

Balance of State CoC Monitoring Report Walkthrough

All screen shots in this manual are from a randomized set of providers or are of a fake client's profile and information.

IA-501 (Iowa Balance of State) Provider Monitoring Report (7/1/21 - 6/30/22)

The date at the top of this report shows you the exact dates for which data is analyzed. This is a good place to check to make sure that you've pulled the correct timeframe. Note: the end date here will be one date prior to the End Date + 1 in the user prompt field at the bottom of this page.

New Clients – this section reports on new enrollments in this project during the reporting period.

New Clients	
Number of NEW project entries	1,262
Intake: Ave Data Entry Delay (DAYS)	8.25
Does the agency maintain an average of 14 days or less between clients' program start and entry into HMIS?	Yes

Number of NEW project entries returns the total number of new clients.

Intake: Ave Data Entry Delay (DAYS) returns the average number of days delay between when a client enrolled in your project and when the data for that enrollment was entered into the system. *The goal for this metric is a 14-day (or less) average between a client's start and their entry into HMIS/DVIMS.*

Does the agency maintain an average of 14 days or less between clients' program start and entry into HMIS? returns a 'yes' or 'no' depending on what the **Intake: Ave Data Entry Delay** field reports.

Completeness – this section summarizes the amount of missing data recorded for each of the new clients. Please note that this section is not looking at the accuracy of data recorded; it's just making sure that these subsections are not left blank.

Completeness																		
What was your project's data completeness in ServicePoint?											Between 2% and 5%							
Vet	Relation-ship	DOB	Race	Gender	Ethnicity	DI	Insurance	Location	Zip	Prior Living Situation	LOS	Hmis start date	DV Survivor	Edu	Emp	Any Income	Total Cash Income	Any Non-Cash
2%	OK	OK	OK	OK	OK	OK	2%	OK	OK	OK	OK	OK	2%	5%	OK	OK	OK	3%

What was your project's data completeness in ServicePoint? returns the 'worst' completeness rate for any individual subsection. *The goal for this section is less than 2% missing data.*

If all subsections are less than 2% incomplete, then they will show 'OK' for each subsection and the project's completeness will show "Less than 2%".

If any subsection is between 2% and 5% incomplete, then the project's completeness will show "Between 2% and 5%".

If any subsection is more than 5% incomplete, then the total completeness will return "Greater than 5%".

For example, if all the subsections said 'OK' except for 'Gender', which returned 6% missing data, then the project's completeness will show "Greater than 5%".

To fix the incomplete records, you can run the CoC-APR for the reporting timeframe and project(s) in question to pull the relevant Client IDs. The table below shows where in the APR to look to address each subsection. Please reference the [Coc-APR and CAPER Walkthrough](#) for additional information.

Monitoring Report Subsection	CoC-APR section	Monitoring Report Subsection	CoC-APR section	Monitoring Report Subsection	CoC-APR section
Veteran Status (Vet)	6b*	Health Insurance (Insurance)	21^	Education (Edu)	
Relationship to Head of Household (Relationship)	6b*	Client Location (Location)	6b*	Employed? (Emp)	6c* – Income at Start
Date of Birth (DOB)	6a – information missing	Zip Code of Last Permanent Address (Zip)		Income from Any Source (Any Income)	6c* – Income at Start
Race	6a – information missing	Prior Living Situation	15^	Total Cash Income	6c* – Income at Start
Gender	6a – information missing	Length of Stay in Previous Place (LOS)	15^	Non-Cash Benefits (Any Non-Cash)	20b – Data not collected
Ethnicity	6a – information missing	Date Homelessness Started (Hmls Start Date)	6d** – approximate date started		
Disability Information (DI)	6b*	Domestic Violence Survivor (DV Survivor)	14a^		

*these sections on the APR will show you clients who have **any** errors, not **just** clients with no information in those fields.

these sections on the APR will show you clients who have no information **or a response that registers as an error, such as 'Client Doesn't Know' or 'Client Refused'.

^ these sections' 'total' will have all the clients who have ANY data entered. You can compare this list to the total clients served to figure out which clients have no data listed.

The information below that shows where to go in a client's profile or entry assessment to complete the relevant fields.

- **Vet** – ensures a client's veteran status is complete.

