FFY 17 SPM DATA CORRECTIONS GUIDE

Error	Data Correction Instructions In most cases, these instructions should resolve error messages.

A1 Missing **Living Situation** (3.917)

A2 Missing **Relationship to Head of Household** (3.15) – Error or HoH Error Code

A3 Missing **Income from Any Source** (4.2)

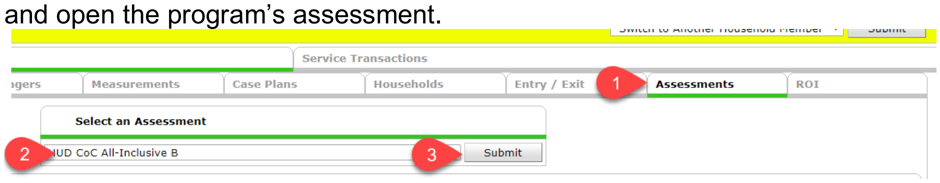
MISSING DATA

1. Enter EDA mode[1] to the correct project provider and go to the client's record.
2. In the Entry/Exit tab, click on the Edit pencil to the left of the Entry date to open the entry assessment. Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)
3. Respond to the missing data element(s).
4. Click on Save & Exit.

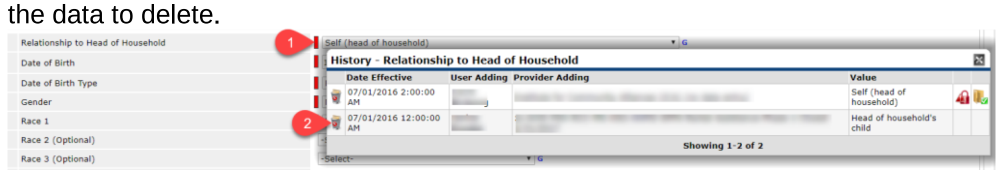
DELETING INCORRECT DATA

If you updated a data element with the correct answer, having had added an incorrect answer previously, you'll need to delete the incorrect answer so as not to confuse reports.

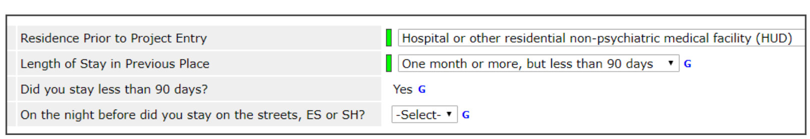
1. EDA to the provider that created the data. You can confirm which provider created the data element by clicking on the history bar and looking at the Provider Adding column.
2. Although there is more than one way to complete this, let's go to the Assessments tab and open the program's assessment.



3. Click on the history bar (may be red, brown, or green) to the left of the data element.
4. Click on the Trash Can. Note: You have to be in EDA mode to the provider that created the data to delete.



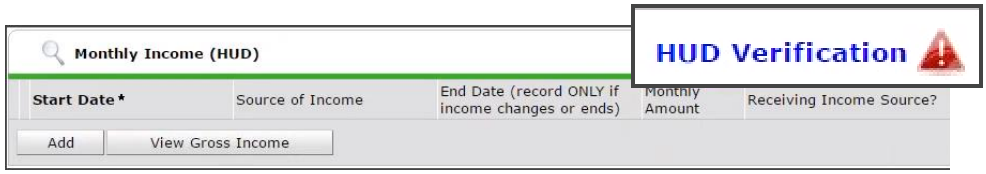
EXAMPLE: 3.917 LIVING SITUATION



Picture of the Living Situation Series (this series uses conditional logic, so may show more or less questions than the image below.

<table>
<tr>
<td>A4</td>
<td>Missing Monthly Income (4.2) (in the sub-assessment)</td>
<td>

1. Enter EDA mode[1] to the correct provider and go to the client’s record.
2. In the Entry/Exit tab, click on the Edit pencil to the left of the Entry date to open the entry assessment. Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)
    a. If your sub-assessment is empty (no rows in table) OR HUD Verification has a red triangle (incomplete), click on HUD Verification and complete the sub-assessment.



    b. Watch demonstrations on how to complete sub-assessments here (start at 3 minutes 30 seconds); the first demonstration will cover how to complete the Disabilities sub-assessment, while the second demonstration features the Monthly Income sub-assessment.

