Data Quality Clean Up:

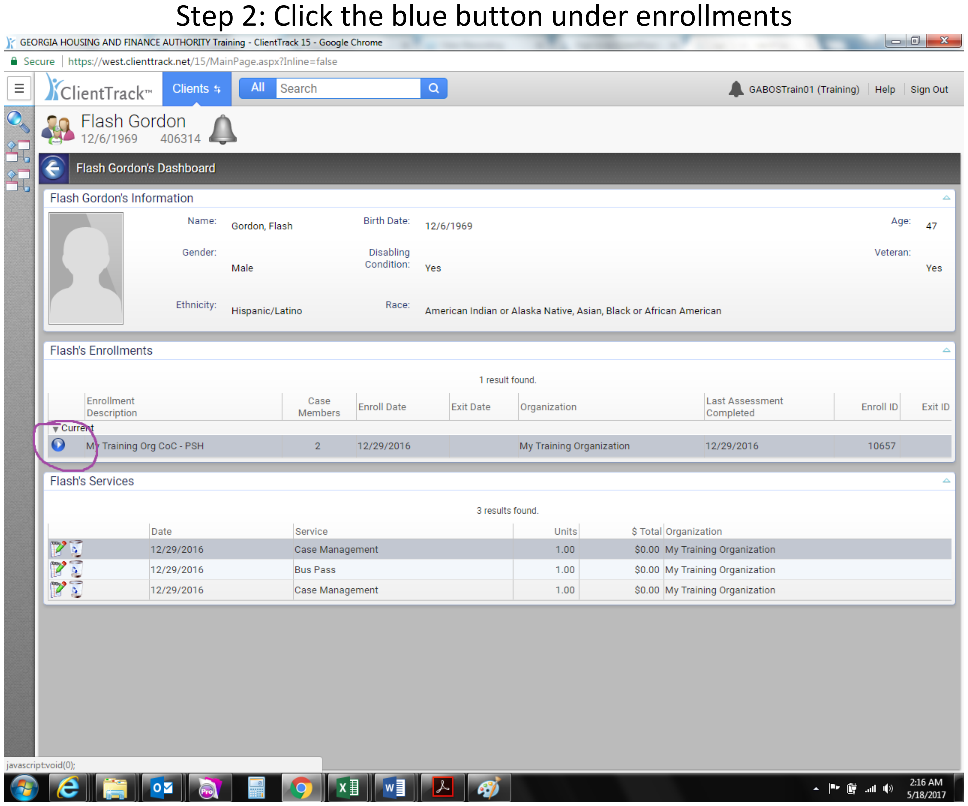
Q4. Income and Housing Data Quality: Income and Sources at Annual Assessment

REMEMBER! When doing the missing annual assessment information, you will need to date the information to correspond to the project entry date. It should be that date, combined with the correct year for your operating year for your APR. If the resident entered the program between May and December of any year, you would put 2016 as the year for the assessment you are doing for this data clean up. If they moved in between January and April, you would use 2017 as the assessment year for the assessment you are doing for this data clean up. That will effect change on your data quality report. Remember to do one, refresh your Data Quality report and see if the numbers are going down.

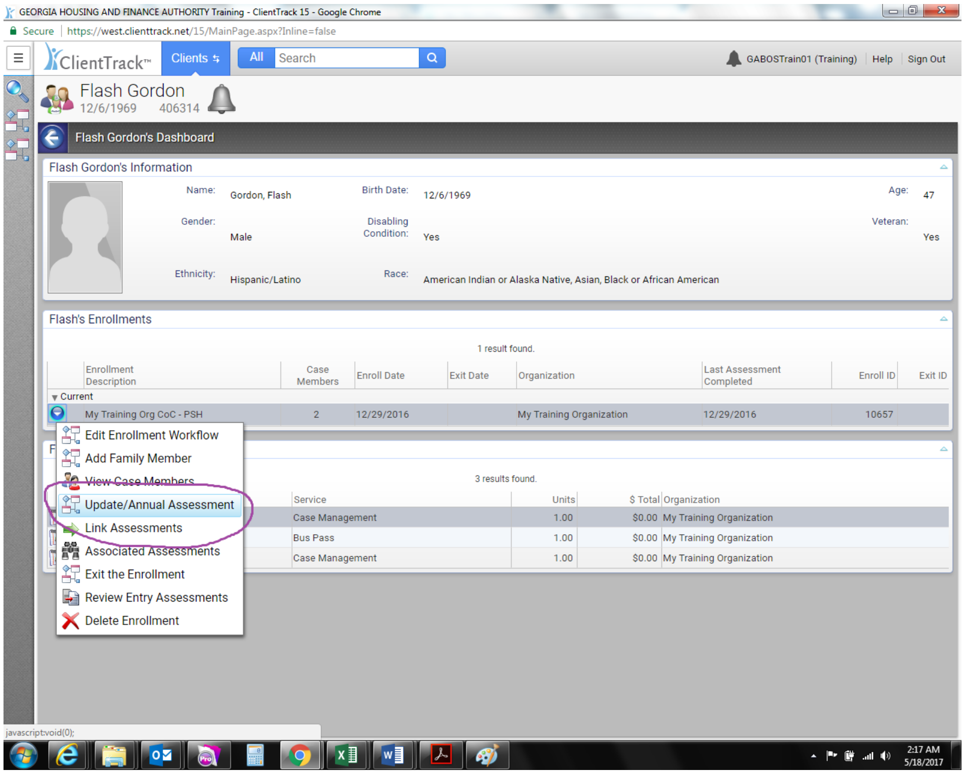
To complete these updates, you will need to run your Data Quality Detail Report and open the export title "Data DQ 4 (validation only)". This spreadsheet will detail what residents will need to have an annual assessment done. From there, you will utilize the client ID or their name to find their record in ClientTrack.

