Quarterly HMIS Data Quality Review

[Jump to Submission Form Instructions](#)

Submitting quarterly data quality reports for HMIS projects strengthens program integrity and builds confidence in the information being entered every day. Regular reviews help staff catch patterns of missing or inconsistent data early, reinforce good data entry habits, and create opportunities for ongoing training and support.

Quarterly reporting also encourages consistency across teams and projects, ensuring everyone is following the same standards and expectations. By reviewing data on a routine basis, projects can maintain organized records, reduce last-minute corrections, and foster a culture of accountability and continuous improvement.

This document guides you through running the required reports and submitting your results. It helps you stay on track and complete each quarterly review accurately and on time. ***Please refer to the email reminder for the current submission form link, as it changes quarterly.***

Quarterly Data Quality Submission Checklist

Reports to Generate & Upload

☐ Final HUD EVA System-Level Data Quality Download
☐ Timeliness Report (PDF)
☐ Inventory & Utilization Report (XLSX) - *Residential Projects Only*

Required Reviews & Confirmations

☐ Client Duplication Report
☐ Annual Assessment Tool
☐ Housing Move-In Date Report - *Permanent Housing Projects Only*
☐ HMIS User Report
☐ Active Projects

Quarterly Data Quality Quick Steps

HUD Eva Report

1. Export **HUD CSV Export 2026** from ClientTrack
2. Upload HUD CSV Export 2026 from ClientTrack to Eva
3. From Eva, download Organization-Level file
4. Data clean up
5. Repeat steps 1 - 4
6. Upload report to quarterly submission form

HMIS Timeliness Data Entry Report

1. Select **HMIS Data Entry Timing Report**

2. Input the date range, type of enrollment, organization, and project(s)
3. Select Report on the bottom right of the screen
4. Download the report to PDF via the Save Icon

Inventory & Utilization Report

1. Select the appropriate **Utilization report**
2. Delete the Max Rows and input the date range
3. Select Export at the bottom of the pop-up window
4. Export as XLSX

Client Duplication Report

1. Select **Client Duplication Report**
2. Select at least one 'Exact' and choose the rest to be 'Like' and click 'Run'
3. Repeat these steps with different combinations of 'Exact' and 'Like'
4. Review proper client creation procedures with any users who are creating multiple duplicates
5. Submit a Spiceworks ticket with any duplicates that are found

Annual Assessment Tool

1. Select **Annual Assessment Tool**
2. Leave 'Date' set to today's date
3. Select the checkbox for Overdue Annual Assessment
4. Select your Organization and/or Project(s) to view all annual assessments due
5. Click Search
6. Export the results to Excel
7. Complete all Annual Assessments for client(s) listed

Housing Move-in Date Report

1. Select **Open Housing Enrollments - My Org**
2. Delete 'Max Rows'
3. Select Export at the bottom of the pop-up window
4. Export as XLSX
5. Review list and update Move-In Dates as necessary

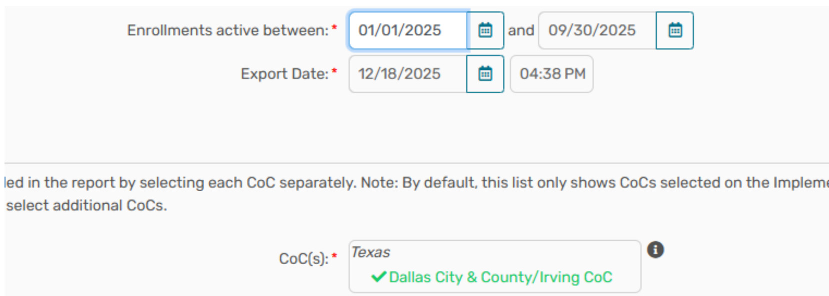
HMIS End User Report

1. Switch **Workgroup to 'DQO'**
2. Select 'Users' on the left-hand menu
3. Select the appropriate Status (Active/Inactive)
4. Select Search
5. Export as XLSX
6. Submit a Spiceworks ticket with any users whose access needs to be removed

