HMIS Job Aid

Special Job Aid for 2023 ROI Round Up Efforts

Running the ROI Error Reports

Maintaining valid ROIs for our clients is an important part of our work in the Homeless Management Information System. Our ROIs last for seven years, but many of our clients have been in the system for longer. There are also several categories of ROIs and we use different categories based on the client's age and situation. As we are creating this job aid, we are undertaking a huge effort to address the high number of ROI errors; the main one being our current reliance on the Verbal Consent ROI category, which originated in March 2020 as a temporary solution to the pandemic quarantine mandates.

The different ROI reports include:
- ROI NEEDED: Aged into Adulthood
- ROI NEEDED: Minor Documentation Error
- ROI NEEDED: Missing
- ROI NEEDED: Signed Paper Document
- ROI NEEDED: Verbal Consent

How to Find the ROI Error Reports

ROI Reports should be run monthly to ensure that your agency does not have any clients with missing or faulty ROIs. These reports can be run by most HMIS End Users (including those with Direct Service Staff, Supervisory, or Administrative level access). To find these reports, first click on the launch pad (aka waffle) on the top right of the screen and then choose "Reports".
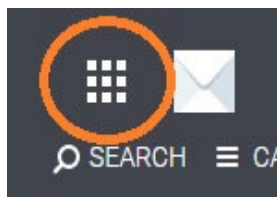
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While the canned reports are all located in the Report Library, all custom reports created for your agency live in the Data Analysis section. Click the carrot on the right to open up the reports for your specific agency and you will find all five of the ROI reports. You will need to run each one separately to check for any ROI errors.
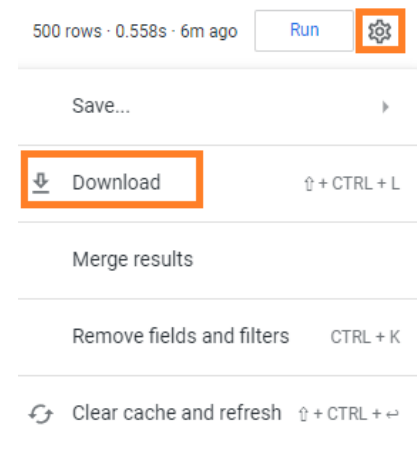
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Running the ROI Error Reports

Unlike canned reports, the custom reports run automatically. They will take a moment to load as they run, so please be patient. When they load, they will load the visualization of the data. While this can be useful for other reports, for this data it does not provide much information. Using the carrots next to the titles, you can close the visualization tab and open up the data tab to see the data table itself. While you can work from this website space, we recommend that you download the data from this report into an excel document. This will allow you to share the data with other staff members, adjust the information if needed (filter, sort, color code, etc), and save the report for future use.
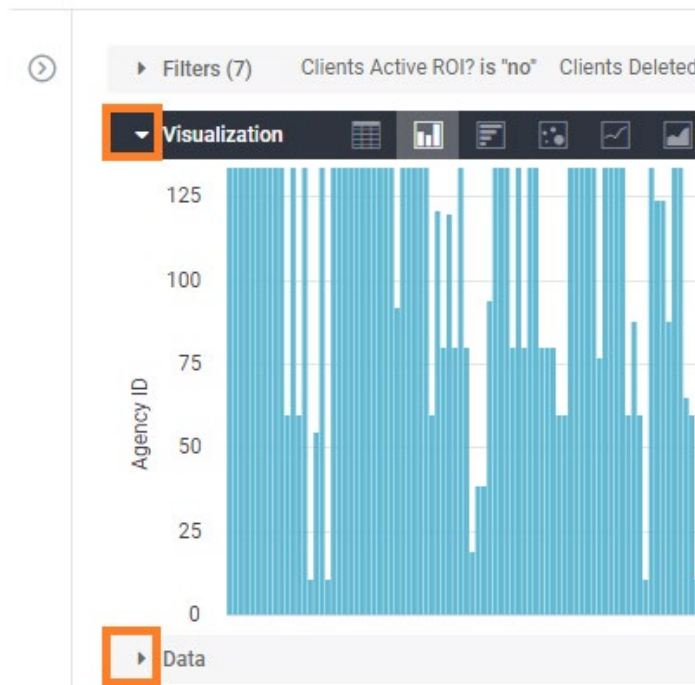
To download the data, simply click on the gear on the top right corner of the screen and choose download.

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The Download dialogue box has several options that need close attention. Most importantly, we are looking at the file format and the limit. As you can see, we recommend downloading an excel document, though there are a collection of other options. The custom reports also have a limit within the system. The default row limit is 500 lines, but many reports will have more data. Always click "All Results" as the Limit option to make sure you receive all of the data from the report. You do not need to change the file name here in this box, as it will give you another opportunity as soon as you click "Download".

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ROI ERROR Report Categories Explained

Aged Into Adulthood

The Aged into Adulthood Report will provide you with a list of your clients who are 18 years of age or older but only have a "Household" ROI. This means that either they were entered into the system incorrectly or they were entered into the system as a minor and have since aged into adulthood. As all adults in the system must have a valid signed ROI, you will need to get this client to sign an ROI as soon as possible.

Once you have the new ROI, you go into the client's profile, click on the privacy shield, and add the new ROI (either an Electronic Signature or an Attached PDF). This will resolve the error.

Minor Documentation Error

The Minor Documentation Error Report will provide you with a list of minor clients who have ROIs that are in any category **but** Household ROI. To resolve this, please go into the client's profile, click on the privacy shield, and review the ROI that is there. Either change the ROI that is there or add a Household ROI that matches the parent or guardian's ROI. For more detailed information on ROIs for Minors, please see our How to Add ROIs for a Household Job Aid. This will resolve the error.

Missing

The Missing Error Report will provide you with a list of all clients who are missing ROIs. They either never had an ROI or their ROI has ended. Please get a valid ROI for this client as soon as possible to resolve this error.

Signed Paper Document

The Signed Paper Document Error Report will provide you with a list of all clients who have Signed Paper Document ROIs. This category of ROI has been retired but was previously used to affirm that there is a signed ROI in the client's physical file. If this ROI was input by your agency, please find the document, scan it, and change the ROI to an Attached PDF ROI and upload the document. Please make sure to set the start date for the date the client initially signed the

document. The end date should not be any farther out than seven years.

If the original Signed Paper Document ROI was not input by your agency, treat this as a missing ROI and get a valid ROI for this client as soon as possible to resolve the error.

Verbal Consent

The Verbal Consent ROI category was implemented in HMIS in March of 2020 as a temporary solution until direct service staff were able to meet with their clients in person. The email that was sent out from the HMIS department at that time stated that all Verbal Consent ROIs should be replaced with signed documents as soon as possible. Any clients who have Verbal Consent ROIs should be treated as if they are Missing ROIs; please get a valid ROI for this client as soon as possible to resolve this error.