Step 1: Search and find the client who is missing an annual assessment.

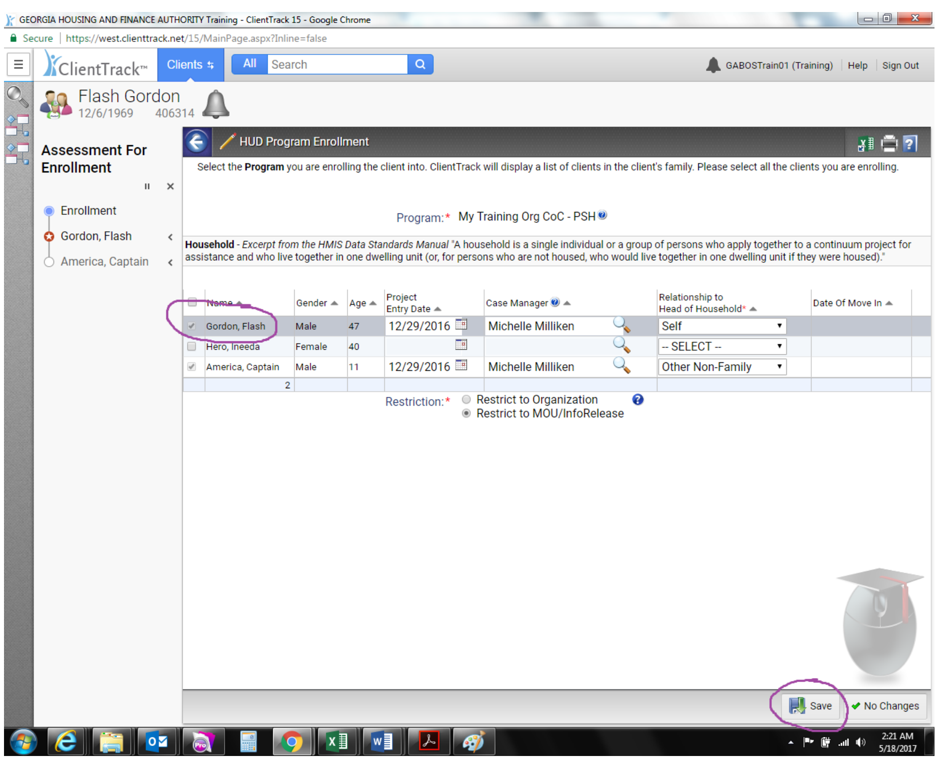
Step 2: Click the blue button under enrollments



