

Permanent Supportive Housing (PSH) Evaluation Tool

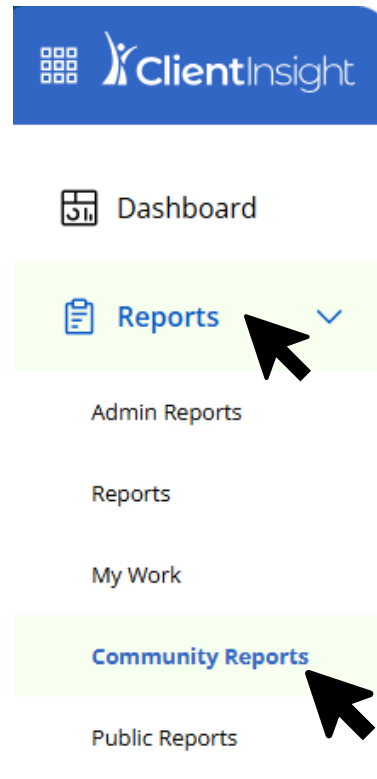
User Guide

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.**”

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



Permanent Supportive Housing (PSH)
Evaluation Tool

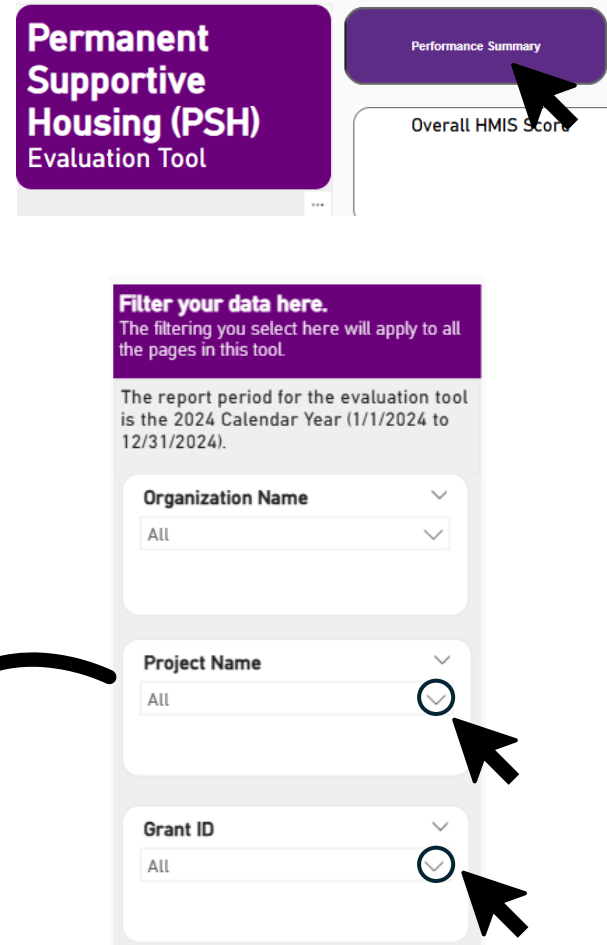
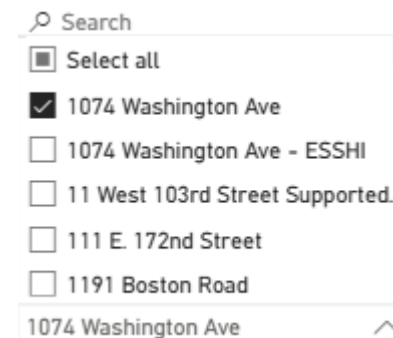
Custom

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 project 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.

