How-To Guide: Eva: HMIS Data Quality Tool

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Overview

The HMIS tool Eva was created in 2022 by the Department of Housing and Urban Development (HUD) and the HUD Technical Assistance (HUD TA) agencies primarily to assist communities in preparation for required federal reporting, such as the LSA (Longitudinal System Analysis) and the SPM (System Performance Measures) – BUT can be used at any time to monitor HMIS data quality.

- HUD Exchange Eva Resources:
 - o https://www.hudexchange.info/programs/hmis/eva/

Eva Overview Guide	Eva - Upload HMIS Data	Eva - View Client Counts	Eva - System Performance
This guide provides an overview of ves including, what kind of tool Eva is, what Eva can do for communities, how to use Eva, how data is handled in Eva, and more.	This guide walks users through how to upload HMIs data into Eva including, generating a hashed HMIS CSV export. understanding upload status, next steps after successfully uploading data, and more.	This guide walks users through the View Client Counts page in Eva Including, the purpose of the Client Counts Report, how to use the Client Counts Report, understanding the System-Wide Client Counts download, and more.	This guide walks users through the System Performance Overview page in Eva Including, the purpose of the three system performance charts, how to filter the clients shown in the charts, how to read the charts, understanding the cha downloads, and more.
View the Guide	View the Guide	View the Guide	View the Guide
Fue Demonstration Middae			
This video provides an overview of Eva, how to navigate Eva, the purpose of each of the tabs, and the exports that a user can get from Eva.			

- Eva Website:
 - o https://hmis.abtsites.com/eva/

In 2023, WellSky updated their system to allow all users the ability to pull the report that is essential to be able to utilize Eva. This data quality tool can now be *used by any* End User to check their project and agency data quality at any time.

Eva is a tool that exists outside of HMIS and requires uploading the 'Hashed HMIS CSV' report from HMIS

This document walks through:

- How to Run the 'Hashed HMIS CSV'
- Downloading the report from Community Services
- How to upload the export to Eva
- How to utilize the results from Eva to complete data corrections in HMIS

How to Run the Hashed HMIS CSV Export

• The 'Hashed HMIS CSV' is found on the Reports tab

S Last Viewed ,	Reports > Report Dashboard			Type here for Glo	bal Search 🦺 📩 🔞
★ Favorites	Report Dashboard				
A Home	Provider Reports				
E Clients	۰.	۰.			
E Resources	Call Record Report	Client Served Report	FY2024 CoC APR	Pt/2024 Coordinated Entry APR	Daily Unit Report
Shelters					
E Scans	8,	8,	₹,	8,	8,
Reports ,	FY2024 Data Quality Framework	FY2024 ESG CAPER	Needs Report	PATH	Referrals
G Admin ,					
E+ Logout	Service Transaction				
Collapse 🛠					
	Custom Reports		(1	
	2		۹,		
	ReportWriter	Hashed HMIS CSV	VA Repository Export		

• Click 'Start New Export'

Reports > Hashed HMIS CSV		Fype here for Global Search	\$ ★0
Exports Scheduled in the Last 30 Days			
Date Scheduled Name	Туре	User Creating	Status
Refresh Start New Export	No matches.		
			Exit

- Name: TIP! Assigning a unique name will help to quickly ID between different exports
- Entry Data Type: This must match the 'Project Type' used when creating a client enrollment
 - Pulling a single 'Hashed HMIS CSV' for Multiple Projects:
 - If you are pulling a single export for multiple projects, a '*Reporting Group*' must first be created **Please contact the MD BoS MD BoS HMIS Team to request a '*Reporting Group*' be created for you**
 - Make sure to select all the '<u>Entry Data Types</u>' used by those projects!!
- **Provider Type**: Select either '*Provider*' or '*Reporting Group*' and follow the prompts
 - <u>Provider</u>:
 - My Provider will pull report for the project currently selected for 'Enter Data As'
 - Search will allow you to select a specific HMIS project that you have 'Enter Data As' access for

Export Options			
Name *			
Description			
Entry Data Type *	BitY BitD BitH Standard MA BitC HPSP (Retred)		
Provider Type *	Provider C Reporting Group		
Provider *	Please choose a provider.	Search My Provider Clear	
Start Date *	ideii		
End Date *			
			Run Export Cancel

- <u>Reporting Group</u>: To use this option a '*Reporting Group*' must first be created by the MD BoS HMIS Team
 Please contact the MD BoS MD BoS HMIS Team to request a '*Reporting Group*' be created for you
 - Make sure to select all the '<u>Entry Data Types</u>' used by those projects!!