</td>
</tr>
<tr>
<td>A5</td>
<td>Incongruencies between Income from Any Source and Monthly Income (4.2) sub-assessments</td>
<td>

It is incongruent data if the “Income from any source?” data element is answered “Yes,” but no income is listed with “Yes” to “Receiving Income Source?” in the income sub-assessment, and vice versa.

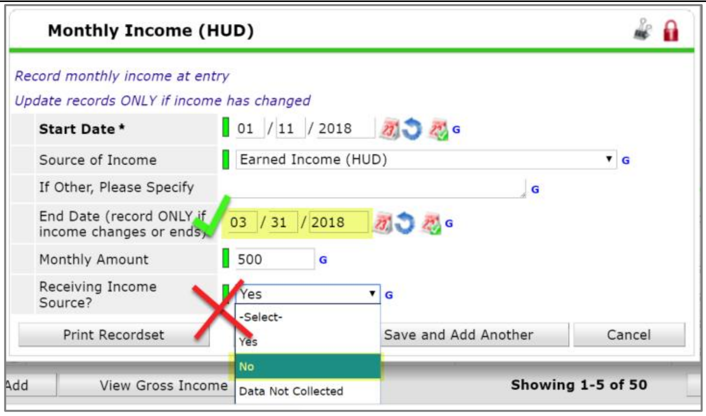
Since our end goal is to have congruent data, you should ask yourself “Do I need to update a response? Delete a response? Both?” You may have to utilize several different strategies to improve data quality. The instructions in this section focus on deleting data that was entered incorrectly.

SUB-ASSESSMENT IS INCORRECT

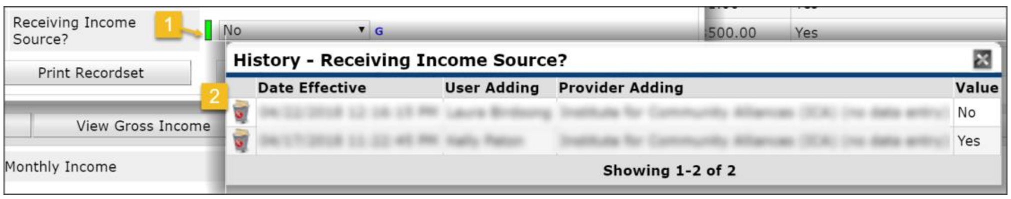
When a client’s income changes, you must update the sub-assessment accordingly. The most common error we see users make is updating the question “Receiving Income Source?” within the sub-assessment entry to reflect a change. We know this can be confusing, so let’s look at an example:

Let’s assume a client had Earned Income of $500 a month, and is no longer receiving that income. When you add an End Date to the Earned Income sub-assessment entry, you should NOT update “Receiving Income Source?” from “Yes” to “No” as that tells the system that the client did NOT receive Earned Income from the reported Start Date to End Date.

</td>
</tr>
</table>



If you accidently did this, you would want to delete the incorrect response (in example above, the "No" response) by clicking on the History Bar and selecting the trash icon!



Here's a quick [4-minute demo]() that provides tips and tricks. The video walks through how to resolve this issue from within the Entry Assessment, but the same steps should be taken for an Annual Assessment or the Exit Assessment.

1. Enter EDA mode[1] to the correct project provider and go to the client's record.

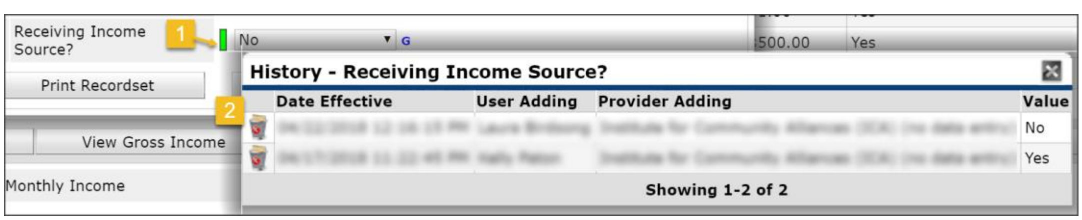
2. In the Entry/Exit tab, open the applicable Entry Assessment, Annual Assessment, or Exit Assessment to resolve.