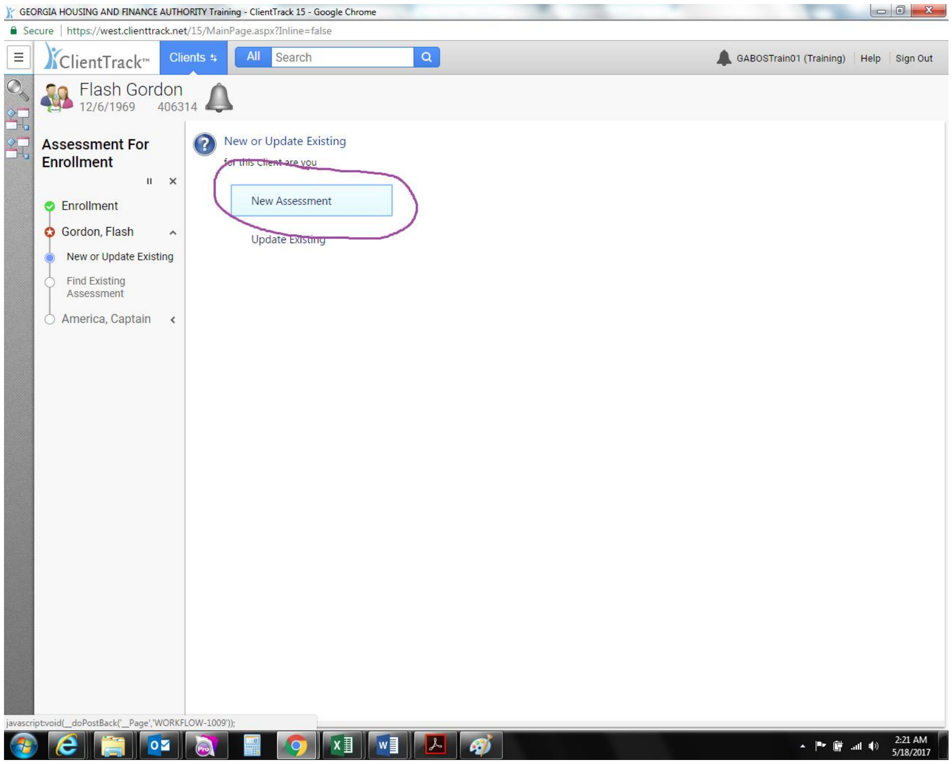
Step 3: On the drop-down menu choose Update/Annual Assessment



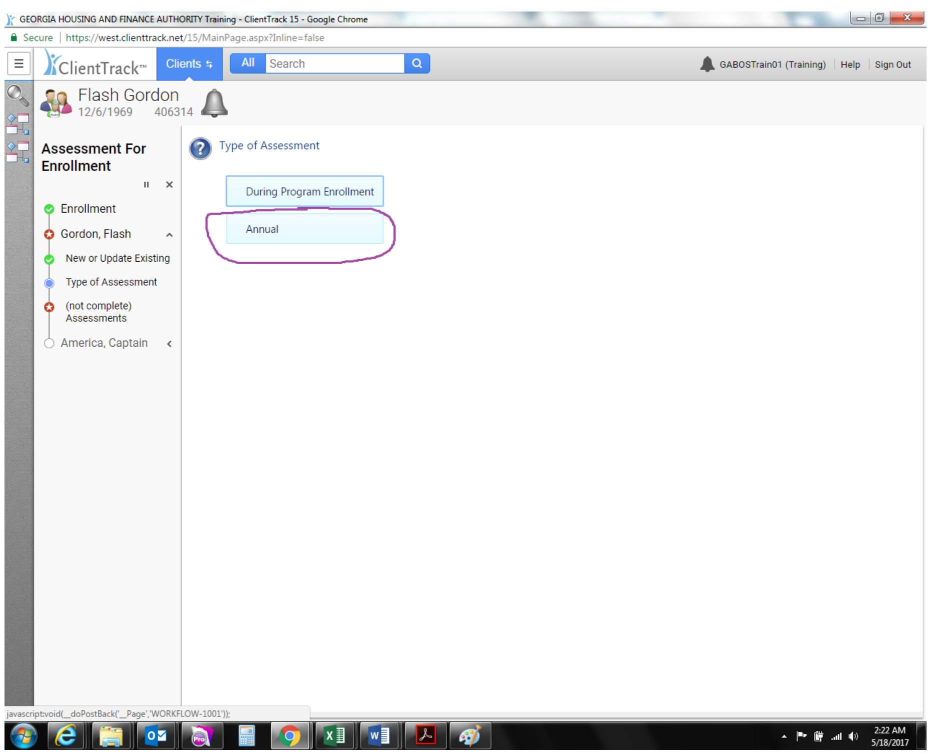
Step 4: Check/confirm which client this assessment will be for and click save