Client Information

Summary | **Client Profile** | Households | ROI

Client Record

Name	Client, A
Name Data Quality	Full Name Reported
Alias	Closed
Social Security	--1234
SSN Data Quality	Approximate or partial SSN reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	72

Select this pencil to edit the client's veteran status.

If this is blank, it is incomplete.

- **Relationship** – ensures the client’s *Relationship to Head of Household* status in the project’s entry assessment is complete.

Entry Assessment Saved to this PC

Household Members	Household Data Sharing
<input checked="" type="checkbox"/> (110677) Client, A Age: 72 Veteran: No (HUD)	Client: (110677) Client, A
	ERA Basic Entry
	SECTION 1A: ANSWER FOR ALL CLIENTS, INCLUDING CHILDREN
	Relationship to Head of Household <input type="text" value="-Select-"/>

If this is -Select-, it is incomplete.

- **DOB** – ensures the client’s *Date of Birth* is complete.

Client Demographics

Date of Birth	01/01/1950	If this is blank, it is incomplete.
Date of Birth Type	Full DOB Reported (HUD)	
Gender	Male, A gender other than singularly female o	
Race	White (HUD)	
Secondary Race		
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x) (HUD)	

- **Race** – ensures the completeness of the client’s *Race* in the entry assessment. The *Secondary Race* does not need to be completed.

SECTION 1A: ANSWER FOR ALL CLIENTS, INCLUDING CHILDREN

Relationship to Head of Household	<input type="text" value="Head of household's spouse or partner"/>	
Date of Birth	<input type="text" value="01 / 01 / 1950"/>	
Date of Birth Type	<input type="text" value="Full DOB Reported (HUD)"/>	
Race	<input type="text" value="White (HUD)"/>	If this is -Select-, it is incomplete.
Secondary Race	<input type="text" value="-Select-"/>	
Gender	<input type="text" value="Female"/> <input type="text" value="Male"/> <input type="text" value="A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, cult"/> <input type="text" value="Transgender"/> <input type="text" value="Questioning"/> <input type="text" value="Client doesn't know"/> <input type="text" value="Client refused"/>	

- **Gender** – ensures that at least one gender option is selected for the client.

SECTION 1A: ANSWER FOR ALL CLIENTS, INCLUDING CHILDREN

Relationship to Head of Household	Head of household's spouse or partner	G
Date of Birth	01 / 01 / 1950	G
Date of Birth Type	Full DOB Reported (HUD)	G
Race	White (HUD)	G
Secondary Race	-Select-	G
Gender	Female Male A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, cult Transgender Questioning Client doesn't know Client refused	If no options are selected, it is incomplete.

- **Ethnicity** – ensures that the client's *Ethnicity* field is completed.

Gender	Questioning Client doesn't know Client refused Data not collected	
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x) (H	If this is -Select-, it is incomplete.

- **DI** – ensures that the client's disability information is completed. This includes the drop-down *Does the client have a disabling condition?* field.

Does the client have a disabling condition? -Select- G

If this is -Select-, it is incomplete.

Disabilities HUD Verification

Disability Type *	Disability Determination?	* If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	Start Date *	End Date
Mental Health Disorder (HUD)	No (HUD)		07/21/2021	
HIV/AIDS (HUD)	No (HUD)		07/21/2021	
Developmental (HUD)	No (HUD)		07/21/2021	
Both Alcohol and Drug Use Disorder (HUD)	No (HUD)		07/21/2021	
Drug Use Disorder (HUD)	No (HUD)		07/21/2021	

Add Showing 1-5 of 28 First Previous Next Last

- **Insurance** – ensures that the client’s health insurance information is completed. This includes the drop-down *Covered by Health Insurance* field.

Covered by Health Insurance G

Health Insurance HUD Verification

Health Insurance Type *	Start Date *	Covered? *	End Date
Other	07/21/2021	No	
Indian Health Services Program	07/21/2021	No	
State Health Insurance for Adults	07/21/2021	No	
Private Pay Health Insurance	07/21/2021	No	
Veteran's Administration (VA) Medical Services	07/21/2021	No	

Add Showing 1-5 of 58 First Previous Next Last

If this is -Select-, it is incomplete.

- **Location** – ensures that the *Client Location* section is completed.

SECTION 2: ANSWER FOR HEADS OF HOUSEHOLD AND ADULTS

Client Location

This should always be IA-501

- **Zip** – ensures that the client’s *Zip Code of Last Permanent Address* is completed.