3. If Entry Assessment, click on the Edit pencil to the left of the Entry date to open the entry assessment. Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)

4. From the Monthly Income sub-assessment table, click on the Edit Pencil to the left of the line item you want to edit. (Note: You may need to click on Next and Previous buttons to navigate to that record). DO NOT click on the magnifying glass: the system does not allow users to edit or delete info when a record is opened using the magnifying glass.

5. In the pop-up, click on the History Bar (a vertical box filled with the color brown, green, or red) to the left of the Receiving Income Source response.

6. Click on the trash can to the left of the response you want to delete.



The History Bar (1) can be used to view previously-entered assessment answers. Clicking on the trash can (2) next to an answer will delete that answer.

a. If you do not see a trash can, you may need to be in EDA mode to the provider that created/added the data.

b. If none of your providers added this response, you will not be able to delete it! Make a note of the client record and sub-assessment info and email the helpdesk at mnhmis@icalliances.org

INCOME FROM ANY SOURCE (Y/N DATA ELEMENT) IS INCORRECT

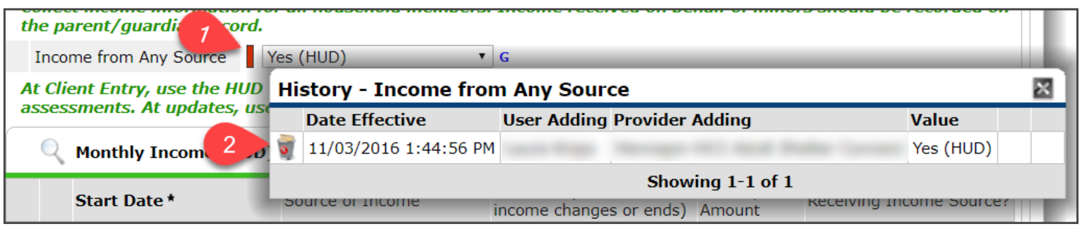
7. Enter EDA mode[1] to the correct project provider and go to the client's record.

8. In the Entry/Exit tab, open the applicable Entry Assessment, Annual Assessment, or Exit Assessment to resolve.

9. If Entry Assessment, click on the Edit pencil to the left of the Entry date to open the entry assessment. Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)

10. In the pop-up, click on the History Bar (a vertical box filled with the color brown, green, or red) to the left of the "Income from Any Source" response.

11. Click on the trash can to the left of the response you want to delete.



The History Bar (1) can be used to view previously-entered assessment answers. Clicking on the trash can (2) next to an answer will delete that answer.

a. If you do not see a trash can, you may need to be in EDA mode to the provider that created/added the data.

b. If none of your providers added this response, you will not be able to delete it! Make a note of the client record and sub-assessment info and email the helpdesk at mnhmis@icalliances.org

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A6 Missing **Date of Birth** (3.3)

You can fix this issue one of two ways.

Option One: Entry/Exit tab

1. Enter EDA mode[1] to the correct provider and go to the client's record.

2. In the Entry/Exit tab, click on the Edit pencil to the left of the Entry date to open the entry assessment. Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)

3. Respond to the missing data element(s).

4. Click on Save & Exit.

Option Two: Client Profile tab

		1. Enter EDA mode[1] to the correct provider and go to the client's record. **2. Backdate to the client's earliest entry date. IMPORTANT can't miss this step and resolve issue.** 3. In the Client Profile tab, respond to the missing data elements under "*Universal Profile*." 4. Respond to the missing data element(s). 5. Click on Save & Exit.
A7	Length of Stay **># of Days**	For Emergency Shelters and Transitional Housing projects only. It is uncommon for individuals or families to reside in shelter for over 90 days and transitional housing projects over 720 days. Follow the steps below, or watch a demonstration here (Start at 27 minutes 45 seconds). There is a variety of things to consider with clients that appear here to alert you to potential errors. • Confirm the client actually stayed in your program. If they did not stay, delete the shelter stay or entry exit. • Check to make sure the correct provider was used. If the incorrect provider was used, update the provider to the correct provider. • Confirm that the program stay is recorded in line with your workflow. If your stays are not in line with your workflow, please contact us for further guidance. • Confirm that the start and end dates are correct for each client. If incorrect, update to the most accurate dates you can find. If an end date is missing, check to see if client should be exited and, if so, add the correct end date. • If the start and end dates are correct, there is no need for any further action. • SPM reports will pull any Service Transaction (ClientPoint), Entry/Exit (ClientPoint or ShelterPoint), or Shelter Stay (ShelterPoint) within time period. This may also result as an error if you are using Service Transactions and there is no exit date on the Service Transaction. To end Service Transactions, click on the Edit pencil under "Services" in the Summary tab. (Backdate is not required.)