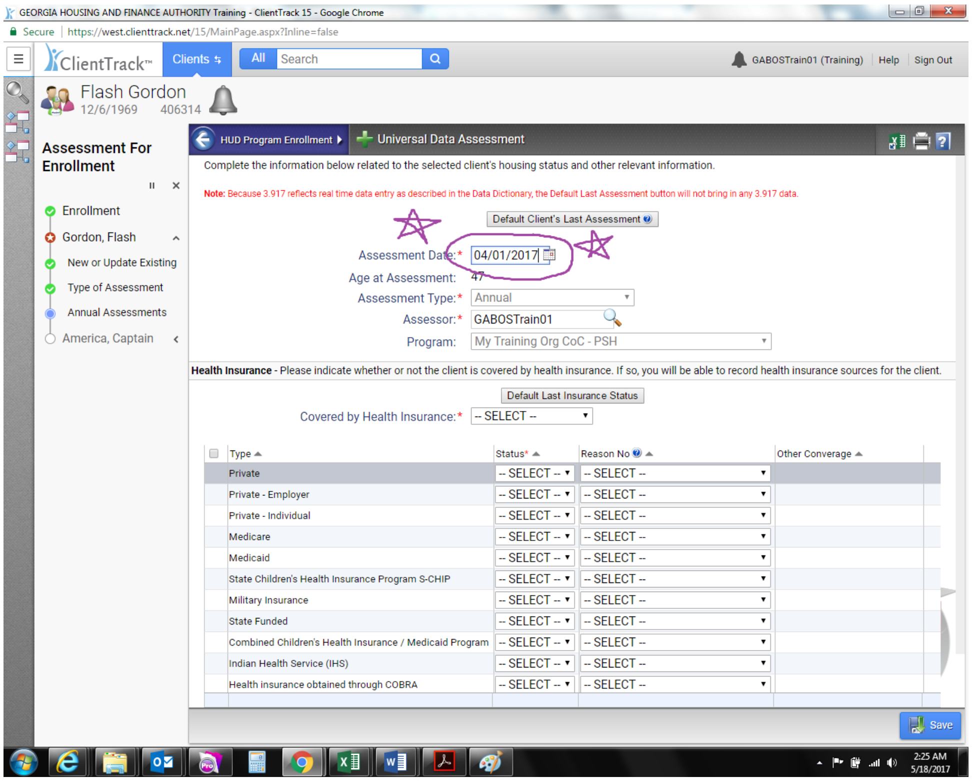
Step 5: Choose NEW ASSESSMENT



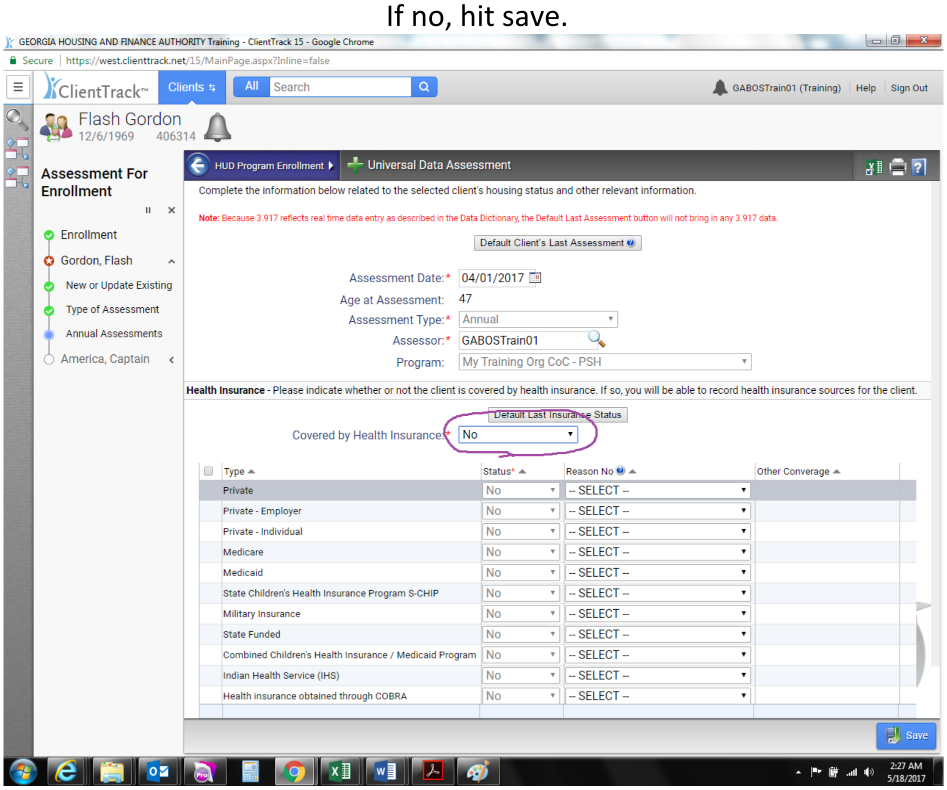
Step 6: Choose ANNUAL ASSESSMENT



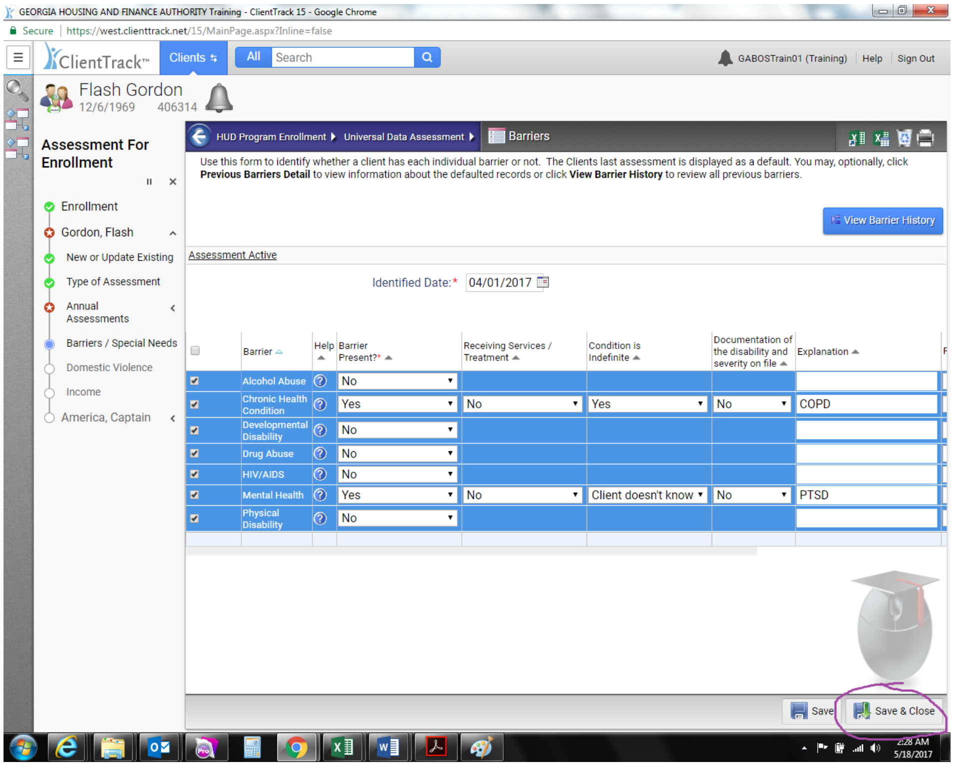
