

# Permanent Supportive Housing (PSH) Evaluation Tool

## User Guide

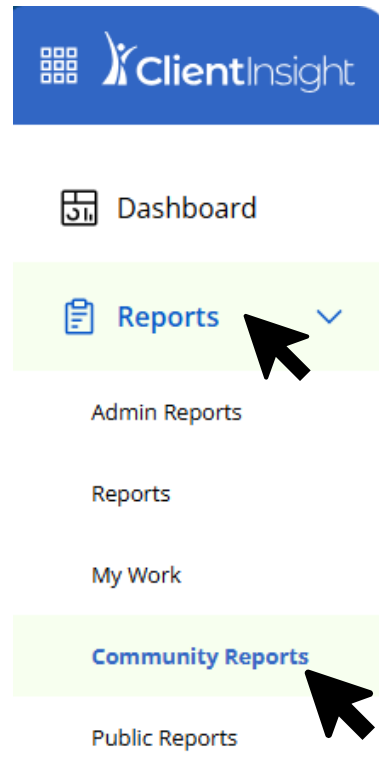
### Getting Started

#### Opening the Tool in ClientInsight:

1. Log-in to ClientInsight.
2. Select **Reports**.
3. In the Reports drop-down menu, select **Community Reports**.
4. In the Report Name search field, type **“evaluation.”**

Report Name

5. Select the report called **“Permanent Supportive Housing (PSH) Evaluation Tool.”**



Permanent Supportive Housing (PSH)  
Evaluation Tool

Custom

Published

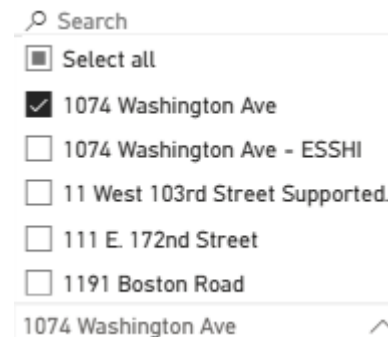
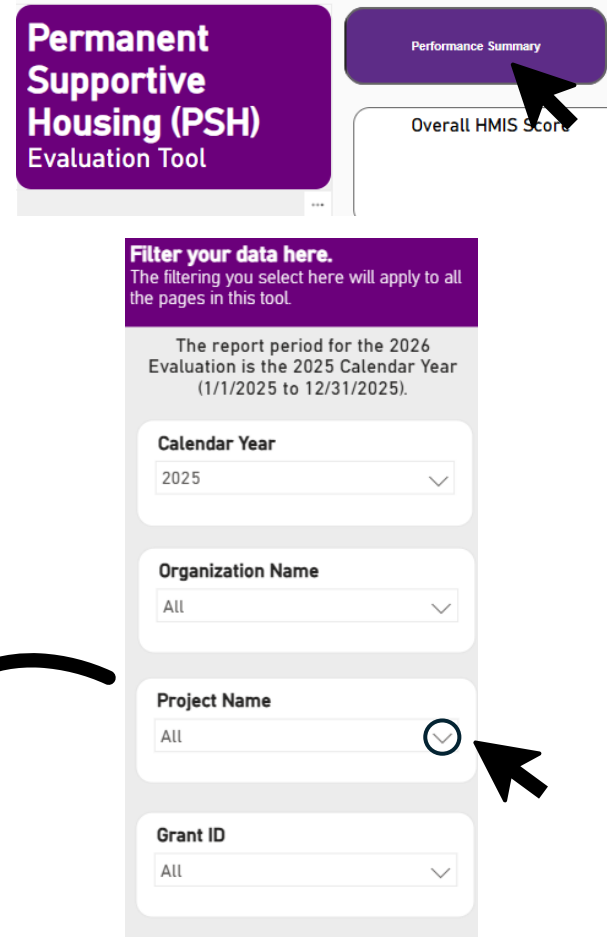
Performance

Data Quality



#### Choose your report filters:

1. Navigate to the **Performance Summary** page of the tool.
2. Navigate to the filters.
3. Select the calendar year, project, and/or grant you want to view by selecting the **dropdown arrow**. Then select the checkbox next to the project name or grant you want to select. You can also search for the grant or project in the search field.