A8 Missing **Housing Move-In Date** (3.20)

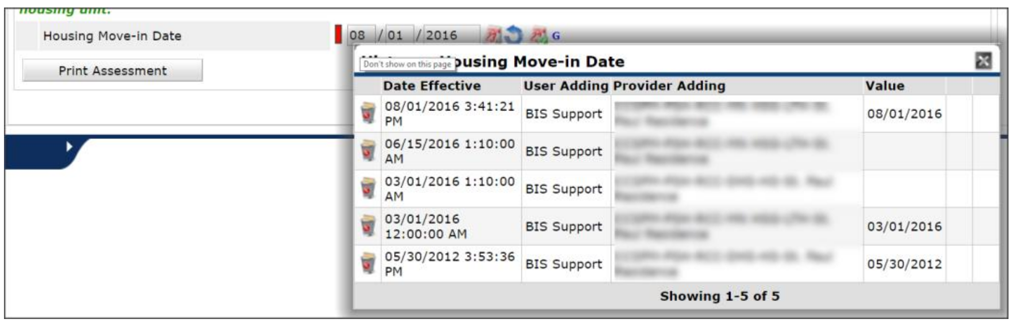
Not all missing HMI date is an error, even if there is an alerter on the report “No HMI Date.” If there isn’t an HMI Date, this may simply indicate you are still working with the client to find housing. Please review all clients without an HMI Date to confirm they are not housed and/or your program didn’t house them. If you worked with a client and they exited without being housed by your program, keep HMI Date null/blank. This will alert you on the report to No HMI Date which you can ignore.

ERRORS AS A RESULT OF AUTO-MAPPING

Housing Move-In Date is a new data element as of 10/1/2017. RRH did collect this data element since 2014 as Residential Move-In Date. The last day of the reporting period is 9/30/2017 for SPMs. Unless you are a RRH project, errors related to Housing Move-In Date may be the results of poor automapping that Mediware completed around 10/1/2017 where the Project Start Date (previously known as the Entry Date) was auto populated into Housing Move-In Date. You will not be able to resolve data entry errors due to auto-mapping.

HOW TO IDENTIFY AN AUTOMAPPING ERROR

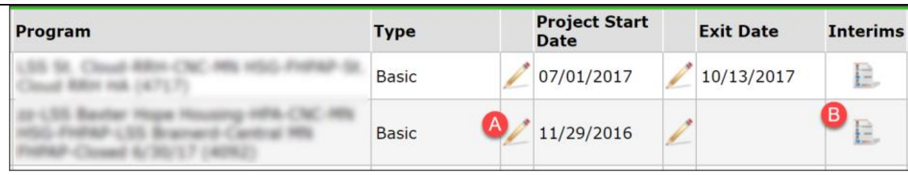
When you click on the History Bar of a data element, look for “BIS Support” in the User Adding column and, in the Values column, either missing dates or multiple dates that don’t make sense. You will be unable to resolve this error as you won’t see trash cans to the left of the table as do we system administrators (see image below). If you identify an automapping error, please contact the HMIS helpdesk at mnhmis@icalliances.org



ADDING A HOUSING MOVE-IN DATE

Housing Move-in Date is completed on the Entry Assessment or Update and needs to be between Project Start Date and Project Exit Date.

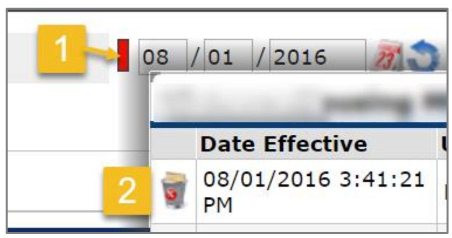
1. Enter EDA mode[1] to the correct provider and go to the client’s record.
2. If Project Start Date equals Housing Move-In Date
   a. In the Entry/Exit tab, click on the Edit pencil to the left of the Entry date to open the entry assessment (See A in image below). Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)
3. If Project Start Date does not equal Housing Move-In Date
   a. In the Entry/Exit tab click on the Interim Update icon (See B in image below). Either (1) click on the Edit pencil to the left of the Interim date and click on Save & Continue in the first pop-up or (2) click on Add Interim Review and follow prompts (Interim Review Type = Update).



