



# DFSS Quarterly Reporting Training

For 2022 reporting



# Agenda

- **Introduction to DFSS Quarterly Reporting requirements**
  - Requirements
  - Sourcing data from HMIS
  - Reporting schedule
- **How to pull DFSS Quarterly Reports from ART**
  - Accessing the report
  - Using reference tables
  - Addressing data quality
  - Submitting the report
- **Update on performance metrics by program model for 2022**
- **Questions**



# Housekeeping

- Due to large volume of participants in today's training, all participants are muted.
- Please submit your questions using the question function of GoToWebinar.
- Information covered in today's webinar will be posted in an article on the HMIS Help Desk. A link will be sent to all ATAs following this webinar.
- This webinar will be recorded and included in the Help Desk article.



# DFSS Quarterly Reporting Overview

- Delegate agencies of the Department of Family and Support Services (DFSS) are required to submit quarterly reports as part of their grant.
- Reporting includes information on number of clients served, client demographics and service needs, services provided, and client outcomes. Required data elements vary by program model (e.g., shelter, engagement services, homeless prevention).
- DFSS uses this data to:
  - Report to funders
  - Monitor trends
  - Evaluate program results and performance



## DFSS Quarterly Reporting Overview (cont'd)

- Each program (not agency) supported with DFSS funding is responsible for submitting a quarterly report.
- **Reports should be emailed in Excel format to Maria LaMothe at [maria.lamothe@cityofchicago.org](mailto:maria.lamothe@cityofchicago.org).**
  - When submitting reports, please identify a back-up contact at your agency for quarterly reporting.
- Note that delegate agencies may have additional reporting requirements from DFSS depending on funding sources they receive (e.g., IDHS, ESG, CSBG, CHA). Agencies will receive separate communication from DFSS on these reporting requirements.



## Sourcing from HMIS

- Beginning in 2019, DFSS partnered with All Chicago to support DFSS delegate agencies in sourcing data for the DFSS quarterly reports from HMIS.
- The goals of sourcing DFSS reports from HMIS are to:
  - Reduce administrative burden on agencies, and
  - Improve the quality of data in our system to help make data-informed decisions

**Exception for DV Providers:** For agencies that serve survivors of domestic violence as their target population, they will have a DFSS Quarterly Excel template emailed to them.

Projects that use HMIS but for whatever reason do not input data for the project they are reporting on should email [helpdesk@allchicago.org](mailto:helpdesk@allchicago.org).



# Reporting Schedule

- Two reports are due for each project: **Quarterly Entry-Exit** and **Performance Outcomes** report.

2022 REPORTING SCHEDULE	
<u>REPORTING PERIOD</u>	<u>DUE DATE</u>
January - March	April 8, 2022
April - June	July 8, 2022
July - September	October 7, 2022
October - December	January 6, 2023

- Select programs also need to complete an **Open Cases** report.
  - **Shelter** -January and July Open Cases
  - **Youth Transitional Housing and Safe Haven** - January Open Cases

2022 OPEN CASES REPORTING SCHEDULE	
<u>REPORTING PERIOD</u>	<u>DUE DATE</u>
January 1, 2022 Open Cases	March 18, 2022
July 1, 2022 Open Cases (Shelter Only)	August 19, 2022

- Reports should be emailed in Excel format to Maria LaMothe at [maria.lamothe@cityofchicago.org](mailto:maria.lamothe@cityofchicago.org).



# Quarterly Reporting Changes for 2022

- Data elements on the **Quarterly Entry-Exit** report are consistent with previous years, in line with requirements from DFSS funders.
  - For programs previously funded by DFSS as "Emergency Shelters": For 2022, "Emergency Shelter" and "Interim Shelter" program models have been consolidated into one "Shelter" program model. Programs previously funded as "Emergency Shelters" will be required to report on additional metrics in 2022, including client departures.
- Metrics on the **Performance Outcomes** report have been slightly updated for several program models, based on feedback from the latest RFPs.