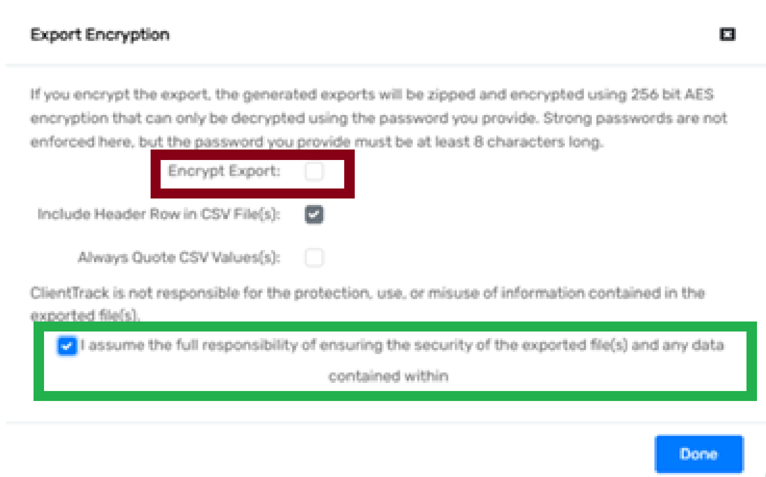
Detailed Instructions for Quarterly Data Quality Reports

HUD Eva Report

1. In ClientTrack's **Reporting workspace**, select **HMIS Exports** then **CSV Export 2026**
2. Input the date range, CoC, organization and other filters listed below
    a. **Source End Point:** Eva
    b. **Source Type:** Continuum-Operated HMIS
    c. **Date Range:**
        i. Begin Date: 01/01/202_
        ii. End Date: the end of the previous quarter
    d. **CoCs:** Dallas City & County/Irving CoC



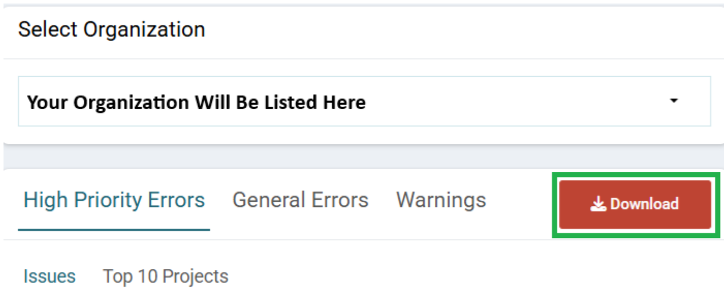
    e. **Organization and Project(s):** Select your organization and all applicable projects
        i. **Including** any projects that are **'Inactive'**
        ii. **Excluding** any projects that are **'Other'**
    f. **Hash PII:** Check this box
        i. This is crucial for the upload to Eva to work
    g. Click **'Run Export'** and you'll receive a pop-up
        i. **Uncheck** 'Encrypt Export' and **check** 'I assume the full responsibility…'



    h. **Click 'Done'** to run the export
    i. **Download the export**, when it is finished, from the **'Files on Server'** page
3. Upload HUD CSV from ClientTrack to Eva
    a. Go to: https://hmis.abtsites.com/eva/
    b. Click '**Click here to get started**'

c. Select ‘**Browse…**’ and upload the downloaded CSV Export
    i. If you receive any error which keeps you from uploading, please click ‘**Download**’ and attach the downloaded file to a Spiceworks ticket.

4. Download Organization-Level file from Eva
    a. Once the upload and processing are complete, click ‘**Data Quality**’ and then ‘**Organization-level**’
        i. From here review the stats Eva provides.
    b. Click ‘**Download’** to get an Excel file of all the errors and warnings.



        i. Data cleanup will be completed using the download.
5. Data cleanup
    a. Guidelines when cleaning up your errors and warnings:

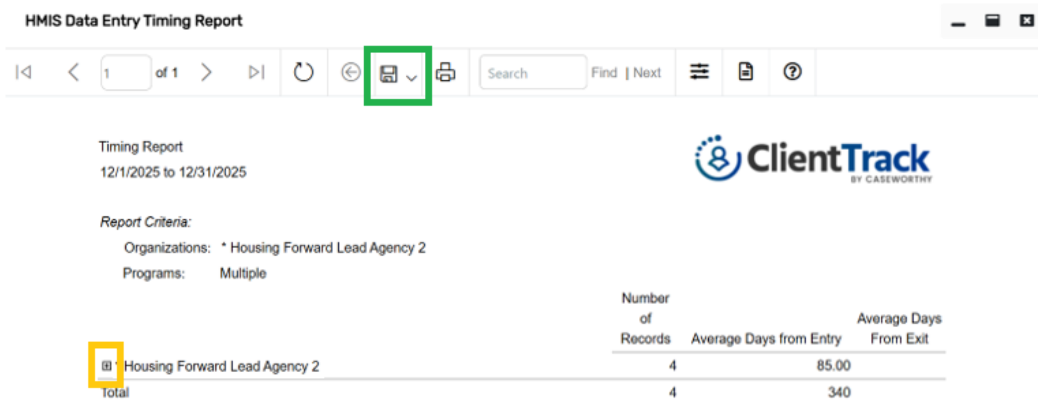
Eva Classifies Issues 3 Ways				
	What it means	**Action Needed**	**Examples**	**Goal**
High Priority Errors	Not permitted by the data standards AND have a **high** impact on federal reporting	Correct this issues with urgency	Duplicate Entries or No Head of Household	**Aim for zero**
General Errors	Not permitted by the data standards and have an impact on federal reports	Correct this issues with urgency	Missing Verteran Status	
Warnings	May be a data quality issue, but may also be an unexpected situation that reflects reality	Check for accuracy	Overlapping Enrollments or Unknown SSN	**DO NOT aim for zero**

    b. On the Submission Form, you will need to confirm all errors have been rectified and all warnings have been reviewed.
        i. If corrections were not made provide a reason as to why.
6. Repeat steps until you are ready to submit.
7. Upload report to quarterly [Submission Form]

Timeliness Report

1. In ClientTrack’s **Reporting workspace**, select **HMIS Reports** then **HMIS Data Entry Timing Report**
2. Input the date range, type of enrollment, organization, and project(s).
    a. **Date Range:**
        i. Begin Date: 01/01/202_
        ii. End Date: the end of the previous quarter
    b. **Type:** Begin Enrollment
    c. **Organization:** Your organization

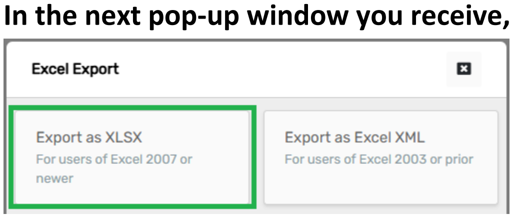
   d. **Filter by Project:** Check the box
      i. **Select all projects except** ‘Other’
3. Select **Report** on the bottom right of the screen
   a. This will open a pop-up window with the report



   b. Click the + button next to your Organization’s Name (yellow box above).
      i. This will expand the report to show the Project’s Name and the overall timeliness for that project.
      ii. If you have a higher average for a project than expected, click the + button next to a Project Name.
         1. Review each client (enrolled during reporting period) and their individual timeliness.
   c. **Before Step 4, you must click the – button to hide the client list before moving on. You must protect client level data.**
4. Download the report to PDF via the Save Icon
   a. **Please verify there is no client level data**
   b. Select the **Floppy Disk** icon (green box above) and click ‘PDF’
5. Upload report to quarterly [Submission Form]

Inventory and Utilization Report

1. In ClientTrack’s **Reporting workspace**, open the ‘**Other**’ folder
2. Select the appropriate **Utilization Report** (e.g., Utilization (E/E, SH, TH) or (Utilization (Housing Projects).
3. **Delete the Max Rows and enter the date range, making sure to include the /**
4. **Select Export** at the bottom of the pop-up window
5. **In the next pop-up window you receive, select Export as XLSX**



6. Upload report to quarterly [Submission Form]

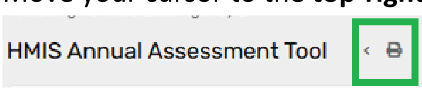
Client Duplication Report

1. In ClientTrack's **Reporting workspace**, open the '**Other**' folder, select **Client Duplication report.**
2. Select '**Exact**' for one identifier and '**Like**' for the other two, then click '**Run**'

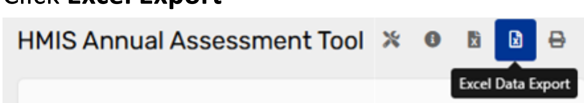
3. **Repeat** these steps with different combinations of '**Exact**' and '**Like**'
4. Submit a **Spiceworks ticket** with any duplicates that are found
5. Review proper client creation procedures with any users who are creating multiple duplicates