Export Options	
Name *	
Description	
Entry Data Type *	Bit/t Bit/t Bit/t Bit/t Standard Standard V/A Bit/t Ut/tsp://table/
Provider Type *	O Provider · · · · · · · · · · · · · · · · · · ·
Reporting Group *	Please choose a reporting group. Swarch Clear
Start Date *	
End Date *	
	Run Export Cancel

• Start Date and End Date: Enter the date ranges you want to see client data for

For the FY24 the date ranges you want to are <u>10/1/23 – 9/30/24</u>

• Click 'Run Export'

Export Options	
Name *	
Description	
Entry Data Type *	BitY HUD 2ATH Standard VA Basic HISPE Refered
Provider Type *	C Provider @ Besorting.Brown
Reporting Group *	Please choose a reporting group. Clear
Start Date *	j, j 🖞 🖞 🖞
End Date *	
	Run Export Cancel

- The scheduled report will then show under the scheduled export list, with a 'Status' showing 'Pending'. Time for exports to load varies depending on on the date range selected
 - Clicking 'Refresh' can update the 'Status' prior to the system notifying you that the export has been completed

Γ	exports Scheduled in the	Last 30 Days			
	Date Scheduled	Name	Туре	User Creating	Status
С	04/23/2024 (5:24 PM)	Example Export	HASHED_CSV	Jessica Jones (1061)	Pending
	Refresh Start Ne	w Export	Showing 1-1 of 1		\smile
					Exit

- Once the 'Status' shows as 'Completed', click the magnifying glass
 - Since exports remain for 30-days, having a unique '<u>Name</u>' for each export helps to identify the correct export to download

Ð	Exports Scheduled in the Last 30 Days				
	Date Scheduled	Name	Туре	User Creating	Status
۹	04/23/2024 (5:24 PM)	Example Export	HASHED_CSV	Jessica Jones (1061)	Completed
	efresh Start Ner	w Export	Showing 1-1 of 1		
					Exit

 Download the Export: After clicking the magnifying glass, a pop-up window will appear showing the report 4

prompts that were entered

Click 'Download Results' – this will download a zipped .csv file to your computer

Ex	port Details	×	
	Name	Example Export	
	Description		
	Туре	HASHED_CSV	
	User Creating	Jessica Jones (1061)	
	Status	Completed	
	Date Scheduled	04/23/2024 (5:24 PM)	
	Date Completed	04/23/2024 (5:25 PM)	
		Download Results 58.59 KB)	
	Entry Data Type RHY	No	
	Entry Data Type HUD	Yes	
	Entry Data Type PATH	No	
	Entry Data Type Standard	No	
	Entry Data Type VA	No	
	Entry Data Type Basic	No	
	Entry Data Type HPRP (Retired)	No	
	Provider		
	Start Date	04/01/2024	
	End Date	04/23/20	
		Exit	

• Now you are ready for Eva!

How to Use Eva

- Helpful Links
 - HUD Exchange Eva Resources:
 - https://www.hudexchange.info/programs/hmis/eva/
 - Eva Website:
 - https://hmis.abtsites.com/eva/

Eva's Menu: The menu is located on the left of each page within Eva

• **Demo Mode**: In Demo Mode, you can explore the functionality of Eva with a pre-uploaded HMIS CSV Export file that uses sample HMIS data

Turn on Demo Mode?	
You're currently requesting to turn on Demo Mode. Demo Mode allows you to explore Eva usir sample HMIS data, rather than having to use your own HMIS CSV Export file. You will still be at to upload your own HMIS CSV Export file when you turn off Demo Mode. Please select "Continue" to switch to Demo Mode	g le
Continue	æl

Demo Instructions

Welcome to Eva's Demo Mode. In Demo Mode, you can explore the functionality of Eva with a pre-uploaded HMIS CSV Export file that uses sample HMIS data. When Demo Mode is on, Eva has the same functionality but uses the sample HMIS data to provide examples of possible File Structure Errors, Data Quality Errors, and Warnings. Select any of Eva's pages from the navigation menu to the left to explore the application.

Turning Demo Mode On & Off

To turn Demo Mode on and off, use the yellow Demo Mode toggle on the top right of the screen. This toggle will be available from every page in Eva. Please note that you can turn Demo Mode off or on at any time, the application will just ask you to confirm your choice.