# View your overall performance

The Performance Summary page shows the overall performance of a project or grant.

## Permanent Supportive Housing (PSH) Evaluation Tool

The PSH Evaluation Tool is designed to monitor and assess project performance. The metrics presented in this tool will be used in the NYC CoC annual evaluation.

### Tips for how to navigate this tool:

- Use the buttons at the top of the dashboard to move between pages in the tool.
- Hover over the information icons for more information about the metrics and visualizations.
- Parts of the tool are interactive. This means that you should be able to select a data point in a visual to see the associated client details in the tables (and vice versa). Read through the visual and table descriptions on each page for more information.

**Have questions?**  
Contact Tori Morris (morristo@dss.nyc.gov) on the HMIS team if you have questions about the tool.

Performance Summary   Utilization   Housing Stability   Income   Benefits   Data Quality

HMIS Overall Score: **TBD**

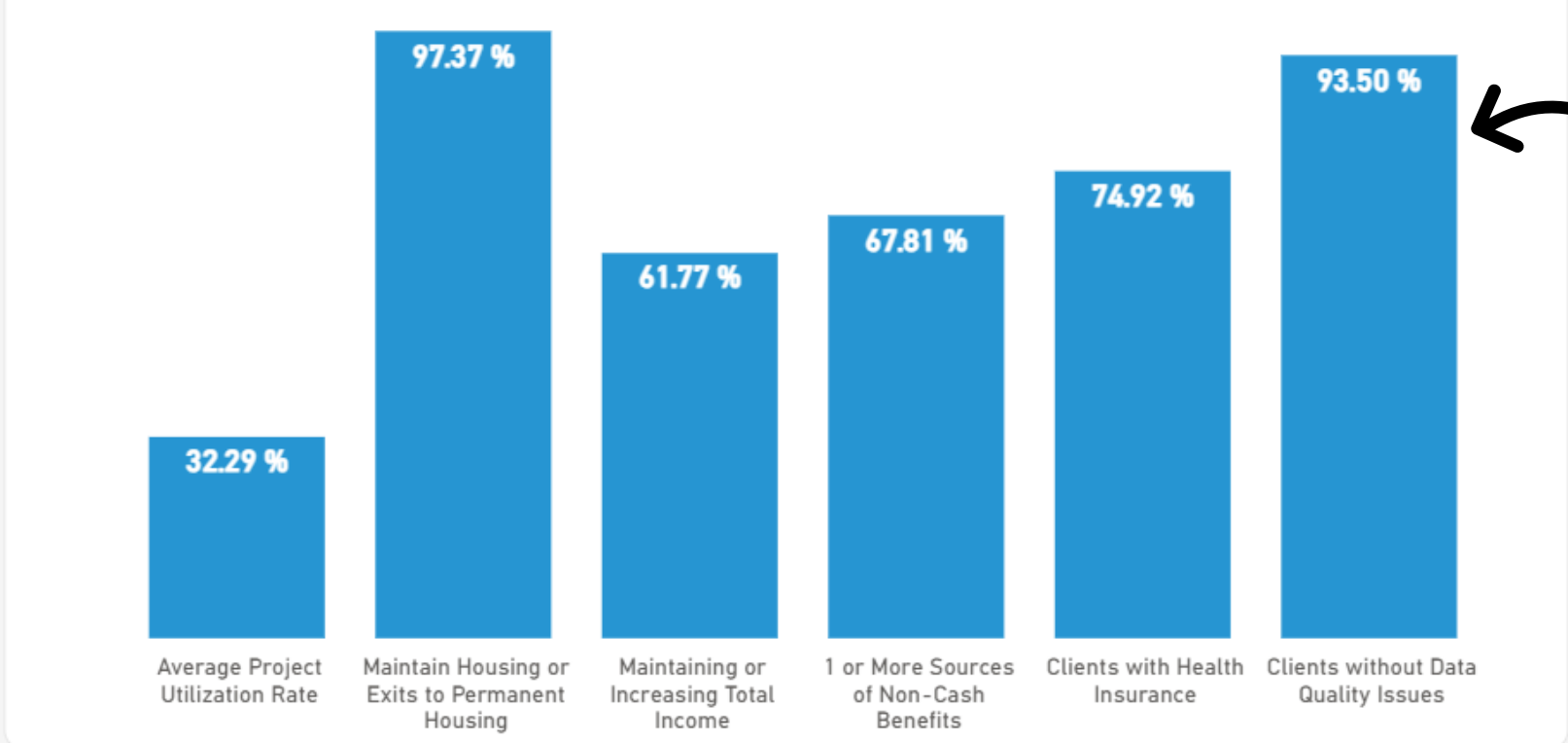
Total Number of Clients: **13,257**

Upload Timeliness: **54 %**

Latest Upload Date: **4/6/2026**

### Performance Metrics

This graph shows your project or grant's performance on key metrics.



**Filter your data here.**  
The filtering you select here will apply to all the pages in this tool.

The report period for the 2026 Evaluation is the 2025 Calendar Year (1/1/2025 to 12/31/2025).

Calendar Year: 2025

[Dropdown menu]

All

Grant ID: All

The bar graph shows performance on each of the key metrics used to calculate the overall HMIS score.



# Tips for how to use the Tool

The Tool uses a software called PowerBI. Below are some tips on how to utilize the Tool and PowerBI's features.

1. Read through all **descriptive text**, including subtitles for the visualizations and tables.

## Exit Destinations

Select any of the bars to see the associated client information in the Client Details table.

2. Read the **tooltips** for helpful information. You can see the tooltips by hovering over the ⓘ icons.

Upload timeliness is defined as files being uploaded within the first 15 days of the month. Click on this icon to see the file upload details. This metric is NOT included in the HMIS total score.

42 %

7/18

3. For the **detail tables**, you can **export the data to Excel** by selecting the three dots (...) and then "Export to Excel." Then select, "Data with Current Layout."

