PRIORITY LIST UPDATES

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PROJECT SUMMARY

The ICA Reporting Team took on intensive quality assurance of the twelve Minnesota Priority Lists totaling 300 hours across 3 team members. Recognizing the importance of these reports in helping determine clients' referrals to housing, the Reporting Team strived to push the set of Priority Lists through a standardized testing plan to confirm no client was put at disadvantage due to reporting bugs.

What we found: All clients added to the CoC's Priority List following proper workflow displayed on at least one tab of each Priority List. We did find that in circumstances where clients had multiple workflow errors, the clients were more likely to show up on the Full Clients/All Clients/All Referrals tab of the Priority List, but not able to be sorted on the Housing Program tabs. Additionally, a small number of clients displayed different scores on the various Housing Program tabs.

What we did: Since incorporating all possible workflow errors into the report logic would fundamentally alter the report integrity/simplicity of Priority List design, **we built an Errors tab** to make more visible which clients have an

issue in their profile that could be impacting their prioritization. **We also edited logic in the VI-SPDAT variables** so clients' scores are consistent throughout the report.

PROJECT DETAILS

The Priority List Quality Assurance project focused on a) incorporating the Housing Move-In Date data element into the twelve Minnesota Priority List reports and b) testing each Priority List to ensure core functionality.

1. **Housing Move-In Date Changes**: The HUD 2017 Data Standards notes the distinction between Project Entry Date and Housing Move-In Date for Permanent Housing programs. Since the Priority Lists previously did not make this distinction (the majority were built prior to the 10/1/17 changes), we developed complex variables to pull clients' Housing Move-In Dates into the report. With this feature, Priority List Managers can distinguish between those clients with accepted referrals who have not been housed yet, and those who have been housed.

2. **Priority List Quality Assurance Testing**: Since December 2017, ICA has been in the process of building and adding updates to twelve Priority Lists for the 10 CoCs in Minnesota. Due to different workflows in the HMIS and on-the-ground processes, each Priority List report is slightly different. Quality assurance testing focused on ensuring all clients added to the CoC's Priority List display on the different tabs of the Priority List reports. Additionally, ICA ensured VI-SPDAT scores (due to the high complexity of reporting on this score) were consistent across the different tabs of the Priority List reports.

PROJECT PROCESS

The project required approximately 300 hours of three reporting team members from March to June 2018. The majority (240 hours) was spent editing and testing twelve Priority Lists.

| Project Component	Timeline
Building and incorporating complex Housing Move-In and Project Entry Date variables into Standard Entry Exit and Referral Workflow Priority Lists	March – April 2018
Develop Step-by-Step Edit Instructions and Testing Plan	May 2018
QA the Standard Entry Exit and Referral Workflow Priority Lists and make edits/additions to Step by Step Instructions as needed	May 2018
Edit 12 Priority Lists to incorporate set of edits outlined in the Step-by-Step Instructions	May – June 2018
QA 12 Priority Lists to ensure core functionality	May – June 2018

LEARNING

The Priority List reports in ART are intricately layered with complex variables and queries. What may appear to be simple additions to the viewer take multiple hours to develop and test for functionality in the backend. With a Priority List Testing Plan developed, we can now ensure that each future edit to the Priority List undergoes this standardized testing process.

The following sections describe changes to the Priority Lists that are visible to the viewer. Note, due to differences in CoC Priority Lists, *we have only listed common changes from report to report in the description below*.

Some local changes were incorporated on a request basis. Please reach out to your Regional System Administrator if you have any questions regarding specific local changes not documented in this guide.

WHERE ARE MY REPORTS?