Step 7: REMEMBER! This is where you enter the project entry date and then year based on month (see above)



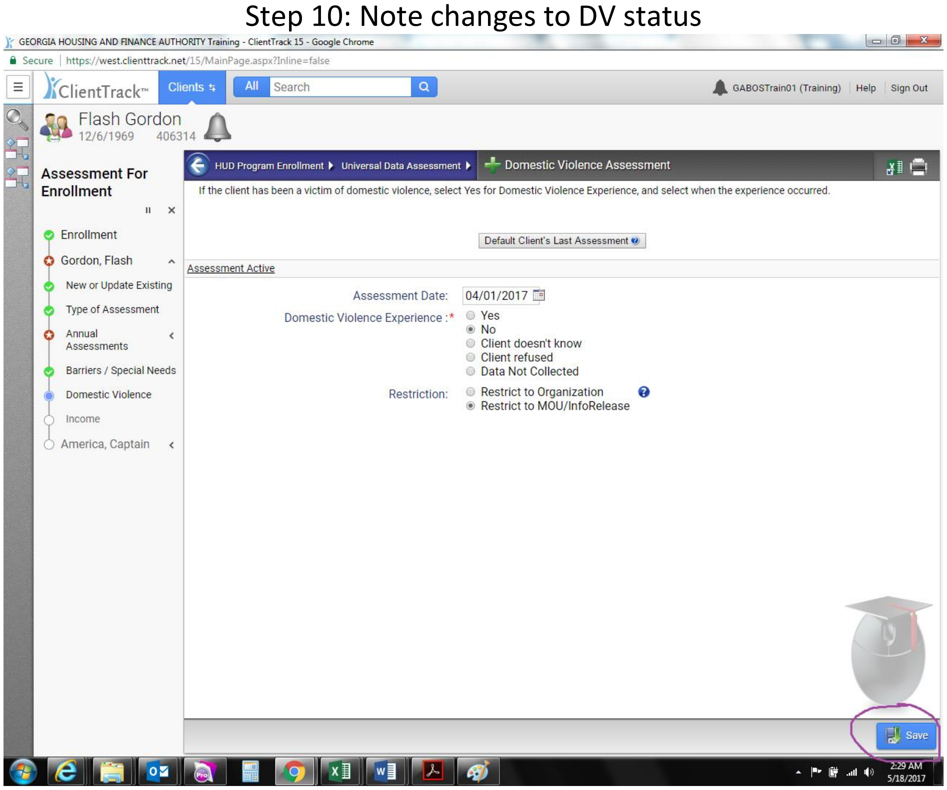
Step 8: Answer if client is covered by health insurance. If yes, give details, hit save. If no, hit save.