4. Respond to the missing data element(s).
5. Click on Save & Exit.

DELETING INCORRECT RESPONSES

1. Enter EDA mode[1] to the correct project provider and go to the client's record.
2. Click on the Edit pencil to the left of the Entry date to open the entry assessment. Click on Save & Continue in the first pop-up. (Note: You do not need to be in back date mode when correcting this error.)
3. In the pop-up, click on the History Bar (a vertical box filled with the color brown, green, or red) to the left of the Housing Move-In Date.



   a. If you do not see a trash can, you may need to be in EDA mode to the provider that created/added the data.
   b. If none of your providers added this response, you will not be able to delete it! Make a note of the client record and sub-assessment info and email the helpdesk at mnhmis@icalliances.org

A9 Missing **Destination** (at Exit)

You are required to answer this question immediately upon creating an Exit Record for a client. This will only appear as missing or error if the response was "Client Doesn't Know," "Client Refused," "Data Not Collected," or "No Exit Interview Complete." If you have an updated answer, use this as an opportunity to fix it, otherwise you can ignore this error message.

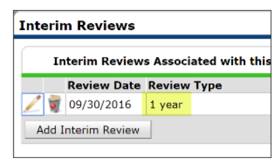
[1] EDA mode: If your "default" EDA provider is your project provider you may not need to enter EDA mode. You should know if this is the case for you as these types of exceptions are explained to you when your user account was setup. Contact the Helpdesk with questions.

ANNUAL ASSESSMENT ERRORS

Projects funded by HUD CoC are required to collect “Annual Assessments” from clients enrolled 365+ days in your program once per year (within 30 days of their anniversary date).

- The date of the update must be within 30 days of the anniversary date (Client’s Project Start Date) in the program.
- Even if nothing has changed, an interim (type: Annual Assessment) must still be recorded.
- Annual Assessment anniversary date is based on the Project Start Date not the Housing Move-In Date.
- Although the 2017 HUD Data Standards state that Annual Assessments are now based solely on the head of household’s anniversary date, that change went into effect on 10/1/2017. Annual Assessments that are needed before 10/1/2017 (The current SPMs look at data between 10/1/2016 – 9/30/2017), we need to update Annual Assessments based on the old way of doing things where Annual Assessments are based on the individual’s Project Start Date.
    - For example,
        - Mama and daughter enter program on 4/3/2015.
        - Partner enters program on 6/1/2015.
        - Mama and daughter need an Annual Assessment recorded annually within 30 days of 4/3.
        - Partner needs an Annual Assessment recorded annually within 30 days of 6/1.

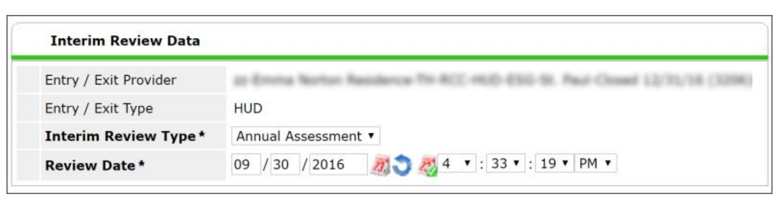
Error		Data Correction Instructions In most cases, these instructions should resolve error messages.
B1	Missing annual assessment review	This error is due to (1) individual needing an Annual Assessment recorded OR (2) the “Annual Assessment” recorded has an Interim Review Type as a “1 year”.



Adding an Annual Assessment

- Even if nothing has changed, an interim Annual Assessment must still be recorded.

1. Enter EDA mode to the correct provider and open the Head of Household’s client record.
    a. You do not need to be in backdate mode to enter an Annual Assessment. If you backdate to the information date (date of Annual Assessment), this is fine – but not necessary.
2. Click on the Entry/Exit tab.
3. Click on the Interims icon to the right of the HUD-CoC entry.
4. Complete prompts in the first pop-up.
    a. If serving a household, be sure to include all applicable household members in the update by checking the boxes.