# Agenda

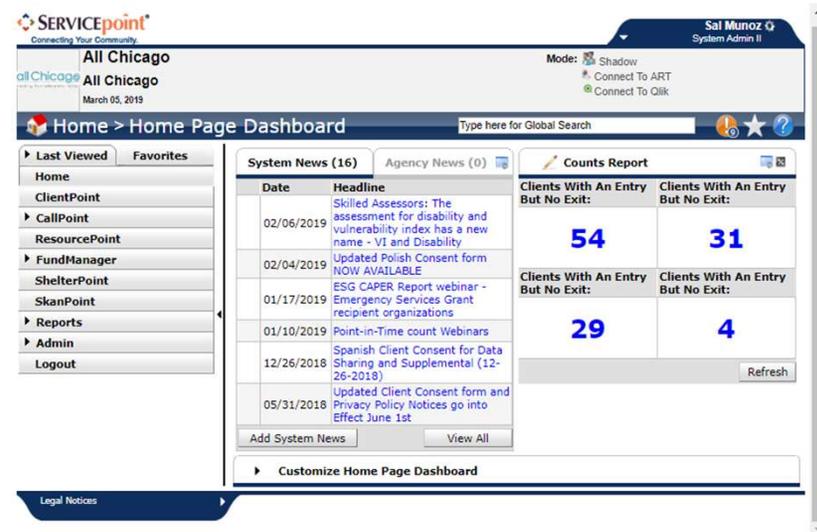
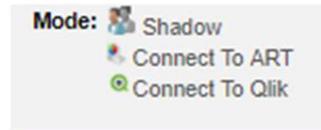
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# ★ Accessing The Report

The report will be downloadable only through the Advance Reporting Tool (ART) in HMIS.

This means only **Agency Technical Administrators (ATA)** or current HMIS users with an ART license will be able to download the report.

If you are unsure who your ATA is or are not able to download the report, email [helpdesk@allchicago.org](mailto:helpdesk@allchicago.org).



Sal Munoz System Admin II

Mode: Shadow  
Connect To ART  
Connect To Qlik

Home > Home Page Dashboard

Date	Headline
02/06/2019	Skilled Assessors: The assessment for disability and vulnerability index has a new name - VI and Disability
02/04/2019	Updated Polish Consent form NOW AVAILABLE
01/17/2019	ESG CAPER Report webinar - Emergency Services Grant recipient organizations
01/10/2019	Point-in-Time count Webinars
12/26/2018	Spanish Client Consent for Data Sharing and Supplemental (12-26-2018)
05/31/2018	Updated Client Consent form and Privacy Policy Notices go into Effect June 1st

Clients With An Entry But No Exit:	Clients With An Entry But No Exit:
54	31
Clients With An Entry But No Exit:	Clients With An Entry But No Exit:
29	4

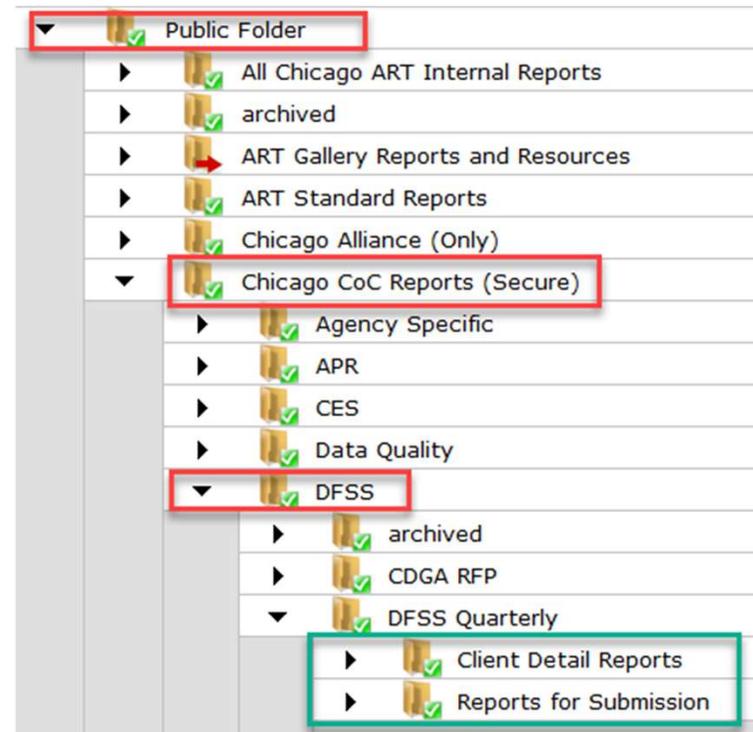
Refresh

Customize Home Page Dashboard

# ★ Accessing The Report

Once in ART, navigate through the following folders:

**Public Folder ->**  
**Chicago CoC Reports ->**  
**DFSS ->**  
**DFSS Quarterly**



# Scheduling The Report

These reports takes time to process in browser.