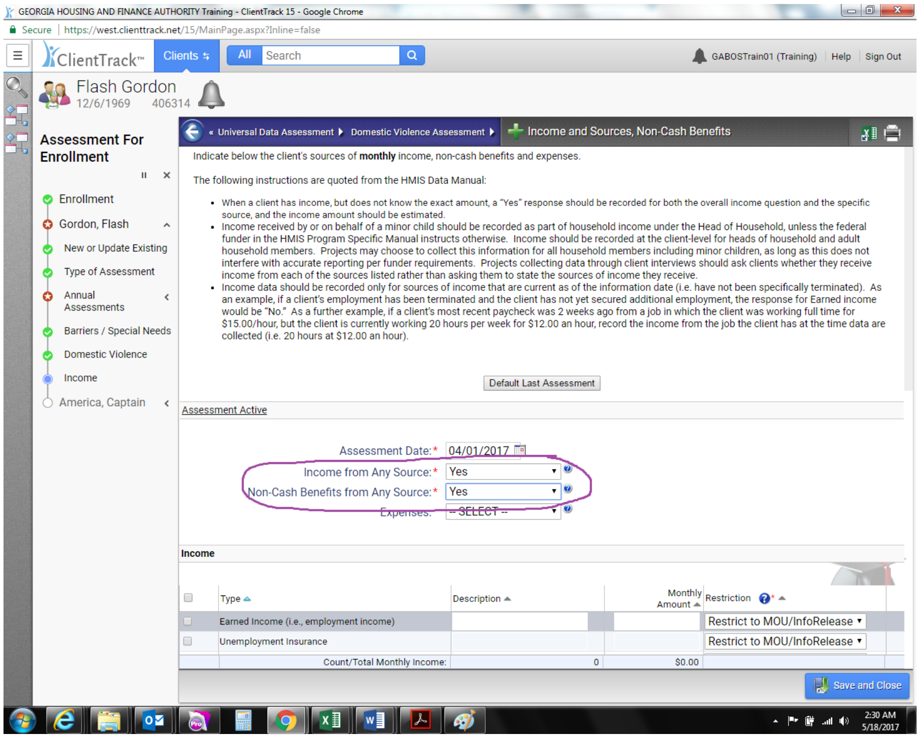
Step 9: Confirm if any barriers have changes within the year. Hit save and close.