We have moved all Priority Lists to the Coordinated Entry folder in the SSA Report Gallery.
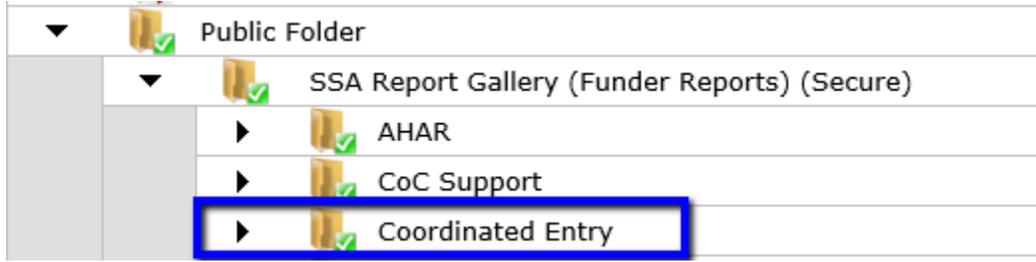
WHY DID THE REPORTS MOVE?

Reports in the SSA Report Gallery are secure – only ICA staff members with ad-hoc licenses can make edits to reports in this folder. All other users with ad-hoc licenses are required to make copies of the reports before making edits. This allows us at ICA maintain a revision control and prevents accidental edits and changes to the highly complex reports. You are free to copy reports into your CoC folder for any specific edits, but you will be responsible for your edits.

REFERRAL WORKFLOW: PRIORITY LIST CHANGES

The following changes are applicable to the **SMAC, Ramsey, Central, Northwest, West Central, Southeast, and Southwest CoCs**. If your CoC uses the Entry/Exit workflow, keep scrolling to find changes applicable to you.

HOUSING MOVE-IN DATE

We incorporated the Housing Move-In Date data element into your Priority Lists. Housing Move-In Date indicates the date that a household admitted into a Permanent Housing project moves into housing.

You will notice that the Accepted Tab is now split into the **Accepted & Housed** and **Accepted & Not Housed** tabs.
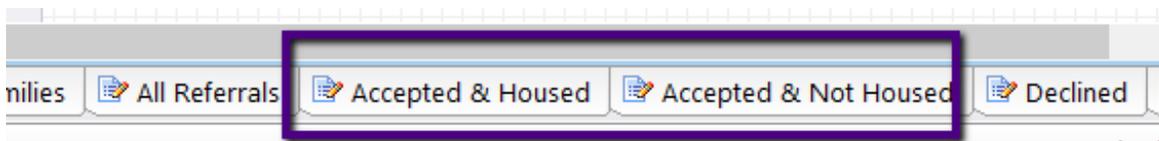
The **Accepted & Housed** tab pulls in all clients with an Accepted Referral Outcome and a valid Date Housed.

Report Section	Accepted & Housed										
Report accurate as of:	Jun 15, 2018 12:00:00 AM										
How is this list pulling?	This list pulls all clients with an "Accepted" Service Refer Outcome and a valid Date Housed (E/E or sub).										
How is this list sorting clients?	This list sorts by days from list to housed in ascending order.										
Client ID 60	Service Provider Accepting Referral	Provider DQ Check	Date Referred to List	Date Provisionally Accepted	Project Start Date (most recent)	E/E Provider (most recent)	Project Type	Housing Move-In Date (E/E)	Date Housed (E/E or Sub)	Days from List to Housed	Days from Accepted to Housed

The **Accepted & Not Housed** tab pull in all clients with an Accepted Referral Outcome and NO valid Date Housed.

Report Section	Accepted and Not Housed							
Report accurate as of:	Jun 15, 2018 12:00:00 AM							
How is this list pulling?	This list pulls all clients with an "Accepted" Service Refer Outcome and NO valid Date Housed (E/E or sub).							
How is this list sorting clients?	This list sorts by days since provisional acceptance in descending order.							
Client ID 44	Service Provider Accepting Referral	Provider DQ Check	Date Referred to List	Date Provisionally Accepted	Project Start Date (most recent)	E/E Provider (most recent)	Project Type	Days Since Provisional Acceptance

NEW COLUMNS DEFINED

Column Name	Definition
Project Start Date (most recent)	This column pulls the client's most recent Permanent Housing or Transitional Housing Entry/Exit Project Start Date following the date the client was added to the Priority List.
E/E Provider (most recent)	This column pulls the client's most recent Permanent Housing or Transitional Housing Entry/Exit Provider following the date the client was added to the Priority List.
Project Type (most recent)	This column pulls the project type associated with the client's most recent Permanent Housing or Transitional Housing Entry/Exit following the date the client was added to the Priority List.
Housing Move-In Date (E/E)	The Housing Move-In Date associated with the client's most recent Permanent Housing Entry/Exit following the date the client was added to the Priority List.
Date Housed (E/E or Sub)	The more recent of these two dates: a) The Housing Move-In Date associated with the client's most Permanent Housing Entry/Exit following the date the client was added to the Priority List.

| | b) The most recent Date Housed entered in the client's Date Tracking sub-assessment.