If you uploaded your own dataset to Eva and then decide to turn on Demo Mode, Eva will (1) clear the application of your HMIS data, ending the session, and (2) replace it with that of the sample dataset. If you wish to see your results again you will need to re-upload your hashed HMIS CSV Export file. To do so, you need to turn off Demo Mode. This will clear the sample HMIS data from the application so you can operate Eva as normal and upload your own HMIS data again.

 Each tab also includes an '*Instructions*' section, expand to see details of what that tab contains and how to navigate it

🇱 Eva	
Home	
Upload HMIS CSV Export	Welcome to Eva!
Edit Local Settings	Eva is an open-source project intended for local use by HMIS Administrators in Continuums of Care (CoCs) around the U.S. and its territories. Eva is designed to help you (1) assess the accuracy and completeness of the data within your HMIS, and (2) understand your homeless response system's flow and performance. Using Eva does not result in reporting or sharing data with HUD and use of Eva is not required by HUD.
View Client Counts	Eva is a web-based tool built with R Shiny. This means:
Assess Data Quality <	 Eva will only access your CoC's data during your session, no CoC data is being retained or viewed by anyone besides you. Eva does retain metadata about the upload file itself, such as the name of your software vendor, your export dates, hash status, and data source information. This is collected for troubleshooting and tool planning purposes.
>> Check Project Data	 You can up now a spiper can be provided in the time times to ensative. You can say up to date with the new features by visiting the Changelog tab.
≫ System-level	Click here to set started
>> Organization-level	
System Performance Overview	Instructions
Glossary	
View Changelog	Need help?
	Citations and Special Thanks

- Home: This page has information on how to utilize Eva and will walk you through uploading the 'Hashed HMIS CSV'
 - Clicking the 'Click here to get started' button will automatically move you to the 'Upload HMIS CSV Export' tab
- Upload HMIS CSV Export: This page is where you upload the Hashed CSV Export. You can navigate to this page at any time if you want to replace the export with a new export. More information can be found on the Eva Quick Start Guide Upload HMIS Data
 - Click 'Browse' and locate the export on your computer to upload to Eva

<u>ﷺ</u> Eva	Е ОЕМО МОДЕ Ф
Home	
Upload HMIS CSV Export	This tab will show relevant data once you have uploaded your HMIS CSV Export.
Edit Local Settings	Instructions +
View Client Counts	
Assess Data Quality <	Nomes No file selected
>> Check Project Data	
>> System level	
>> Organization-level	HMIS CSV Export File Structure Analysis
System Performance Overview	Dues should contact their worder to resolve bith neiroity errors identified in the HUIS CS/Ferrors Tile Structure Analysis, as well as any other structural issues which you feel need to be conserted
Glossary	the second s
View Changelog	

 If your upload is NOT successful, Eva will provide you with the below error message. Click 'OK' to download a report containing information of issues preventing the upload

Unsuccessful Upload: Your HMIS CSV Export is not structurally valid
Your HMIS CSV Export has some High Priority issues that must be addressed by your HMIS Vendor. Please download the File Structure Analysis for details.
ОК

- Many issues can be resolved by the End User. Read through Eva's File Structure Analysis and correct any client record issues
- Contact the MD BoS MD BoS HMIS Team for issues relating to *project set-up*
- If your upload is successful, you will get an 'Upload Successful' message. Click 'OK' to proceed

Upload successful	
Congratulations! You have succesfully uploaded an HMIS CSV Export.	
	ок

- Edit Local Settings: Please refer to the Eva Quick Start Guide Upload HMIS Data page for more information
 - View Client Counts: This page provides the number of households/clients who have been served in each project and their enrollment status. For additional information on how to use this tab refer to the Eva Quick Start Guide - View Client Counts
 - This report can be used to verify that a project is up to date on their HMIS data entry by comparing counts reported with the number of households/clients that are known to be served in each project
 - Permanent housing projects can check that the number of households/clients who have not yet moved into housing is correct

🇱 Eva	Ξ	DEMO MODE O
Home Upload HMIS CSV Export	This tab will show relevant data once you have uploaded your HMIS CSV Export.	
Edit Local Settings	Instructions	•
View Client Counts Assess Data Quality System Performance Overview	Date Range 10/01/2023 to 09/30/2024	
Glossary	Select Project	
View Changelog	Nothing selected •	
<	Client Counts Summary	
C	Client Counts Detail	

Assess Data Quality (DQ): This tab has 3 sub-tabs to view specific area of data quality. Each tab has a <u>download</u> <u>button</u>.

