communityshelterboard

Meeting Minutes

CSP All Agencies Administrators Meeting

September 9, 2020 10:30 am – 12:30 pm
Location: GoToMeeting
Attendees: CHN – Stan, Branden; Equitas – Courtney; GCH – Samantha; HFF – Sarah, Tiffany; Homefull – Theresa; HuckHouse – Amanda; LSS – Cara, Joy; Maryhaven – Taylor; NCR – Marsha; TSA – Brittani; VA – Rich; VOAOHIN – Betsy, Rohelle, Lori; YMCA – Angela, Kevin, Colton; YWCA – Betty, Christina; Community Shelter Board-Lianna Barbu, Thaddeus Billman, Travis Theders, Jeremiah Bakerstull

A. **Welcome and Flow**
   1. Travis went over the flow of the meeting.
B. **QA Clarifications**
   1. Travis clarified various QA issues he has been seeing lately
      a) Clearing incorrect values
         i. When correcting a value that previously had an incorrect value answered by your agency, please use the history bar to the left of the field to delete the incorrect value if it has the same effective date and time as the now correct value. This will prevent having two values for the exact same date and time, which could cause issues with reporting.
         ii. The questions under the Living Situation section have conditional logic and will not let users delete historical values in this way. Please contact Travis if you need to delete an incorrect value from this section.
      b) End dates
         i. We want to avoid overlap of end dates and start dates on sub-assessment records. For example, if a client's income changes from $800 to $1200, the Start Date of the $1200 record should be one day later than the End Date of the $800 record. Otherwise, the system will count both income records as active on the overlapping date.
         ii. As a reminder, End Dates on sub-assessment records mean the record is active through that date. So, if a client loses their income prior to exit, the income sub-assessment record should be end dated at least one day prior to the Project Exit Date, not the same day as the exit date.
      c) Disabling Condition
         i. Disability sub-assessment records should be created for all disabilities, however, the "Does the Client Have a Disabling Condition" question should only be answered "Yes" if one of the Disabilities meets the below criteria:
            (1) a physical, mental, or emotional impairment which is
               (a) expected to be of long-continued and indefinite duration,
               (b) substantially impedes an individual's ability to live independently, and
               (c) of such a nature that such ability could be improved by more suitable housing conditions;
            (2) a developmental disability as defined in section 102 of the Developmental Disabilities Assistance and Bill of Rights Act;

(3) the disease of acquired immunodeficiency syndrome (AIDS) or any conditions arising from the etiological agency for acquired immunodeficiency syndrome

If the question "Does the Client Have a Disabling Condition" is answered "Yes", at least one of the disability sub-assessments must be completed.

ii. A hover-over tip has been added to CSP to remind users of the disability guidelines.

d) Housing Move-In Date

i. This field is becoming increasingly more important in HUD reports to separate RRH and PSH clients who are housed vs those who are not yet housed. For RRH projects, we need to start entering Housing Move-In Dates in a more timely manner, rather than waiting until project exit. Please use an update/interim record to enter a client's Housing Move-In Date once the date is known, following our existing data quality rule that all data should be entered by the 4th working day of the following month. Using back-date mode is not necessary as long as the date of the interim assessment itself is set to the housing move-in date.

e) TAY Assessment

i. Travis clarified that the TAY Assessment needs to be answered for all adults that are part of TAY Households (households where all adults are between 18-24 years of age). The group discussed the potential to collect data on the TAY Assessment for all 18-24-year-old clients, regardless of whether the household is TAY or not. It was decided that we would continue as is – collecting for only TAY Households – but if improvement in data completeness is not seen, we will have to start collecting for all 18-24-year-olds.

f) Guided QA Report Review

i. Travis will start reviewing QA reports with some agencies on a monthly/quarterly basis to ensure all Admins know how to find and identify all errors flagged on the QA reports.

C. CSP User Survey Results

1. Lianna reviewed the results of the 2020 CSP User Survey. Please review the attached survey results for full details.
2. Question #5 looks at if CSP Training provided by the CSB Admin meets agency needs. 84% answered "Yes", while 16% answered "No." Travis addressed some of the training needs noted by the survey in the Online Training section below.
3. Question #8 asks if the CSP Admin Meetings are valuable. 79% answered "Yes", while 21% answered "No." CSB would like suggestions on how to make the admin meetings more interactive and useful. In the future, CSB will issue a quarterly email with relevant updates in place of holding an admin meeting if there are not enough topics to warrant open discussion. Per Rich's suggestion, Travis will issue the Admin Meeting agenda ahead of the meeting date and ask for admin input on additional topics. Co-leading the admin meeting is also a good option, this option will be included with the meeting agenda issuance.
4. Question #9 asks if the user believes each of the following are true:
   a) CSB is responsive and flexible in carrying out its role. Only 58% answered "Yes." This is lower than previous years.
   b) CSB possessed the required technical expertise commensurate with the requirements of the project. 84% answered "Yes."
   c) CSB provides timely support of technical matters. 90% answered "Yes."
   d) CSB is responsive to the changing requirements of partner agencies. Only 47% answered "Yes." This is a very low rate and CSB would like feedback on what the specific issues are and how we can improve.

e) CSB generally accommodates special issues brought to it by partner agencies. This question was unfortunately left off of the survey by mistake, so we do not have any data for 2020.
f) CSB communications, related to CSP, are timely, clear, and appropriate. Only 68% answered "Yes."