Zip Code of Last Permanent Address G

Zip Data Quality G

If this is blank, it is incomplete.

- **Prior Living Situation** – ensures that the client’s *Prior Living Situation* field is completed.

Prior Living Situation G

Length of Stay in Previous Place G

Did you stay less than 7 nights? G

If this is -Select-, it is incomplete.

- **LoS** – ensures the field *Length of Stay in Previous Place* is completed, including any follow-up questions in this section of the assessment.

Prior Living Situation G

Length of Stay in Previous Place

Did you stay less than 7 nights? G

If this is -Select-, it is incomplete.

If any follow-up questions are -Select- or blank, it is incomplete.

- **Hmls Start Date** – ensures that, if applicable, the field *Approximate date homelessness started:* is completed. Since this field is contingent on the clients' answers to *Prior Living Situation* and *Length of Stay in Previous Place*, it will not show for each client.

Prior Living Situation	Place not meant for habitation (HUD)
Length of Stay in Previous Place	One night or less
Approximate date homelessness started:	<input type="text"/> / <input type="text"/> / <input type="text"/>

If this is blank, it is incomplete.

- **DV survivor** – ensures that the clients' *Domestic violence victim/survivor* field is completed.

Domestic violence victim/survivor	No (HUD)
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If this is -Select-, it is incomplete.

- **Edu** – ensures that the *Last Grade Completed (HUD)* field is completed.

Last Grade Completed (HUD)	Client doesn't know
Employed? (HUD)	Yes (HUD) G
Income from Any Source	Yes (HUD) G
Total Monthly CASH Income	500 G

If this is -Select-, it is incomplete.

- **Emp** – ensures that the *Employed? (HUD)* field is completed.

Last Grade Completed (HUD)	Client doesn't know G
Employed? (HUD)	Yes (HUD)
Income from Any Source	Yes (HUD) G
Total Monthly CASH Income	500 G

If this is -Select-, it is incomplete.

- **Any Income** – ensures that *Income from Any Source* field is completed.

Last Grade Completed (HUD)	Client doesn't know G
Employed? (HUD)	Yes (HUD) G
Income from Any Source	Yes (HUD)
Total Monthly CASH Income	500 G

If this is -Select-, it is incomplete.

- **Total Cash Income**- ensures that the *Total Monthly CASH Income* field is completed.

Last Grade Completed (HUD)	Client doesn't know	G
Employed? (HUD)	Yes (HUD)	G
Income from Any Source	Yes (HUD)	G
Total Monthly CASH Income	500	

If this is blank, it is incomplete.

- **Any Non-Cash** – ensures that the *Non-cash benefit from any source* drop-down field is completed.

Non-cash benefit from any source No (HUD) G

If this is -Select-, it is incomplete.

Non-Cash Benefits HUD Verification

Source of Non-Cash Benefit *	Receiving Benefit? *	Start Date *	End Date
Other TANF-Funded Services (HUD)	No	12/07/2017	

Client Served – this section reports on all clients served during the reporting period, regardless of whether they were enrolled during or prior to the reporting period, and further analyzes how many of those adults and heads of households came from homeless situations.

Client Served	
Total number of participants served (All / Adults). (a)	1,505 / 1,177
Number of adult participants or head of households (HoH) served that came from the street, other locations not meant for human habitation, emergency shelters, safe havens, or fleeing domestic violence, including less than 90 days in institution with literally homeless immediately prior. (b)	524
Percentage of adult or head of household participants that entered from the sources above (b)/(a).	45%

In this example, 1,505 total clients were served during the reporting period, and 1,177 of those clients were adults or heads of household.

Of the 1,177 adult clients, 524 of them were experiencing homelessness when they enrolled in the project.

Thus, the percentage of adults served in the reporting period that came from homeless situations is 45% ($524 / 1,177 = .45$). *The goal for this metric is 93% for RRH projects, and 80% for PSH projects.*

Permanently housed and exited clients – this section reports on clients who were exited during the reporting period, with additional metrics regarding clients who exited to permanent housing situations. All the sections that look at RRH and PSH projects exclusively focus heavily on clients’ move-in dates.

