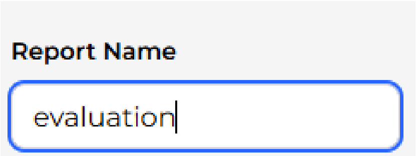
Permanent Supportive Housing (PSH) Evaluation Tool

User Guide

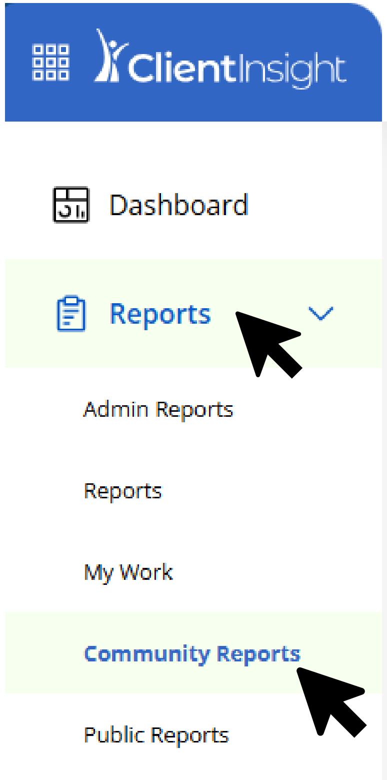
Getting Started

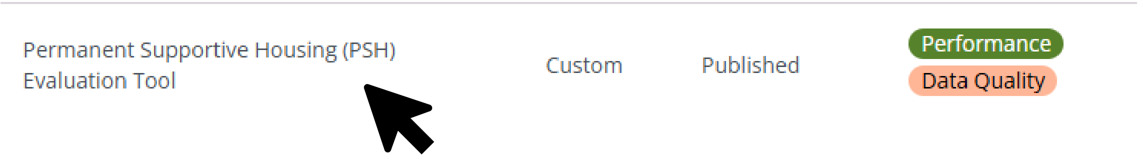
Opening the Tool in ClientInsight:

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.”**



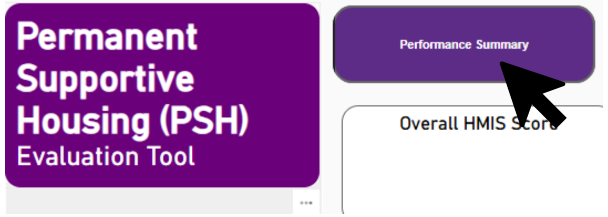
5. Select the report called “Permanent Supportive Housing (PSH) Evaluation Tool.”

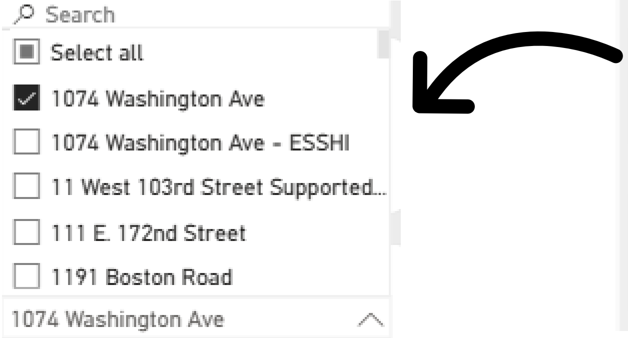


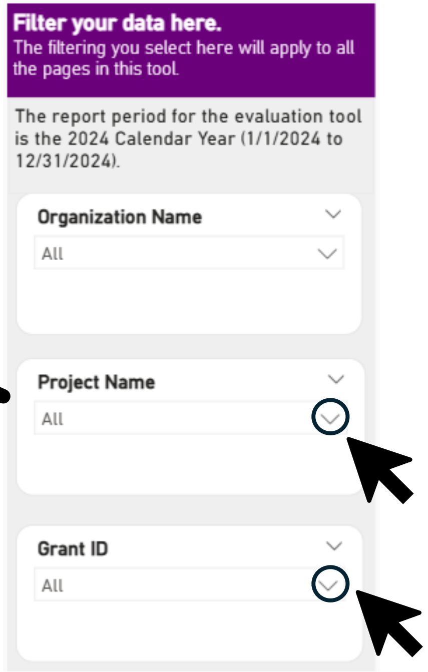


Choose your report filters:

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.