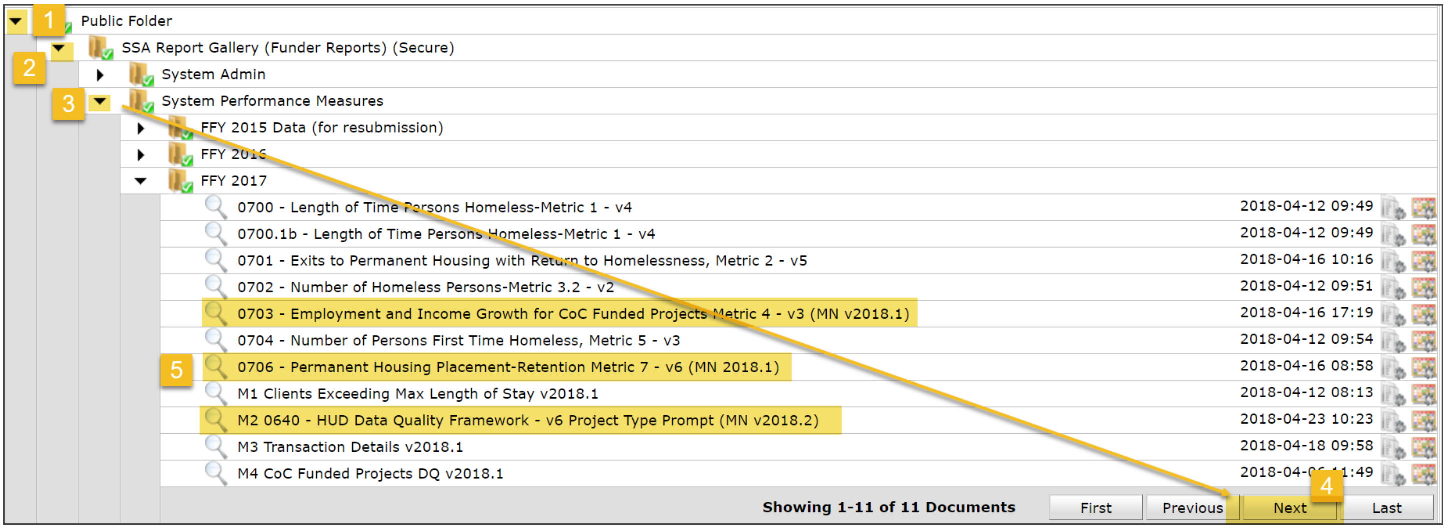
    b. Entry/Exit Provider and Entry/Exit Type will be pre-populated based on the Entry record.
    c. **Interim Review Type**: Annual Assessment
    d. **Review Date**: +/- 30 days of client’s anniversary date based on Project Start Date.
    e. Click on Save & Continue.

	5. Update data elements (for each household member) on the assessment in the Entry/Exit Interim Review pop-up. If nothing has changed, move to next step! 6. Click on Save & Exit. **CHANGING THE REVIEW TYPE** Make sure the incorrectly coded interim review you are updating falls +/- 30 days of the client's anniversary date. 1. Enter EDA mode to the correct provider and open the Head of Household's client record. a. You do not need to be in backdate mode to enter an Annual Assessment. If you backdate to the information date (date of Annual Assessment), this is fine – but not necessary. 2. Click on the Entry/Exit tab. 3. Click on the Interims icon to the right of the HUD-CoC entry. 4. Click on the Edit Pencil to the left of the interim review that represents the Annual Assessment (just coded incorrectly!). 5. In the next pop-up, change the Review Type to Annual Assessment. 6. Click on Save & Continue. 7. Click on Save & Exit.
B2 Annual assessment recorded **outside +/- 30 day window**	**CHANGING THE REVIEW TYPE** **FIRST,** if an Annual Assessment was recorded outside of the +/- 30 days, change that Interim Review Type to "Update" to document that a review of the client record occurred. 1. Enter EDA mode to the correct provider and open the client's record. a. You do not need to be in backdate mode to enter an Annual Assessment. If you backdate to the information date (date of Annual Assessment), this is fine – but not necessary. 2. Click on the Entry/Exit tab. 3. Click on the Interims icon to the right of the HUD-CoC entry. 4. Click on the Edit Pencil to the left of the interim review that represents the households update (just coded incorrectly!). 5. In the next pop-up, change the Review Type to Update. 6. Click on Save & Continue. **7.** Click on Save & Exit. **THEN,** you must record an Annual Assessment within 30 days of the client's Anniversary Date. Review the steps on the previous page for Adding an Annual Assessment. **SCENARIO A** **Project Entry Date**: 1/1/2017 **Annual Assessment Date**: 12/1/2017 (Flagged as error as outside 30 days) **Resolution**: Change the 12/1/2017 Interim Review Type from Annual Assessment to Update. Add a new Annual Assessment record that falls between 12/2/2016 and 1/31/2017. As you completed an Interim Review (Type: Update) with the client and recorded changes before the date of the official Annual Assessment record, the information you collected and entered at Update will pull onto the Annual Assessment. While it is best practice to connect with client and