Note, even though not all CoCs are using the Date Tracking sub-assessment, the field has been factored into the calculation for historical purposes. |
|---|---|
| Days Since Provisional Acceptance | This column calculates and displays the days between the Service Start Date of the accepted referral and the Effective Date entered in the Report Prompt. |
| Days from List to Housed | This column calculates and displays the days between the Service Refer Date (the date the client was added to the Priority List) and the Date Housed (E/E or Sub) field. |
| Days from Accepted to Housed | This column calculates and displays the days between the Service Start Date of the accepted referral and the Date Housed (E/E or Sub) field. |

NEW COUNTS

On the Summary tab, we included a count of clients with Accepted referrals who have been housed, and a count of those of have not yet been housed.

For client details, check out the Accepted & Housed and Accepted & Not Housed tabs.

Report Section	Summary
Report accurate as of:	Jun 15, 2018 12:00:00 AM
Confidentiality Statement	All personally identifiable information contained in this report is considered privileged and confidential information. By accessing or downloading this report, you are accepting responsibility for the privacy and security of all information contained within this report.

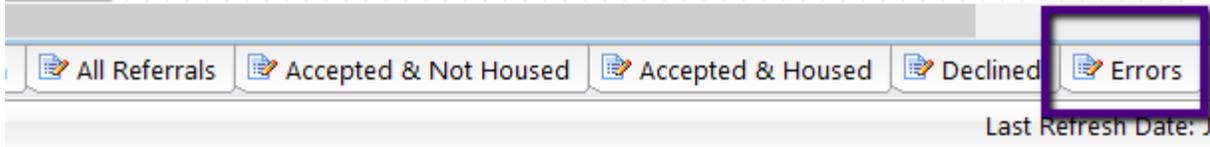|							
Clients on Current Priority List	Total number of clients being considered for housing (includes active and inactive clients).	218		VI-SPDAT Score Range	Total Clients on Priority	Average Length of Time on List	
Clients Accepted from Priority List	Total number of clients with accepted housing referrals.	180		0 - 3	4	~132 days	
Clients Removed from Priority List	Total number of clients with declined/ cancelled housing referrals.	69		>11	36	~170 days	
				4 - 7	84	~173 days	
Average Length of Time on Current Priority List	Average length of time for clients currently being considered for housing ((includes inactive and active clients). currently being considered for housing.	~172 days		8 - 11	93	~175 days	
				Missing	1	~42 days	
Longest Length of Time on List	This longest period of time a client currently being considered for housing (includes inactive and active clients) has been on the list.	724					

Clients with Accepted Housing Referrals & Not Housed	46
Clients with Accepted Housing Referrals & Housed	134

Clients with Error may not display on the Housing Program Tabs! Check Error Tab for details.

ERRORS TAB

We added an Errors Tab to help you maintain your Priority List. This is a critical new feature to ensure clients are prioritized appropriately and not missed due to data entry errors. This list pulls clients with missing VI-SPDAT scores, issues with their VI-SPDAT score (due to workflow errors), clients with multiple referrals to the Priority List, and clients with missing answers to Residence Prior to Project Entry (the report is unable to calculate Chronic Homeless and HUD Homeless status without this information).

The Errors tab also contains a helpful Error Key.

It is important to review the Errors tab on a routine basis since some clients on this tab may not be able to display on the Housing Program tabs.

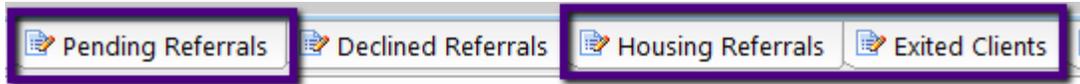The Error Table indicates why a client is displaying on the list below.

