

HPRP/HMIS Tip of the Week #14

HPRP Assessments/Backdating (Updated)

This is an updated Tip of the Week originally written with the amount of missing data in mind. Recently, there has been an issue on the HPRP APR (Section 7) that has warranted a second look at the HPRP Workflow and guidance on backdating. As a result, this Tip is getting a re-write because while the topic is very important, it is a relatively small change. I have also updated the HPRP Workflow document, so if you refer to that, please reprint the updated version and use it instead. I will walk through the workflow in this Tip, but only focus on the assessments and backdating. It might help to have it handy when reading this Tip.

Let's walk! For every HPRP client, you will fill out two assessments- one at entry and one at exit. In your workflow, after you have created your client, the first step is to fill in the SSN field (if it's not already populated from your search) and the SSN Data Quality field.

Next in the new workflow is to create your household and then add an entry date for the household. (I am glossing over this portion of the data entry because we are focusing on the assessments.)

First Assessment: "HPRP". If the client was assessed on a date prior to the day you are entering the client's data, you will backdate. (See next section of this document as to how and why to backdate.) Once you've backdated (if necessary), you will see the gray bar turn bright yellow so you'll remember you're in backdate mode. Next, fill in the assessment and save. All of the fields on the HPRP assessment are REQUIRED for ALL clients- adult or child. You have now saved one of the two assessments required for your Head of Household. Let's say you have a family of four for this example.

On to the other household members! The next step here is very important, and where, I think, some folks are getting confused. The next step is to go up to the household information, and click the name of the next member of the household. Once you are in that client's record, you will see her/his name at the top. (You will still be in backdate mode.) Click over to the Profile tab and fill in the SSN and SSN Data Quality field, then click back over to the HPRP assessment tab to complete the HPRP assessment for that household member. Then repeat this process until you have completed and saved the SSN and HPRP assessment for every client in the household. At this point, you can go back to your Head of Household and back into Live Mode, then move on in your workflow to your Services.

Second Assessment (Time to Exit!): "Ohio HPRP Exit". Follow the steps below to exit a household. Don't forget that once you have exited the household, you will need to fill out the exit assessment on EACH household member, not just the Head of Household.

It is definitely saving assessment data that takes the longest amount of time to complete, but it is a very important piece of the work, and now that we know more about what will be reported out on the HPRP APR, it will be one of my major focal points in regards to data quality.

BACKDATING:

I am combining this Tip of the Week with a section on Backdating because I did receive a few requests to explain backdating further. And the topic of Assessments fits nicely with a really in-depth discussion of backdating.

When you save an assessment, you are saving data that tells a piece of a story relevant to the client. However, some of the questions have answers that will change over time. So in order to record a moving picture of each client's changing set of circumstances, Bowman designed ServicePoint to record a date with every assessment answer. The date that gets recorded with each of the fields is the Assessment Date (at the top of the assessment.)

When you enter an Assessment Date and click "Backdate", you'll notice that the time attached to the Assessment Date field automatically reverts to midnight. Up until recently, this has been ok, however, we have learned that it is actually creating some problems in your reporting. The new instructions on this are as follows:

1. You'll notice in the updated HPRP Workflow, I have moved the step of filling out the "Additional Profile Information" assessment so that it is *after* you have given the household an Entry Date. This is because I am recommending that whenever you give your household their Entry Date, that you write down the date and time you're using to indicate when they entered your program. You'll need it when backdating.
2. Once your client, household, and Entry/Exit has been created, it's time to work on your assessments. The first step of this is the backdating.

Ohio Balance of State HPRP

3. HOW TO BACKDATE (ENTRY):

- a. Enter the date you wrote down in Step 1 into the "Assessment Date" field. (Don't bother changing the time yet, as it will just revert to midnight anyway.)
 - b. Click Backdate. (You're in "Backdate Mode" at this point, but we still have a couple steps because we want to align the *time* to the Entry Date as well.)
 - c. Edit the time to match what you wrote down in Step 1.
 - d. Click Backdate again. (Still in Backdate Mode, just the time has been adjusted correctly now.)
4. Enter and save whatever assessment data that goes with the situation at Entry.
 5. Click through the whole household saving assessment data for everyone, then click back onto the Head of Household once you're done.
 6. Click Return to Live Mode, continue with your workflow.
 7. Once it's time to exit your client, you'll also notice that the workflow's order has been slightly adjusted so that you will exit your household first and then do your Exit Assessment. So after you've saved an Exit Date for your household, write down what that date/time is.
 8. Go to the Ohio HPRP Exit Assessment.

9. HOW TO BACKDATE (EXIT):

- a. Enter the date you wrote down in Step 7 into the "Assessment Date" field. (Don't bother changing the time yet, as it will just revert to midnight anyway.)
 - b. Click Backdate.
 - c. Edit the time to match what you wrote down in Step 7.
 - d. Click Backdate again.
10. Enter and save whatever assessment data that goes with the situation at Exit. You only need to change data that has changed since the Entry Date, such as Income, Non-Cash, and Housing Status.

Some users like to adjust their times to 8am for the Entry and 5pm for the Exit. This is still completely ok to do, but it's also ok to let the current time (in Louisiana where our server is) come through. The important thing is to be aware of what the date/time is. If you are making all Entry times 8am and Exit times 5pm, then you would also make all your backdate times 8am and 5pm to match that.

Backdating just means that you are entering data that was true of the client "as of" that date/time you entered as the Assessment Date. If you are entering live data and choose not to go into backdate mode, you'll notice that the Assessment Date defaults to today's date and time because the assumption is that you are entering data that is certified to be true "as of today." It is fine to not backdate and leave the time as it is, even if it may not match exactly with your Entry Date/Time or Exit Date/Time.

This change in workflow is the "going forward" variety, for the most part. If your HPRP APR Section 7 has a zero next to Entering Stably Housed, you should not need to go back to correct anything you've done in the past. However, if you do have errors here, please follow the above instructions to correct those issues.

HPRP APR Section 7: (please see Tip of the Week #21 for instructions on how to run and troubleshoot your APR.)

7. Housing Status at Entry	
	Total
Literally homeless	1607
Imminently losing housing	8196
Unstably housed	124
Stably housed	416
Total	10343

The image to the left is Section 7 of the HPRP APR run for the entire Balance of State. You'll notice there are 416 clients who appear to have entered the program Stably Housed, and 124 clients who appear to have entered the program Unstably Housed. These will need to be corrected before this report is due to HUD. Most of these are clients where the Entry Date and Exit Date are either on the same day or are only one day apart, and as a result, ServicePoint has had a difficult time of figuring out which Housing Status goes with the Entry and which one goes with the Exit. These must be corrected using the above guidance regarding backdating.

If you have any questions please ask.

Comments, questions, and feedback are welcome. If you would like to not receive "HPRP HMIS Topic of the Week" anymore, or would like to be included, please email genelledenzin@cohhio.org.