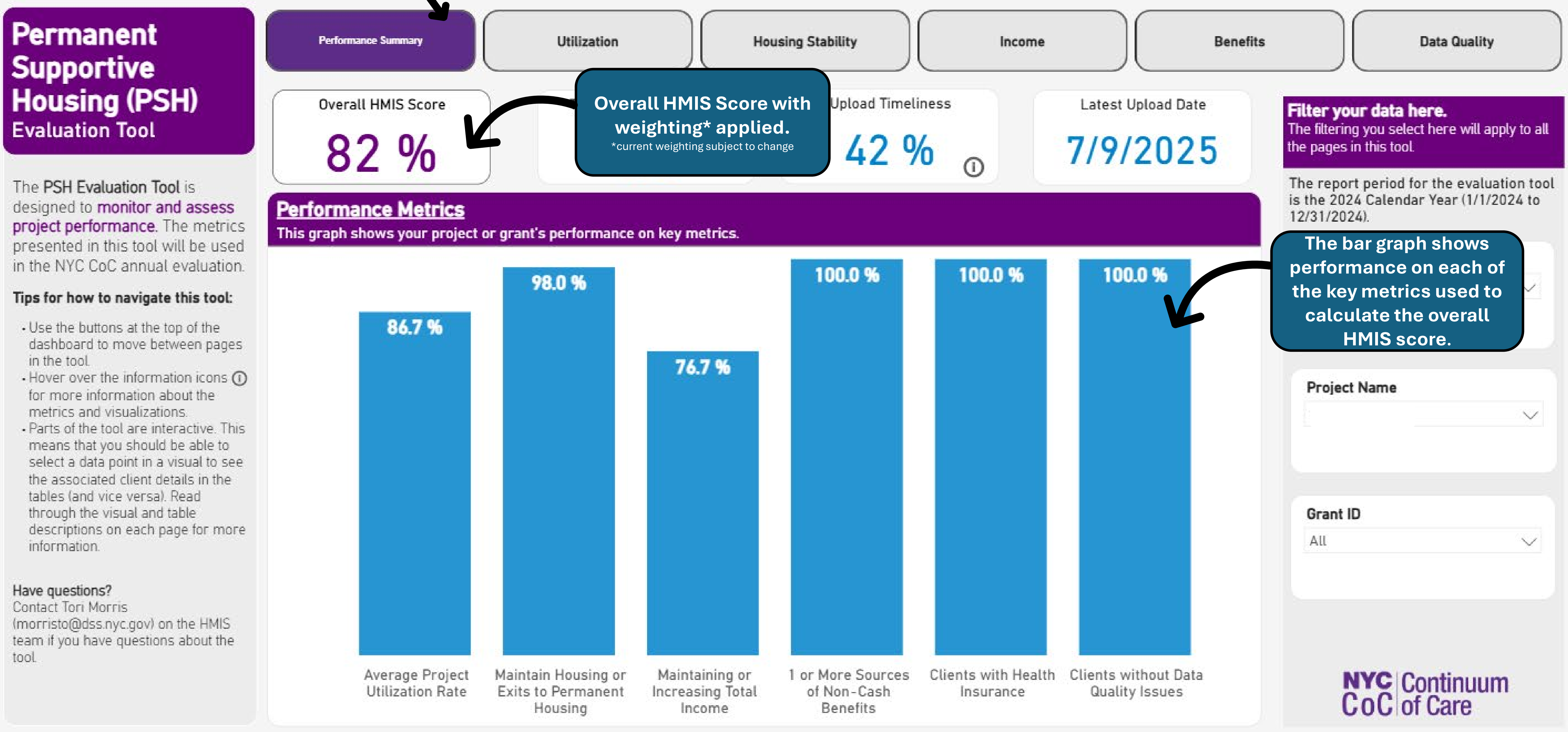






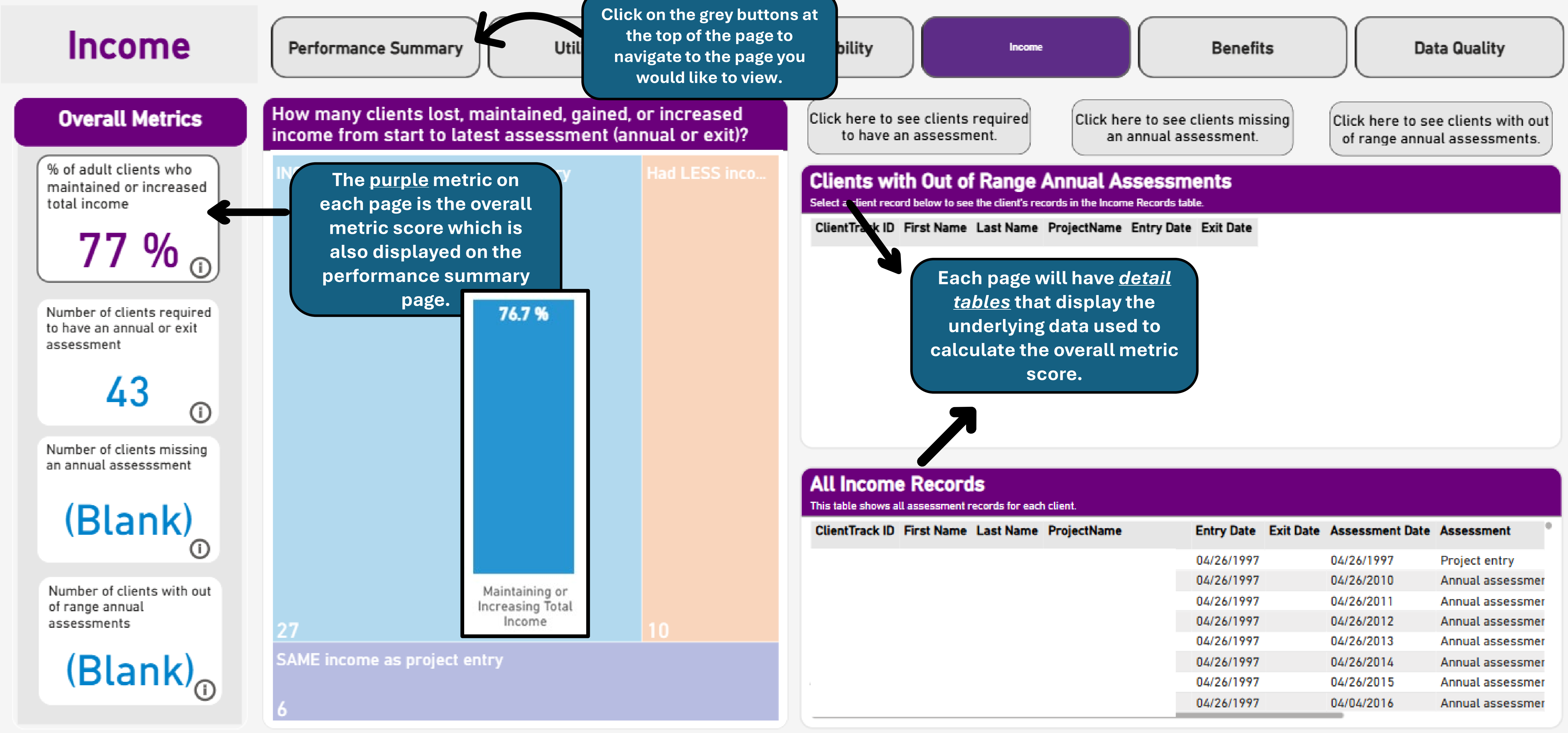
View your overall performance

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



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.

