dates, county, and housing status should be the same for all household members.

6. Services

- For data entered before January 15, 2010 make sure that service dates occur on the same day or after the program enrollment date.
- If this occurs--change the program enrollment date to the date of the first service.
- Do not backdate a service transaction to a date before program enrollment.

- Ensure all financial services have a dollar amount listed.

7. Leavers

- Look for clients who have left the program--client records with program exit dates and destinations can be checked against client list in 2QB. If there are clients in 2QA and not 2QB, find out if client was eligible for services.

B. Run Data for Destinations 2QB Export
(NOTE: Only clients who exited the program will appear in this export, however clients may appear in export more than once. If your agency has more than one HPRP program, sort your data export according to Program name.)

1. Showing up in 2QB (QPR)

- The last column on the right of the data export will show a "Y" if that client is being picked up by the QPR. If an "N" appears continue to troubleshoot using steps 2-6 as in 2QA.

2. Ensure that all clients have a destination.

3. Ensure consistency with discharge spreadsheet. (submitted to HPRP Coordinator)

- Make sure that clients in Pathways 2QB export match clients submitted to DCA HPRP Program Coordinator at end of each quarter.

3. Program dates

- Ensure that Program *enrollment* date is not the same as program *exit* date. If they are the same, determine if the client should be enrolled in the program. If not, delete the client's HPRP program and relevant services.

C. HPRP Program Monitoring Export
(NOTE: Clients should only appear in this export once. If a client is listed more than once there may be a duplicate record or double enrollment.)

1. Check for missing County at program enrollment.

- County can be captured by discharging a client, deleting the old program and re-enrolling them with the correct county, housing status and program enrollment date.

2. Ensure an assessment is complete for each Head of Household.

- If a cell in that column is blank go back to client record to save and complete Barriers to Housing Stability Assessment.

3. Ensure a case management service has been recorded for the present quarter.

- The column will show the last date a case management service was recorded.

4. Ensure Progress tab is up-to-date.

The last 2 columns on the right will show the last date that Client Goals and Client Current Status fields were updated.

For additional assistance contact Christy Hahn at 678.642.3164 or Christy.hahn@pcni.org.