5. In looking at the results overall, there is a decline in quality of support and responsiveness from CSB to Agency Admins. CSB reviewed the attached survey comments and requested feedback. Additionally:
   a) The role of CSB in training new users was clarified. Training is primarily the responsibility of agency administrators with CSB providing resources to facilitate. Direct, site-based training of all new users by CSB is not feasible.
   b) Travis and Thaddeus clarified the PR&C scoring system and how points are decided. The data elements reviewed during PR&C can be found in the Monitoring Guide found at https://www.csb.org/providers/monitoring. When reviewing client files for PR&C, each file has a maximum number of points that can be awarded based on the data elements from the Monitoring Guide that apply (i.e. not all data elements apply to all client age ranges or all project types). A point is awarded for that data element as long as the value in the client's file and the value in CSP match. Accuracy percentage for the project is then determined by dividing the total number of points awarded by the total number of points possible. Travis and Thaddeus will start including point totals, alongside accuracy percentage on PR&C Exit Interviews.
   c) CSB will make sure all data requirements and CSP changes are more clearly communicated.
   d) Travis will make sure data field drop-down menus do not start with non-letter characters. The only known issue is in the upcoming Coordinated Entry data fields, which Travis is working with Wellsky to address. Please send any other examples to Travis via email.
6. Travis will issue another anonymous survey to allow Admins to provide more detailed feedback on specific issues and ways we can improve. Suggestions and feedback can also be given directly to any member of the data team via email. Our goal is to provide quality service to our partners, but we need help identifying the specific issues and ways we can improve.
7. The CSB Data Team will also begin holding monthly office hours where admins can join a virtual meeting, to ask questions or bring up other issues.

D. Online Training

1. Travis is looking for ways to make video training more engaging and useful. He will begin making supplemental interactive courses for some trouble areas of data entry such as sub-assessments. Due to software limitations, these new training videos can only be made available to a small number of people at one time, so they will be reserved for users who need additional training after failing a certification test or prior to certification upon request of the user's Agency Admin. If you are seeing users struggling with a particular video or have other suggestions for how to improve our current training process, please reach out to Travis.

E. HMIS RFP

1. Thaddeus discussed that CSB will likely be issuing an RFP for a new HMIS system due to a lack of progress on ServicePoint 6 development and rapidly aging, rigid HMIS system. Admin feedback showed concern for both quality of data migration and functionality and accessibility of the current reporting tool. These are both major concerns for the CSB Data Team as well. CSB's proposed RFP schedule is allowing for 4 months of data migration and user training during the transition. A quality reporting tool that makes extracting data from the system easy and allows users to generate their own reports is a high priority.

2. No one expressed opposition to doing an RFP. We will most likely issue the RFP in October and request partner feedback on potential new systems in December or January.

F. Coordinated Entry Data Elements

1. Beginning October 1st, all projects will be required to collect new HUD-required data elements around Coordinated Entry – Coordinated Entry Assessment and Coordinated Entry Event. Data elements will be made available by September 21 to give users a chance to get used to entering this data before the official go-live date.
2. Travis reviewed the data entry process with attendees. Please be on the lookout for forthcoming training videos which will describe the process in detail for all project types.
3. A Coordinated Entry Assessment record will be created as either a "Crisis Needs Assessment" (Homeless Hotline, Outreach, Gladden Diversion) or a "Housing Needs Assessment" (Rapid Rehousing, Emergency Shelter, others as needed). This will typically be created at the first meeting with a project case manager (or diversion specialist).
4. The Coordinated Entry Event record will document the outcome of the Coordinated Entry Assessment – Diverted, Referral to Shelter, RRH, PSH, etc. This may occur at the same time as the entry assessment or at a later date, as needed to document referrals.
5. A client can have multiple entries for each record type. Only heads of households need Coordinated Entry data elements.
6. The end date field can be ignored for all assessments/events.
7. Coordinated Entry data does not need to be documented in the paper file – electronically in CSP is sufficient. These data elements will not be made part of the PR&C.

G. Agency Administrator Structure

1. CSB recognizes that the primary and secondary admin designations may not make sense for the way some partner agencies operate. For example, one admin may handle all data for one project, while a second admin may handle data for a different project. As such, we will be removing the "primary" and "secondary" identifiers. Please let us know if a specific admin at your agency should be the "lead" on emails from CSB regarding data concerns for specific projects.

H. Admin of the Year

1. Rich Agnello from the VA was recognized as Admin of the Year for FY20 for his proactive approach to data quality, care for data accuracy, and reliability and consistency as a CSP administrator.

I. Next Meeting date TBD – Late 2020

J. Adjourn