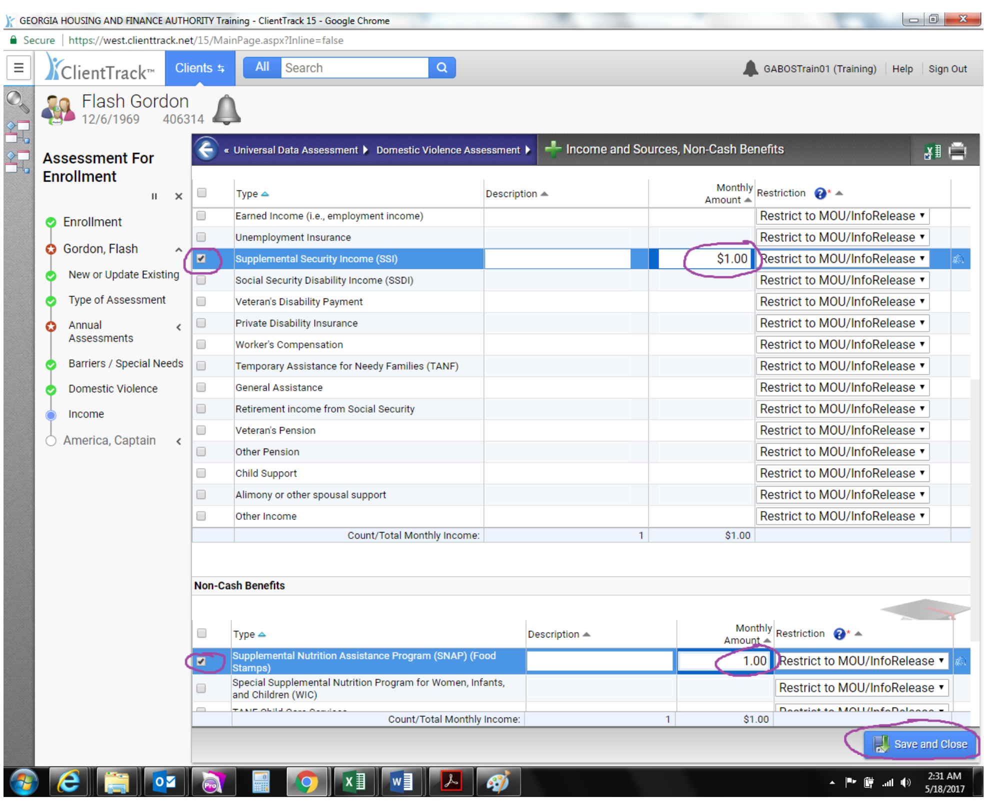
Step 10: Note changes to DV status



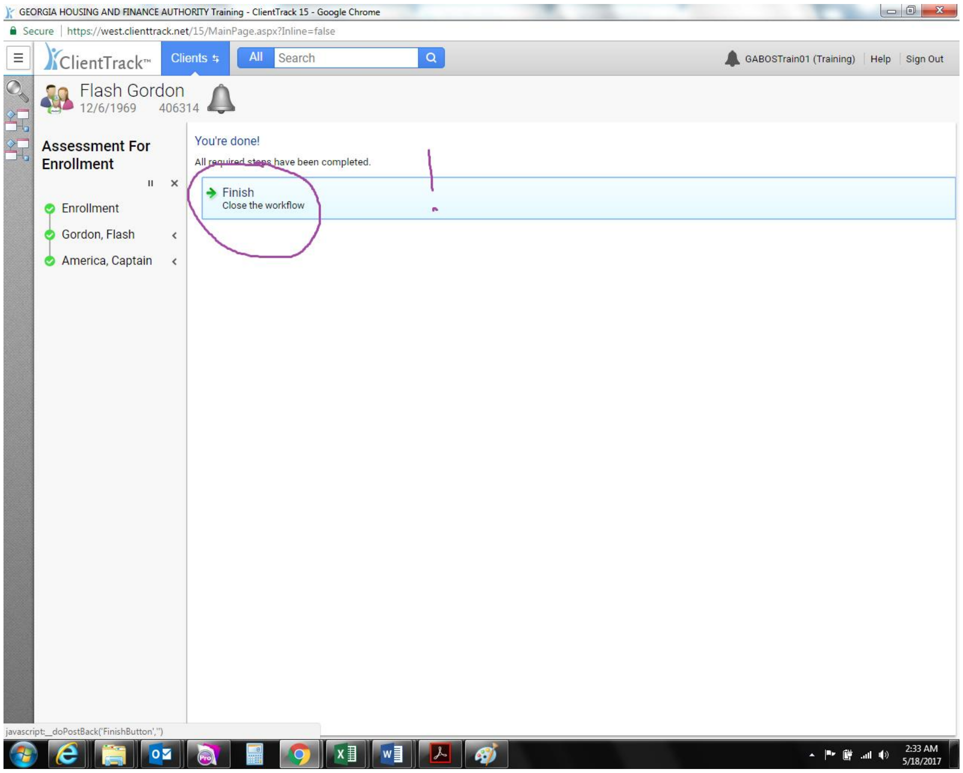
Step 11: Enter Income-this includes cash and non-cash.



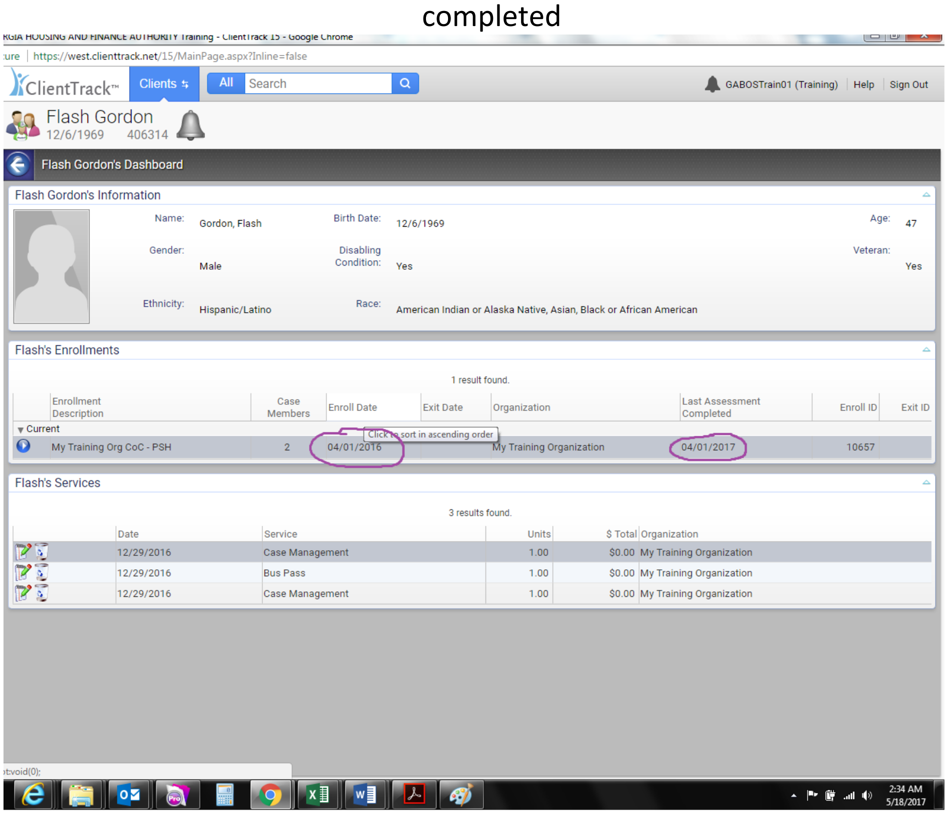
Step 12: If you answered yes, enter amounts/types into cash and/or non-cash. Hit save and close. If you answered no, skip entering additional data and hit save and close.