The best practice is to schedule the report.

**ART Item Details** 

**DFSS Performance Outcomes Detail...**

Name	DFSS Performance Outcomes Details - DO NOT SUBMIT - v2022_03_10
Description	
Creation Date	2022-03-10 08:38
Update Date	2022-03-10 08:38
Type	Webi
Owner	chicago_live:afuller

**ART Report** 

**Prompts**

Fill out each of the prompts below \*

Enter Providers for Report:

Enter Report Start Date:

Enter Report End Date (Plus One Day):

Enter Additional Service Providers (Optional):

Enter Providers for Report:

# ★ Scheduling The Report

When you get to this screen:

- Search for your project
- Select your project by clicking the green button
- After selecting the project, it will appear at the bottom
- Click submit

**Select Provider(s)**

**Search - Select Provider(s)**

Search for values with using keywords for their name.

Search

Batch Selection

Search Add Clear

**Search Results**

Name
<input type="checkbox"/> All Chicago - PSH(1415)
<input type="checkbox"/> All Chicago - Rapid Re-housing (RRH)(1155)
<input type="checkbox"/> All Chicago - Rapid Re-housing (RRH) Expansion Project(1376)
<input type="checkbox"/> All Chicago - Rapid Re-housing (RRH) - Interim Shelter(1158)
<input type="checkbox"/> All Chicago - RHY(1309)
<input type="checkbox"/> All Chicago - RHY REFERRALS(1454)
<input type="checkbox"/> All Chicago - Shelter Diversion Project(1781)
<input type="checkbox"/> All Chicago - SOAR(1799)
<input type="checkbox"/> All Chicago - SSVF(1431)
<input type="checkbox"/> All Chicago - SSVF - Rapid Resolution Project(1536)

Showing 51-60 of 1000 First Previous Next Last

**Selected Values**

Name
<input type="checkbox"/> All Chicago - PSH(1415)

Showing 1-1 of 1

Submit Cancel

# ★ Scheduling The Report

- Date prompts will be prepopulated in the report, but parameters may be updated and entered manually.
- Ensure that any reporting range you select for Report Start and End date are in line with the DFSS submission requirements

**ART Report**

**Prompts**

Fill out each of the prompts below \*

Enter Providers for Report:  
EDA Provider

**Enter Report Start Date:**

Enter Report End Date (Plus One Day):

Enter Additional Service Providers (Optional):

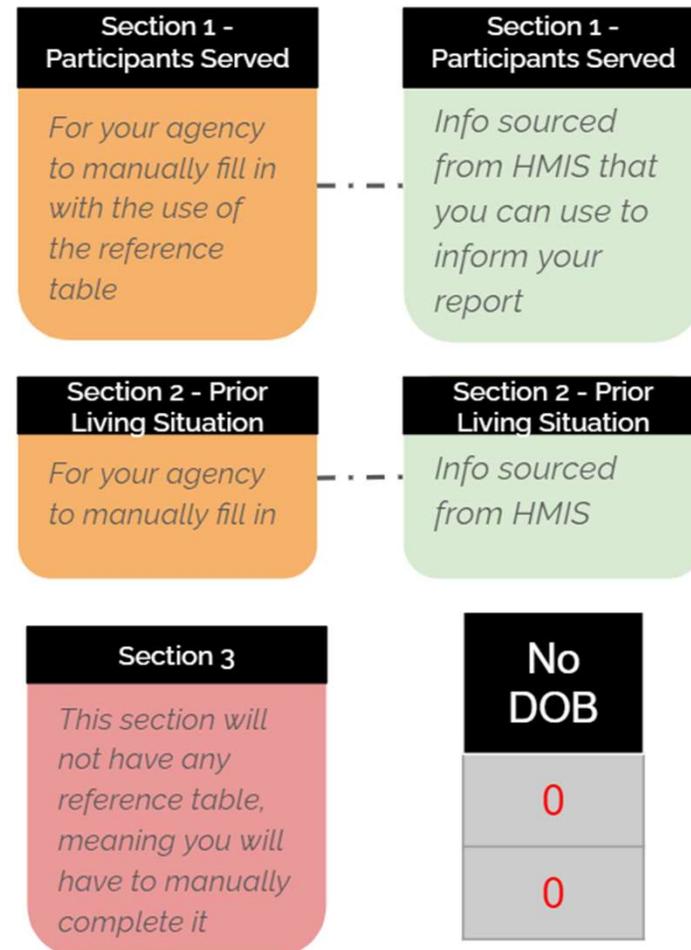
Enter Report Start Date:

01 / 01 / 2022 12 : 00 : 00 AM

Next

# ★ Using Reference Tables

- **Green** = The table has information that's sourced from HMIS
- **Orange** = The table requires **manual data entry**, but you have an HMIS reference table to use
- **Pink** = The table also requires **manual data entry**, but without the use of a reference table
- **Grey with Red Text** = Missing data, often referencing no date of birth entered
- **Yellow** = Totals



# Using Reference Tab

- The Quarterly Report includes the clients you had served that quarter.
- There are 13 sections to this report that are then broken down into smaller sub-sections.
- Not all program models will have to complete all 13 sections. Your template will reflect what you need to complete.

## Chicago Department of Family And Support Services - Division of Homeless Programs Delegate Agency Statistical Report - Homeless Services and Prevention Programs

### Summary of Entering and Exiting Clients

Chicago Program Model: Shelter

The green tables below are populated with data entered into HMIS.

Fill in all orange tables with the information provided in the green tables.

For Q2 2019, it is okay to fill in the orange tables with information from other sources if the data presented in the green tables is incorrect. You must provide an explanation for why it is incorrect with your submission.

Fill in all pink tables with information stored elsewhere. This information generally is not stored in HMIS.

If cells are blacked out, you do NOT need to fill them in.

#### Characteristics of Project Participants

**1. Participants Served during the quarter:**

	Households	Adults	Children	TOTAL
a. Number on the first day of the quarter				
b. Number entering program during the quarter				
c. Number who left the program during the quarter				
d. Number in the program on the last day of the quarter				

1b. Total Households (Und) ENTERING the program (use ServicePoint household counts from right)		1c. Total Households (Und) EXITING the program (use ServicePoint household counts from right)	
Single Male		Single Male	
Single Female		Single Female	
Couple No Child		Couple No Child	

**1. Participants Served during the quarter (from HMIS)**

	Households	Adults	Children	No DOB	TOTAL
a. Number on the first day of the quarter	12	11	21	0	32
b. Number entering program during the quarter	16	15	30	0	45
c. Number who left the program during the quarter	8	8	15	0	23
d. Number in the program on the last day of the quarter	20	18	36	0	54

1b. Total Households ENTERING the program (ServicePoint household types)		1c. Total Households EXITING the program (ServicePoint household types)	
Female w/ child	15	Female w/ child	8
Single Female	1	TOTAL	8
TOTAL	16		

# ★ Using Reference Table

- The Performance outcomes report is due for everyone.
- The report will automatically grey out any sections not pertinent to your program type.