<u>Downloading</u> data as an excel spreadsheet can make it easier to edit/sort/share flags while correcting

Data will <u>only appear</u> in the following section if there <u>are data quality issues</u> that need attention

- Check Project Data: While Project Descriptor Data Elements (PDDEs) can only be updated or corrected by the MD BoS HMIS Team.
 - If you have any errors/warnings on this tab please download the report and email it to the MD BoS HMIS Team
- **System-Level**: There are many DQ flags that can be reported on this page including Duplicate Entries.
 - If the project has Duplicate Entries, downloading the data will provide you with the date & project that are overlapping.

- Organization-Level: This page will be the most helpful to End Users. It provides organization-level and project-level information regarding data quality errors and warnings, as well as a detailed export that provides guidance on addressing these errors and warnings
- Data Quality issues/flags are reported out in these categories:
 - High Priority Errors: These are errors that <u>must</u> be addressed to submit federal reports
 - Always indicates a data quality issue that <u>can and should</u> be fixed in HMIS
 - Aim for 0 High Priority errors
 - These errors affect multiple federal reports in a fundamental way (HoH issues, Duplicate Entries, etc.)
 - Agencies should prioritize addressing these errors first
 - Duplicate &/or Overlapping Project Enrollments:
 - o <u>Click Here</u> to view HMIS Dual Enrollment guidance on the HUD Exchange
 - If the Overlapping Enrollment involves another agencies project, End Users may need to contact the other agencies to resolve

General Errors:

- Always indicates a data quality issue that <u>can and should be</u> fixed in HMIS
- Aim for 0 General errors
- These include errors such as identifying clients with missing data, invalid move-in dates, and conflicting HUD Verification and tabular information
- Agencies should prioritize addressing these errors to achieve accurate data
- Warnings:
 - Could be a data quality issue, but may also be an <u>unexpected situation</u> that <u>reflects</u> <u>reality</u>
 - Check that any data being flagged as a Warning is accurate in HMIS. If not, then it must be corrected
 - These identify clients who have "Don't Know/Refused" answers, project overlaps, and clients who may have missed move-in or exit dates
 - Since there can be many warnings per agency, many of which may be accurate, agencies should prioritize addressing these by the type of issue identified
- Data Quality Summary: This summary information can be filtered by the <u>Project Name</u>, <u>High</u> <u>Priority – Error - Warning</u>, the exact <u>Issue</u>, and the number of <u>Clients</u> affected

Data Quality Summary				
Show 10 v entries				
Project Name	Type	Issue Å	Clien	its 🔅
All	All	All	All	
	High Priority	Duplicate Entries		4
	High Priority	Missing Relationship to Head of Household		1
	High Priority	No Head of Household		1
	Error	Missing Name Data Quality		199
	Error	Missing SSN		168

 Data Quality Guidance: This provides guidance on how to address each of the types of <u>High</u> <u>Priority – Error - Warning</u> listed for the agency

	Data Quality Guidance		
Ι.			
Type itsue i Guidance		Guidance	
	All	All	All
	High Priority	Duplicate Entries	A client cannot have two enrollments with the same entry date into the same project. These are duplicate enrollment records. Please address this issue.
	High Priority	Missing Relationship to Head of Household	This household has missing relationships with the designated head of household. According to the HMIS Data Standards Manual, every household member must have a Relationship to Head of Household and one member must be designated as the head of household for the entire duration of the enrollment.
	High Priority	No Head of Household	This household does not have a designated head of household. Every household must have exactly one head of household. Please be sure: 1. All members of the household are included in the program stay; 2. Each household member's birthdate is correct; 3. Every household member has a Relationship to Head of Household; 4. Exactly one member is designated as the head of household for the entire duration of the enrollment.
	Error	Conflicting Health Insurance yes/no at Entry	There is a discrepancy between the data element indicating that the client is receiving health insurance and the data elements regarding the health insurance sources. Please verify this client's health insurance at Entry to correct this error.

• View Changelog: This page contains a record of updates and changes made to Eva

鎌Eva	Changelog
Home	0 0
Upload HMIS CSV Export	This tab will list the most recent technical updates and changes to Eva. For more in-depth information on current and past issues, please go to GitHub.
Edit Local Settings	
View Client Counts	
Assess Data Quality 🔨	
> Check Project Data	
>> System-level	
>> Organization-level	
System Performance Overview	
Glossary	
View Changelog	

Checking the Progress of Data Quality Corrections:

 As you work through correcting the <u>High Priority – Error – Warning</u> listed in Eva, you can re-run the 'Hashed HMIS CSV' and create a new upload in Eva to check the progress of data quality corrections in the HMIS client records