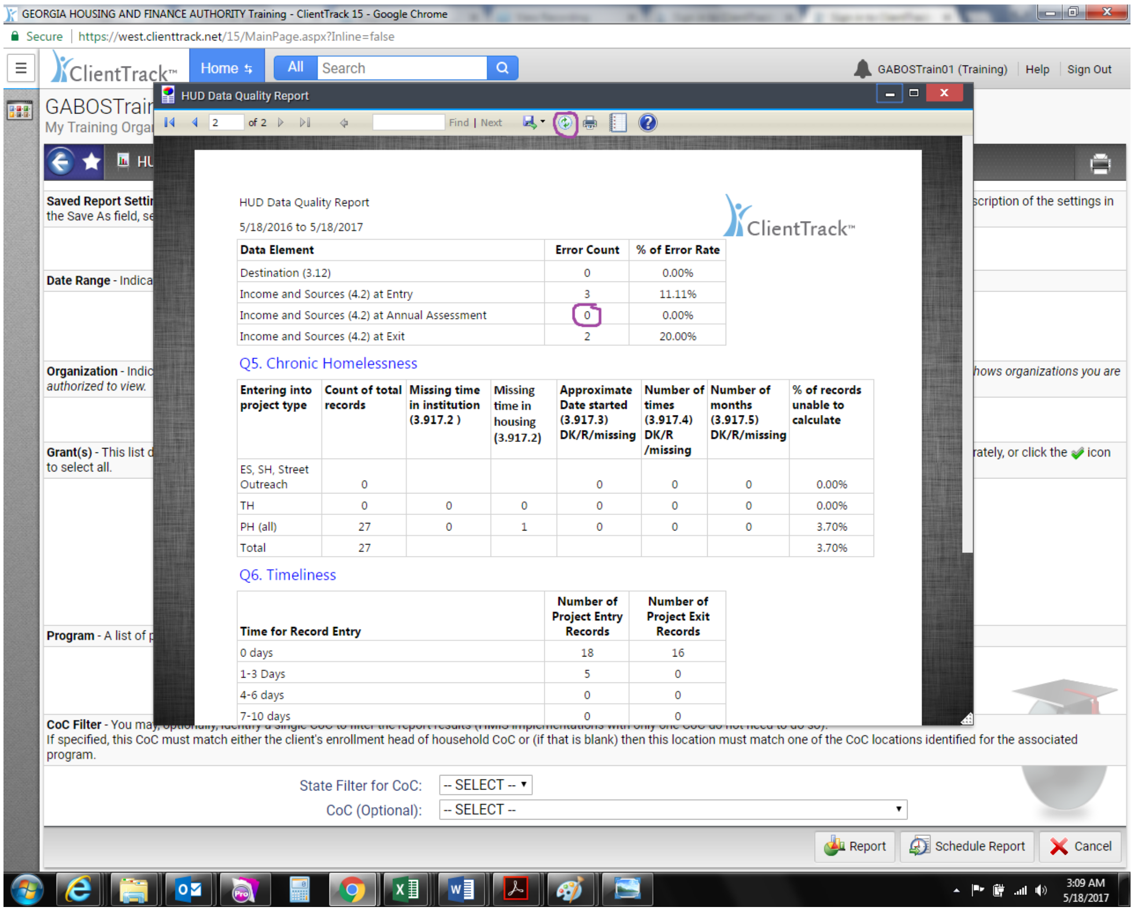
Step 13: When you reach this page, you will know you have entered everything as it should be. Hit Finish to close the workflow.



Step 14: You will be returned to the dashboard and you will look to confirm the last assessment completed



Step 15: Return to your Data Quality report (that you hid) and hit the refresh button to confirm the number of errors has decreased



Continue this process until the error count reaches zero.