Chicago DFSS Quarterly Reports Performance Outcomes				
See the Performance Outcomes - B tab for your project's information.				
Provider				
Report Start Date	1/1/22			
Report End Date +1 Day	4/1/22			
Date Report Run	3/10/2022 3:51 PM			
Chicago Program Mode	Shelter			
DFSS Program Model	Shelter serving families or families and single adults			
	Total	# Achieving Outcome	% Achieving Outcome	How is this calculated? (Only clients marked with their Relationship to Head of Household as "Self (head of household)" are included in this calculation.)
A. % of households exiting to more stable housing	8	2	25.0%	TOTAL: All exits from the project. ACHIEVING OUTCOME: EMERGENCY SHELTERS: Anyone exiting to the following during the quarter are considered exits to more stable housing: Foster care home or foster care group home; Long-term care facility or nursing home; Psychiatric hospital or other psychiatric facility; Residential project or halfway house with no homeless criteria; Staying or living with family, temporary tenure (e.g., room, apartment or house); Staying or living with friends, temporary tenure (e.g., room apartment or house); Substance abuse treatment facility or detox center; Transitional housing for homeless persons (including homeless youth). ACHIEVING OUTCOME: DROP-IN CENTERS/OUTREACH and FUSE: Any to a destination listed under Emergency Shelters, plus the following are considered exits to more stable housing: Emergency shelter, including hotel or motel paid for with emergency shelter voucher; Hospital or other residential non-psychiatric medical facility; Hotel or motel paid for without emergency shelter voucher.
B. % of households exiting to permanent housing	8	4	50.0%	TOTAL: All exits from the project. ACHIEVING OUTCOME: Anyone exiting to these destinations during the quarter will be considered exiting to permanent housing: Owned by client, no ongoing housing subsidy; Owned by client, with ongoing housing subsidy; Permanent housing (other than RRH) for formerly homeless persons; Rental by client, no ongoing housing subsidy; Rental by client, with other ongoing housing subsidy; Rental by client, with RRH or equivalent subsidy; Rental by client, with VASH subsidy; Staying or living with family; permanent tenure; Staying or living with friends, permanent tenure; Safe Haven.
C. Average # of days in program	136.9			For everyone exiting the project during the quarter, the average is calculated for the number of days between the date the client started staying at the project until the date they exited the project.



# Live Example



## Submitting The Report

- Your reports should be saved as an Excel file with your agency and project name, and the type of report it is. The easiest method to name these files will be when you schedule them in ART.
  - {Agency}\_{Project}\_Performance\_Outcomes
  - {Agency}\_{Project}\_Quarter\_Report



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# Performance Metrics Updates

SV0

- Many program models had an opportunity to give input regarding performance metrics during last year's RFP process.
  - This input was immensely helpful and interesting for us to review, and we thank any organizations that made suggestions in their RFPs!
- Based on that RFP input, a desire to align performance outcomes with the COC program models chart, and further internal conversation, there were updates made to performance metrics for a handful of program models.
  - Additionally, some program models did not receive changes to required performance metrics for Q1 2022 but may in the future.
- Conversation and review of performance metrics for all program models is an ongoing and continually evolving process. If you have any questions or concerns regarding the performance metrics collected for your program model, please do not hesitate to reach out.

## Slide 21

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**SV0** Is this the correct wording? How would providers best understand what we mean by this?

Sarah Valek, 2022-03-03T21:01:36.055

**KHO 0** I think this is great!

Kimberly Howard, 2022-03-10T22:39:13.859

# ★ Changing 2022 Performance Metrics

Program Model	Program Model Subcategory	2022 Performance Metrics for Quarterly Reporting	Changes for 2022
<b>Shelter</b>	N/A	<ul style="list-style-type: none"> <li>Households exiting to more stable housing – total, #, %</li> <li>Households exiting to permanent housing – total, #, %</li> <li>Average # of days in the program</li> <li>% and # of Households with complete CES assessments</li> <li>DV-specific metric: #/% of Households learning about safety planning/the cycle of violence</li> </ul>	Added CES metric from the Shelter scope to Q1 reporting.
<b>Frequent Users Service Engagement (FUSE)</b>	N/A	<ul style="list-style-type: none"> <li>Households exiting to more stable housing – total, #, %</li> <li>Households exiting to permanent housing – total, #, %</li> <li>% of Households that exited to another shelter program.</li> </ul>	Added Households that exited metric from the FUSE scope to Q1 Reporting.
<b>Centralized Shelter Intake</b>	N/A	<ul style="list-style-type: none"> <li>Shelter placement requests completed within 3.5 hours – total, #, %</li> <li>Shelter placement requests completed within 5 hours – total, #, %</li> <li>Well-being checks completed within 3.5 hours – total, #, %</li> <li>Transportation requests completed within 3.5 hours – total, #, %</li> <li>Transportation requests completed within 5 hours – total, #, %</li> </ul>	Removed two manual performance metrics that no longer align with the program model from Q1 reports: <ul style="list-style-type: none"> <li>HHs contacted through outreach efforts accepting one or more basic assistance services (i.e., clothing, transportation, etc.)</li> <li>HHs contacted through outreach efforts connected to community-based case management, housing, or appropriate settings (hospital, family reunification, etc.)</li> </ul>