Permanently housed and exited clients	
Number of clients with Housing Move-in Date or permanent destination without move in date. (RRH and PSH ONLY)	19
What was your program’s average length of time from enrollment to permanently housed? (RRH and PSH ONLY)	20 days
Number of clients with invalid move in date or missing move in date (RRH and PSH ONLY)	10
Percentage of move-in errors (RRH and PSH ONLY)	53%
Destination Error Rate (All project types)	18%

Number of clients with Housing Move-In Date or permanent destination without move in date. (RRH and PSH ONLY) returns the total number of clients with a housing move-in date or a permanent destination without a move-in date during the reporting period. Please note that if a client achieves permanent housing on the same date that they exit a project, they should have a housing move-in date on that exit date (on the exit assessment).

What was your program’s average length of time from enrollment to permanently housed? (RRH and PSH ONLY) returns the average length of time from entry date to either the move-in date or exit to permanent housing (if there is no move-in date) for all clients in the above metric. *The goal for this metric is 30 days.*

Number of clients with invalid move in date or missing more in date (RRH and PSH ONLY) returns the number of clients who have move-in date errors. *The goal for this metric is less than 5%.* The most common errors are listed:

- An exit to permanent housing without a move-in date on either an interim review or the exit assessment (only for RRH and PSH projects).
- Move-in date is not blank on the entry assessment
- The move-in date is before the entry date
- The move-in date is after the exit date
- There are multiple interim reviews with different move-in dates in one entry

SECTION 1B: FOR PERMANENT HOUSING PROJECTS (RRH/PSH/OPH) - Answer for all clients, including children

Housing Move-in Date	02 / 01 / 2022	

Destination Error Rate (All project types) returns the number of clients with any destination error. This applies to all destinations that are not completed, 'Data not collected', 'Client doesn't know', 'Client refused', or 'No exit interview completed' are selected. This metric applies to all project types. *The goal for this metric is less than 10%.*

Edit Exit Data - (110677) Client, A

Edit Exit Data - (110677) Client, A

Exit Date * 04 / 05 / 2022 12 : 45 : 34 PM

Reason for Leaving -Select-

If "Other", Specify

Destination * Hospital or other residential non-psychiatric medical facility (HUD)

If "Other", Specify -Select-

Notes

- Client doesn't know (HUD)
- Client refused (HUD)
- Data not collected (HUD)
- Deceased (HUD)
- Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)
- Foster care home or foster care group home (HUD)

Increased Income – these sections return information regarding whether clients' income increases during their stay in permanent housing (for PSH projects) or by the time they exit the project (for all other project types).

Increased income: Adult Leavers (Score for ES/TH/RRH/SH)	
Number of adults who exited (system leavers)	679
Number of adults who exited with increased total income	81
Percentage of adults who increased total income	12%
Increased income: Adult Stayers (Score for PSH only)	
Number of adults (system stayers)	89
Number of adults who increased total income	0
Percentage of adults who increased total income	0%

The metric for most projects is based on whether a client's income is greater at their exit than at their entry. However, PSH projects tend to work with clients in housing for years, and thus this metric is based on a client's annual reviews for that project type. *Note: A client **must** be enrolled at least a year to be considered a 'stayer', since it's nonsensical to compare income increases from clients who have just been enrolled 1 month to clients who have been enrolled for 12 months.*

The goal for this metric is 30% for RRH projects, and 25% for PSH projects.

Please reference the [CoC-APR and CAPER Walkthrough](#) section 6c for additional information on identifying and correcting income errors.

Metric 7b.1 and Metric 7b.2 – these sections return the same information as HUD’s System Performance Measures of the same titles. These measures are used at the programmatic level to track whether clients are exiting projects to permanent housing destinations or remain housed in permanent housing in a project. The [System Performance Measures Introductory Guide \(hudexchange.info\)](http://hudexchange.info) provides an overview of system performance measures.

Metric 7b.1 - Change in exits to permanent housing destinations	
Persons in ES, SH, TH, and RRH who exited	207
Exited to permanent housing destinations	83
Percentage successful exits/retention	40%
Metric 7b.2 - Change in exits to or retention of permanent housing (PH)	
Persons in applicable PH projects who exited after moving into housing, or who moved into housing and remained in the PH projects	4
Remained in applicable PH projects and or exited to permanent housing destinations	3
Percentage successful exits / retention	75.00%

The goal for this metric is 80% for RRH projects, and 85% for PSH projects.

Chronically Homeless – this section returns information regarding the number of clients served during the reporting period who met the definition of chronically homeless.