- *Note: for the visualizations (for example, bar charts) you can only export the summarized data not the individual client details.*

More options

THEN

Export data

Show as a table

Spotlight

Export data

4. You can **sort the detail tables** by either clicking on the column you want to sort by OR by selecting the three dots (...) and then selecting the field in the sort option.

ClientTrack ID

OR

Details

Project Name

[Redacted]

[Redacted]

[Redacted]

[Redacted]

ClientTrack ID

First Name

Last Name

Project Name

Entry Date

[Redacted]

[Redacted]

[Redacted]

Export data

Show as a table

Spotlight

Get insights

Sort descending

Sort ascending

Sort by

ClientTrack ID

991

06/21/1991

03/12/1992

03/12/1992

05/28/1992

05/28/1992

07/16/1992

07/16/1992

08/05/1992

08/05/1992

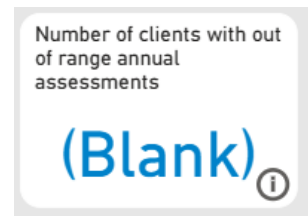
See answers to common questions about the Tool. Please review these FAQs before contacting the HMIS team.

## 1. Who can access the Tool?


- Only staff with access to ClientInsight can access the Tool.

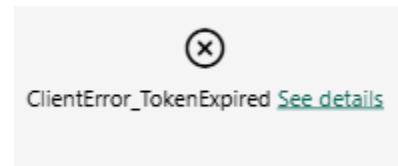
## 2. What does it mean when the Tool says (BLANK)?

- BLANK is the same as **ZERO** in the tool. For example, looking at the screenshot (BLANK) means **0 people** had out-of-range annual assessments.



## 3. Why do I keep seeing this ClientError\_TokenExpired error?

- This means that the Tool has been open without activity. If you see this error, you will need to refresh your browser tab. 



## 4. Why are the results in the tool not matching my source system?

- There can be a lot of reasons why the results are not matching. Here are some possible reasons:
  - a) There is an issue with your HMIS uploads. If client-level data is not matching your source data, please first check your HMIS upload files.
  - b) Double check that you reporting period is the same. For the 2026 evaluation, the 2025 calendar year is the reporting period.
  - c) There is a technical reason the results do not match such as vendor interpretation of the APR specifications.
  - d) There is an error in the report.

If you have checked your source files AND the reporting period, and you still don't understand why the Tool is not matching your source system please email Tori Morris at [morr isto@dss.nyc.gov](mailto:morr isto@dss.nyc.gov).