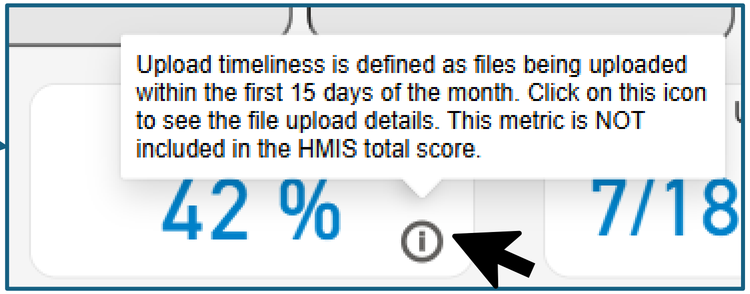


Tips for how to use the Tool

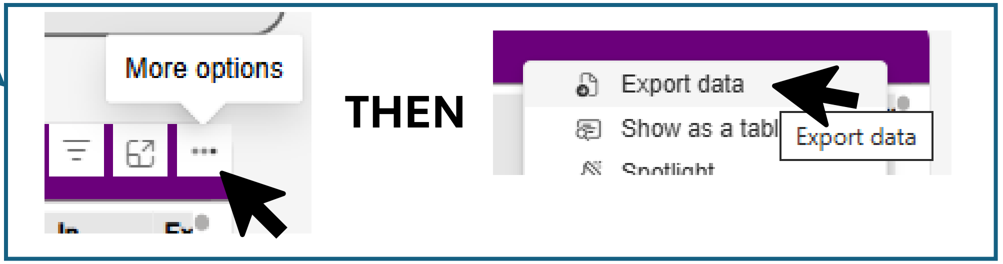
The Tool uses a software called PowerBI. Below are some tips on how to utilize the Tool and PowerBI's features.