Chronically Homeless	
Number of adult participants who met the definition of chronic	126
Percentage of adult participants who met the definition of chronic	11%

The goal for this metric is 10% for RRH projects, and 50% for PSH projects.

Please reference the [CoC-APR and CAPER Walkthrough](#) section 6d for additional information on identifying and correcting any data that contributes to the calculation of whether a client was chronically homeless upon entry.

VI Score Range – this section reports on the number of clients who have a VI-SPDAT score and what their score was.

VI Score Range	Single Client Count	% Single Count	Family Client Count	% Family Count
PSH (Single: 8+; Family 9+)	84	53.16%	10	71.43%
RRH (Single: 4-7; Family: 4-8)	62	39.24%	3	21.43%
Diversion (0-3)	12	7.59%	1	7.14%

User Prompt Field – this section reports on the answers to the initial reporting prompts, so that you can double-check to ensure that you actually entered the correct information.

- **Provider** – the project that you’re pulling data for
- **Report_StartDate** – the start date of the reporting period
- **Report_EndDate + 1 DAY** – one date greater than the end date of the reporting period. For example, if the reporting period ends on 6/30, then this should read 7/1.
- **EDA Provider** – should always be Default Provider
- **Enter effective date (should be the day the report was generated)** – the date that the report was generated
- **Report Version** – autogenerated by the report
- **Report Generated** – should be the same as the effective date

User Prompt Field	Value(s) Selected
Provider	[REDACTED]
Report_StartDate	7/1/21
Report_EndDate + 1 DAY	7/1/22
EDA Provider	-Default Provider-
Enter effective date (should be the day the report was generated)	7/15/22
Report Version:	v11162018
Report Generated:	7/15/22

Navigating the other tabs of the monitoring report – in SAP, the monitoring report has two additional tabs that provide some additional information to help projects identify clients with errors.

The screenshot shows the SAP interface for a monitoring report. At the top, there is a navigation bar with a home icon, the SAP logo, and the text 'Welcome: Kasperian Kittr...'. On the right side of the navigation bar, it says 'BOS CoC Monitoring Report v07062022'. Below the navigation bar, there are tabs for 'File', 'Data', and 'Analyze'. The 'Data' tab is active, and there are icons for saving, undo, redo, and refresh. Below the tabs, there is a section for 'Prompts' with 6 prompts. Underneath, there are two tabs: 'Project Results' and 'Invalid Move-in' (highlighted in yellow). Below these tabs, there is a table with the following data:

IA-501 (Iowa Balance of State) Provider Monitoring Report (7/1/21 - 6/30/22)	
New Clients	
Number of NEW project entries	1,262
Intake: Ave Data Entry Delay (DAYS)	8.25
Does the agency maintain an average of 14 days or less between	Yes

Invalid Move-In – this tab returns a table that provides the client IDs for clients that have a move-in at all. (The column with the client IDs is removed from the example below). *Please note that although this table will assist in identifying move-in date errors, it does **not** show every possible error. Please reach out to a system administrator if you cannot identify where move-in date errors are coming from for assistance.*

	Entry Date	Housing Move-in Date (Entry)	Exit Date	Exit Destination	Dest Category (PH)	Invalid Move-in
1	7/13/21		9/3/21	Other (HUD)		0
2	6/22/22	6/28/22				Invalid
3	6/10/21		9/8/21	Rental by client, no ongoing housing s	PH	Invalid
	11/5/21		3/28/22	Rental by client, with VASH housing s	PH	Invalid
4	12/20/21	2/1/22	5/2/22	Rental by client, no ongoing housing s		Invalid

- (1) – this entry has no errors regarding the move-in date (Invalid Move-in = 0)
- (2) – this entry has a move-in date on the client’s entry assessment (Housing Move-in Date (Entry) is not blank), so it registers as an error.
- (3) – these clients exited to a permanent housing destination but have no move-in date on either an interim review or the exit assessment, so they register as an error.
- (4) – this client also has a move-in date on their entry assessment, so it registers as an error.

Data Entry Delays – this tab returns a table that provides the client IDs for each client entered into the project during the reporting period, their entry date into the project, and the date in which that data was added to the system. This allows you to look at data entry client-by-client to identify any clients that might have larger than normal delays.

Entry	Exit	Client Id	Entry	Exit	Entry Date	Entry	Exit	Date Added	Ave Data Entry Delay (DAYS)
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