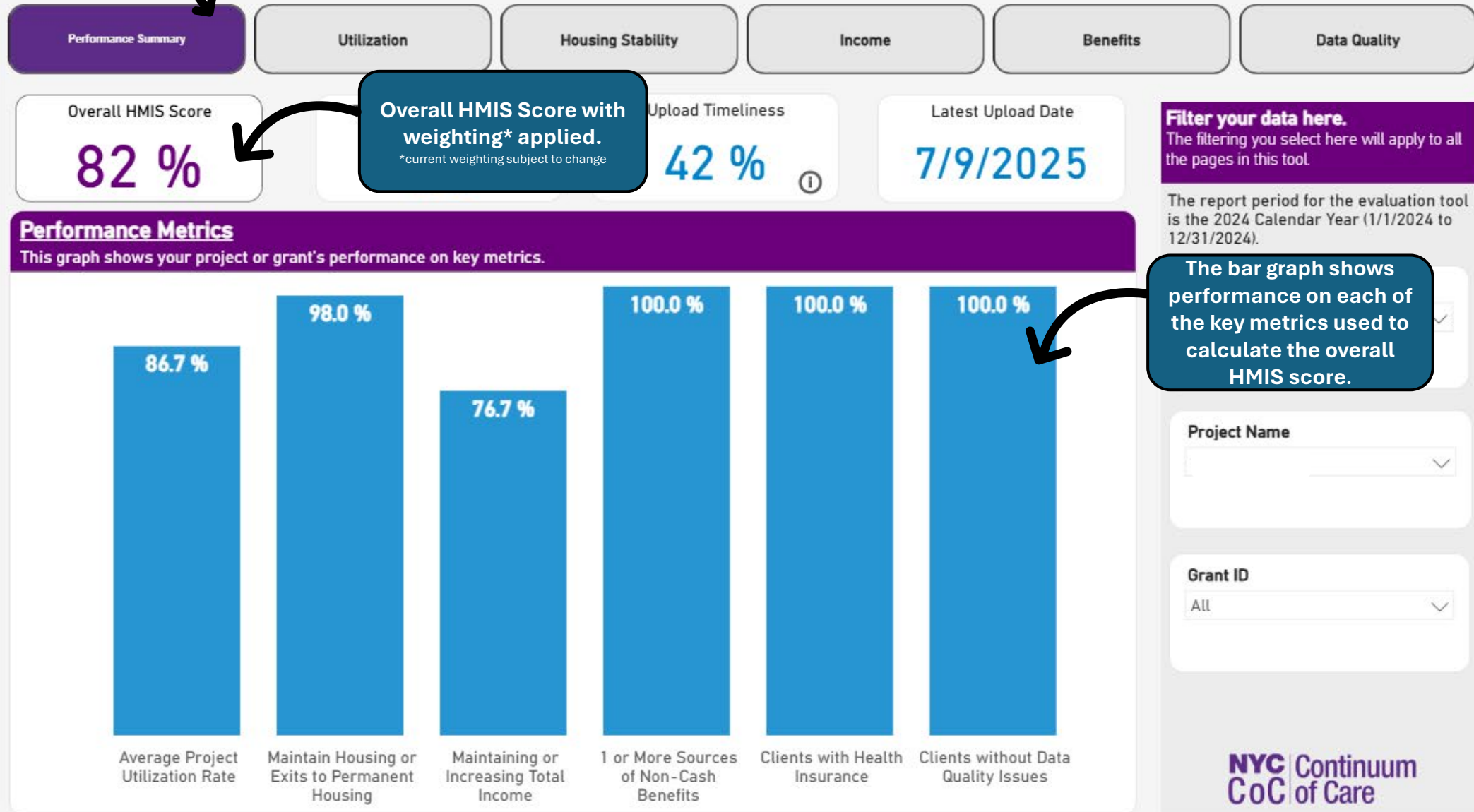
Permanent Supportive Housing (PSH) Evaluation Tool

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.





Dig-in to each metric and view client details

Each key metrics has a dedicated page that includes the overall metric score and client details.

Income

Overall Metrics

% of adult clients who maintained or increased total income

77 %

Number of clients required to have an annual or exit assessment

43

Number of clients missing an annual assessment

(Blank)

Number of clients with out of range annual assessments

(Blank)

How many clients lost, maintained, gained, or increased income from start to latest assessment (annual or exit)?

76.7 %

Maintaining or Increasing Total Income

27

SAME income as project entry

10

Had LESS income

Performance Summary

Utilization

Eligibility

Income

Benefits

Data Quality

Click on the grey buttons at the top of the page to navigate to the page you would like to view.

Click here to see clients required to have an assessment.

Click here to see clients missing an annual assessment.

Click here to see clients with out of range annual assessments.

Clients with Out of Range Annual Assessments

Select a client record below to see the client's records in the Income Records table.

ClientTrack ID	First Name	Last Name	ProjectName	Entry Date	Exit Date
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Each page will have *detail tables* that display the underlying data used to calculate the overall metric score.

All Income Records

This table shows all assessment records for each client.

ClientTrack ID	First Name	Last Name	ProjectName	Entry Date	Exit Date	Assessment Date	Assessment
				04/26/1997		04/26/1997	Project entry
				04/26/1997		04/26/2010	Annual assessment
				04/26/1997		04/26/2011	Annual assessment
				04/26/1997		04/26/2012	Annual assessment
				04/26/1997		04/26/2013	Annual assessment
				04/26/1997		04/26/2014	Annual assessment
				04/26/1997		04/26/2015	Annual assessment
				04/26/1997		04/04/2016	Annual assessment



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

Export data

Show as a table

Spotlight

Get insights

Sort descending

Sort ascending

Sort by

ClientTrack ID

First Name

Last Name

Project Name

Entry Date

ClientTrack ID

991

06/21/1991

05

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.

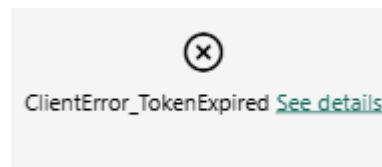
2. What does it mean when the Tool says (BLANK)?

- 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:
 - 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.
 - The report period does not match. The tool is programmed to use the **2024 calendar year** as the reporting period. Please check you are using the same report period.
 - There is a technical reason the results do not match such as vendor interpretation of the APR specifications.
 - 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 morristo@dss.nyc.gov.

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

5. What do I do if the Tool isn't loading or is taking a long time to load?

- Given the short timeline on the 2025 evaluation, this may mean that a lot of people are trying to access the Tool at the same time. A few tips for how to deal with this:
 - First, wait a few minutes and see if the Tool loads. In particular, the Performance Summary page, which is the first page you see, takes the longest to load. While the performance summary page loads, we recommend exploring another page as you wait.
 - Refresh your browser.
 - Try again at another time of the day. We know this is not ideal! However, it may be that you tried to access the report at the same time as many others. For example, right after a training or right before a deadline.

★ If you have tried these tips and are still having issues, please contact **Tori Morris** at morristo@dss.nyc.gov.