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

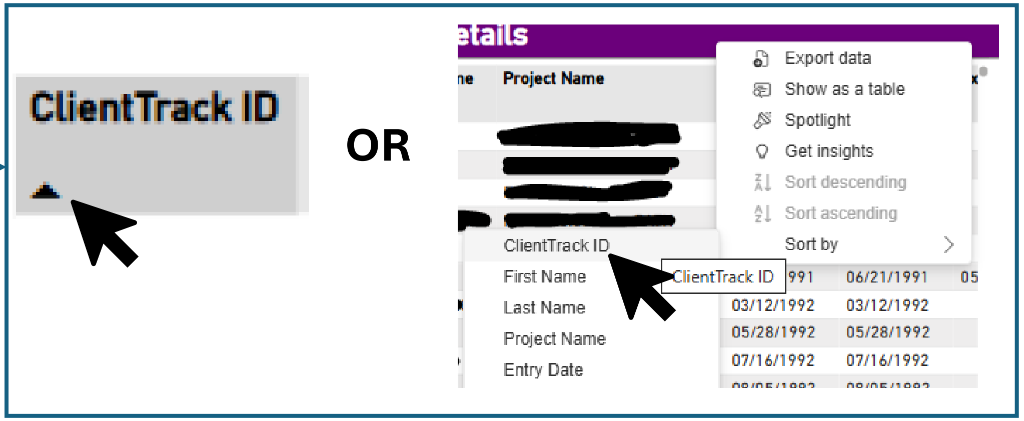
2. Read the **tooltips** for helpful information. You can see the tooltips by hovering over the ⓘ icons.



3. For the **<u>detail tables</u>**, 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.*



4. You can **sort the <u>detail tables</u>** 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.



FAQs

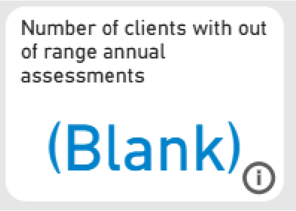
See answers to common questions about the Tool. Please review these FAQs before contacting the HMIS team.

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) 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.
    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 morristo@dss.nyc.gov.

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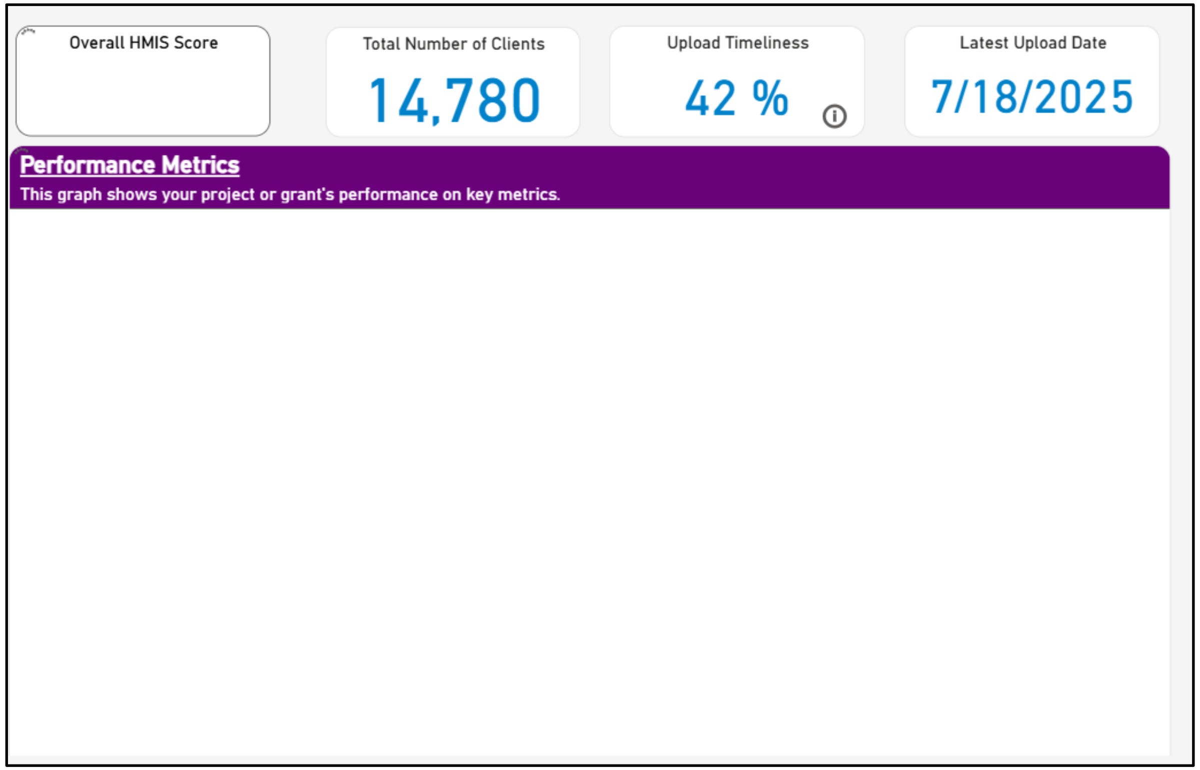
5. What do I do if the Tool isn't loading or is taking a long time to load?

- 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.**