		recreate an Annual Assessment for what was true for the client at that time to account for any changes to report, record an Annual Assessment even if nothing has changed. **SCENARIO B** **Project Entry Date**: 1/1/2017 **Annual Assessment Date**: 2/1/2018 **Resolution**: Change the 2/1/2018 Interim Review Type from Annual Assessment to Update. Add a new Annual Assessment record that falls between 12/2/2016 and 1/31/2017. In this scenario, the Interim Review (Type: Update) was completed after the Annual Assessment window. Therefore, any data you entered at Update will not pull onto the Annual Assessment. Any changes (ex. Increase in income) will not be considered in your APR for that particular Annual Assessment. If you added information to the Interim Review (Type: Update) that you want to pull onto your Annual Assessment, this will be a little more complex. You will have to: (1) Change the Annual Assessment to Update. (2) Create a new Annual Assessment record that falls between 12/2/2016 and 1/31/2017. RE-ENTER the changes onto a new Annual Assessment. (3) Then re-open the previous Annual Assessment (now Update) and delete any duplicate sub-assessment records.
B3	Flag if >1 annual assessment recorded in 1 yr	Less than 1% an issue. Do nothing.
B4	Flag if annual assessment is correctly in +/- 30 day range, but on wrong side of FFY to be counted	Less than 1% an issue. Do nothing.

DID I FIX THE ERROR? YOU CAN CHECK YOURSELF!

The errors we've reported above come from a variety of reports. When you pull these reports, direct all of your attention to the tabs we've identified below.



WHICH REPORT AND TAB BY ERROR

Error Type	Report and Tab
Annual Assessment Errors	0703 – Employment and Income Growth for CoC Funded Projects
3.917 Living Situation Errors	M2 0640 – HUD Data Quality Framework Tab H - Detail Q5
Income Sources Subassessment Errors	M2 0640 – HUD Data Quality Framework Tab E - Detail Q4 Entry
Housing Move-In Date Errors	0706 – Permanent Housing Placement Retention
Date of Birth (DOB) Errors	M2 0640 – HUD Data Quality Framework Tab C - Detail Q2 Q6
Relationship to Head of Household	M2 0640 – HUD Data Quality Framework Tab D - Detail Q3
Exit Destination Errors	M2 0640 – HUD Data Quality Framework Tab D - Detail Q3

PROMPTS TO USE

Report	Prompts
0703 - Employment and Income Growth for CoC Funded Projects Metric 4	Provider: Complete for your project(s) EDA Provider: (blank) Unless instructed by sys admin Prior Year Start Date: 10/1/2015 Current Year Start Date: 10/1/2016 Current Year End Date PLUS 1 Day: 10/1/2017 Effective Date: 10/1/2017
0706 - Permanent Housing Placement-Retention Metric 7	Provider: Complete for your project(s) EDA Provider: (blank) Unless instructed by sys admin Effective Date: 10/1/2017 Prior Year Start Date: 10/1/2015 Current Year Start Date: 10/1/2016 Current Year End Date PLUS 1 Day: 10/1/2017

M2 0640 - HUD Data Quality Framework - v6 Project Type Prompt (MN v2018.1)	Reporting Group: (blank) Provider: Complete for your project(s) EDA Provider: (blank) Unless instructed by sys admin CoC Code: (blank) Program Type Code: (blank) EDA Provider: (blank) Effective Date: 10/1/2017 Start Date: 10/1/2016 End Date PLUS 1 Day: 10/1/2017