ENTRY/EXIT WORKFLOW: PRIORITY LIST CHANGES

The following changes are applicable to the **Hennepin, Saint Louis County, and Northeast CoCs**.

HOUSING MOVE-IN DATE

We incorporated the Housing Move-In Date data element into your Priority Lists. Housing Move-In Date indicates the date that a household admitted into a Permanent Housing project moves into housing.

You will notice new columns on the following tabs: **Pending Referrals**, **Housing Referrals**, and **Exited Clients**.

NEW COLUMNS DEFINED

Column Name	Definition
Project Start Date (most recent)	This column pulls the client's most recent Permanent Housing or Transitional Housing Entry/Exit Project Start Date following the date the client was added to the Priority List.

E/E Provider (most recent)	This column pulls the client's most recent Permanent Housing or Transitional Housing Entry/Exit Provider following the date the client was added to the Priority List.
Project Type (most recent)	This column pulls the project type associated with the client's most recent Permanent Housing or Transitional Housing Entry/Exit following the date the client was added to the Priority List.
Housing Move-In Date (E/E)	The Housing Move-In Date associated with the client's most Permanent Housing Entry/Exit following the date the client was added to the Priority List.
Date Housed (E/E or Sub)	The more recent of these two dates: a) The Housing Move-In Date associated with the client's most recent Permanent Housing Entry/Exit following the date the client was added to the Priority List. b) The most recent Date Housed entered in the client's Date Tracking sub-assessment. Note, even though not all CoCs are using the Date Tracking sub-assessment, the field has been factored into the calculation for historical purposes.
Days Since Provisional Acceptance	This column calculates and displays the days between the Service Start Date of the accepted housing referral and the Effective Date entered in the Report Prompt.
Days from List to Housed	This column calculates and displays the days between the Service Refer Date (the date the client was added to the Priority List) and the Date Housed (E/E or Sub) field.
Days from Accepted to Housed	This column calculates and displays the days between the Service Start Date of the accepted housing referral and the Date Housed (E/E or Sub) field.
Days on Priority List	This column calculates and displays the days between the client's Coordinated Assessment Entry Exit Start and End Date.

NEW COUNTS

On the Summary tab, we included a count of clients with Accepted referrals who have been housed, and a count of clients with closed Coordinated Assessment Entry Exits who have been housed.

Table 3a. Running count of housing referrals made to date.

Referral Outcome	Number of Referrals Made
Accepted	104
Declined	146
Missing	108
Total	**358**

Accepted Referral Details	Number of Referrals	Number of Clients
Accepted Referral & Housed NOTE: Clients without a referral marked "Accepted" are excluded from this count.	104	100
Closed CES E/E and Housed		101

ERRORS TAB

We added an Errors Tab to help you maintain your Priority List. This is a critical new feature to ensure clients are prioritized appropriately and not missed due to data entry errors. This List pulls clients, issues with their VI-SPDAT score (due to workflow errors), clients with multiple open coordinated assessment Entry Exits to the same Priority List, and clients with household data issues.

The first table is the Household Error table. The Error Key is located in the rightmost column in the second table.

Report Section	Errors
Report accurate as of	Jun 13, 2018 12:00:00 AM
How is this list pulling?	This list pulls clients who have identified errors in their record. The Error Key is located on the last column in the second table.
How is this list prioritizing clients?	All errors are identified in the last column of the report.

The following Client Ids households errors:
1. Check if there is a head of household identified for the group.
2. Check if non-head of household clients need to be exited.
3. Check if child only household is missing head of household.

Client ID	First Name	Last Name	EE Count	Inactive?	Referral Date	VI-SPDAT Score	Priority List Manager Notes	Assessor Notes	Assessment Date	Assessor Name	Assessor Organization	Date Added	Days on List	Error Key

PRIORITY LIST SUPPORT

Please contact the MN Helpdesk at mnhmis@icalliances.org with any questions regarding the changes described above. Thank you!