# No Immediate Changes to Metrics

Program Model	Program Model Subcategory	2022 Performance Metrics for Quarterly Reporting	Changes for 2022
<b>Coordinated Entry System Facilitator</b>	N/A	<ul style="list-style-type: none"> <li>Households assessed for Coordinated Entry – #, %</li> <li>Available units/openings in the Coordinated Entry system that receive a match through HMIS – #, %</li> <li>% of Households enrolled in an outreach or housing system navigation project that have a housing match through CES and move into permanent housing.</li> <li>% of participating agencies (including Applicant and recruited partner agencies) that assess Households or connect Households to entities conducting the CES assessment.</li> </ul>	No Immediate changes.
<b>Youth Transitional Housing</b>	N/A	<ul style="list-style-type: none"> <li>Households exiting to more stable housing – total, #, %</li> <li>Households exiting to permanent housing – total, #, %</li> <li>Average # of days between referral and placement.</li> </ul>	No Immediate changes.
<b>Permanent Supportive Housing Supportive Services</b>	PSH	<ul style="list-style-type: none"> <li>Households who remain housed for 12 months – total, #, %</li> <li>Households assuming the apartment lease or exiting to other independent, stable housing within 2 years – total, #, %</li> </ul>	No Immediate changes..
	Safe Havens	<ul style="list-style-type: none"> <li>Households who remain housed for 12 months – total, #, %</li> <li>Clients engaged in supportive services – total, #, %</li> </ul>	
<b>Rapid Rehousing</b>	N/A	<ul style="list-style-type: none"> <li>Households exiting to more stable housing – total, #, %</li> <li>Households exiting to permanent housing – total, #, %</li> </ul>	No Immediate changes.

# No Immediate Changes to Metrics

Program Model	Program Model Subcategory	2022 Performance Metrics for Quarterly Reporting	Changes for 2022
<b>Engagement Services</b>	Outreach/Drop-In	<ul style="list-style-type: none"> <li>Households exiting to more stable housing – total, #, %</li> <li>Households exiting to permanent housing – total, #, %</li> <li>Households engaged in case management – total, #, %</li> </ul>	No Immediate changes.
	Housing System Navigators	<ul style="list-style-type: none"> <li>Participants enrolled with system navigators – total, #, %</li> <li>System Navigator enrolled clients permanently housed – total, #, %</li> </ul>	No Immediate changes.
<b>Homeless Prevention Assistance</b>	N/A	<ul style="list-style-type: none"> <li>Clients remaining in permanent housing after crisis intervention – total, #, %</li> <li>Households who remained housed for 12 months – total, #, %</li> </ul>	No Immediate changes.
<b>RAP Manager</b>	N/A	<ul style="list-style-type: none"> <li>% of third-party payments to property owners or their agents made within five business days of receipt from DFSS.</li> <li>% of all assisted units meet HUD habitability standards prior to providing rental assistance.</li> <li>Average # of days before payment is made to property owner or manager.</li> </ul>	No Immediate changes.



# New Program Model

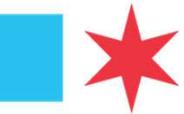
Program Model	Program Model Subcategory	2022 Performance Metrics for Quarterly Reporting	Changes for 2022
<b>Diversion</b>	N/A	<ul style="list-style-type: none"> <li>The % of clients who have a diversion conversation and find an alternative to shelter.</li> <li>The % of clients who find an alternative to shelter and do not return to shelter for 30 days.</li> <li>The % of clients who find an alternative to shelter and do not return to shelter for 60 days.</li> <li>The % of clients who find an alternative to shelter and do not return to shelter for 90 days.</li> <li>Average number of days from check request from client to payment made to property owner/managers.</li> </ul>	New Program Model and metrics.

DFSS and All Chicago will follow up with agencies participating in the Diversion pilot with instruction on how to submit all required reports for Q1.



## Key Reminders

- Please submit reports in Excel format by the deadline to Maria LaMothe at [maria.lamothe@cityofchicago.org](mailto:maria.lamothe@cityofchicago.org).
- When submitting the Q1 report, please identify a back-up contact at your agency who understands the quarterly reporting process and can respond to any questions from DFSS.
- Please email [helpdesk@allchicago.org](mailto:helpdesk@allchicago.org) with any questions.



**Thank you!**