Annual Assessment Tool

1. In the **Home workspace**, open the **'My ClientTrack'** folder**,** select **Annual Assessment Tool.**
2. **Annual Assessment Date:** set to Today's Date.
3. **Overdue Annual Assessments:** check box
4. **Organization or Project:** at least **one filter must be applied** to search.
    a. Please pay close attention to the **Anniversary Date** in the search results.
        i. The tool identifies clients who have a current year annual assessment but are missing an annual assessment from a previous year.
5. Click '**Search'**
6. Move your cursor to the **top-right corner to view additional menu options**



7. Click **Excel Export**



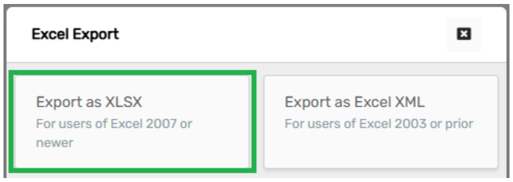
    a. An extended menu will appear, select Excel Export.
    b. You'll receive a download with a list of Annual Assessments that need to be completed.
8. Review the exported list to see which clients have an Annual Assessment due.
9. Complete the Annual Assessments for the clients listed to bring all records up to date.

Housing Move-In Date Report

For PSH/PH/RRH Only

1. In ClientTrack's **Reporting workspace**, open the '**Other**' folder
2. Select **Open Housing Enrollments - My Org**
3. Delete the **Max Rows**
4. **Select Export** at the bottom of the pop-up window

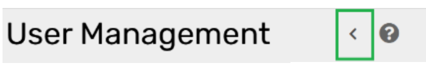
5. **In the next pop-up window you receive, select Export as XLSX**



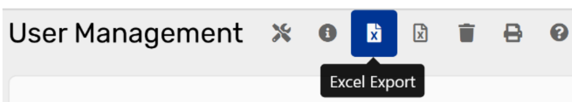
6. Review the list to ensure all Housing Move-In Dates have been recorded for the head of household

User Report

1. **Switch Workgroup to 'DQO'**
    a. Click your initials in the top-right corner.
    b. Select Workgroup, then choose DQO.
    c. Click Apply.
        i. The page will reload with updated options.
2. Select **'Users'** from the left-hand menu to view current users in your organization.
3. Keep Status set to **'Active.'**
    a. If you change the Status, click Search.
4. Move your cursor to the **top-right corner to view additional menu options** (as shown in the screenshot).



5. Click **Excel Export**



    a. An extended menu will appear, select Excel Export.
    b. You'll receive a download with a list of all Active users.
6. **Evaluate this list to ensure that everyone listed is a current employee.**
    a. If anyone on the list needs to be made Inactive, please send a Spiceworks ticket with all names that need to be Inactive.

Step-by-Step: Quarterly Submission Form

1. Select your Organization
    a. If it is not listed, select 'Not Listed'.
    b. Type your organization's name in the box provided.
2. [Final System-Level Data Quality Download from Eva]
    a. Upload the download received from Eva after you've uploaded the final CSV Export.
        i. If you do not receive a download, take a screenshot and upload it in place of the CSV Export.
    b. You'll get the download from the System-Level option in Data Quality dropdown.
3. Have all High Priority Errors been resolved?
    a. These errors are **expected** to be resolvable.

    b. If ‘No’, explain why the errors cannot be resolved.
4. Have all General Errors been resolved?
    a. These errors are **expected** to be resolvable.
    b. If ‘No’, explain why the errors cannot be resolved.
5. Have all Warnings been resolved?
    a. These errors **may not** be resolvable.
    b. If ‘No’, explain why the errors cannot be resolved.
6. Timeliness Report
    a. ***There should be NO client level information.***
    b. Upload the PDF version of the Timeliness Report.
    c. Verify all projects are visible in this report.
    d. Do all project(s) meet the CoC timeliness benchmarks?
        i. Review and indicate whether your project(s) meets the benchmarks.
        ii. If ‘No,’ please explain why.
            1. E.g. We were understaffed, so data entry was delayed.
7. Utilization Report
    a. Upload the report you generated in ClientTrack.
    b. Do all residential projects meet the CoC’s utilization benchmarks?
        i. If ‘No’, please explain why rates fall below benchmarks.
        ii. Select ‘N/A’ if this does not apply to any of your projects.
8. Please confirm a Client Duplication Report was run and that any duplicate client records have been reported via a help desk ticket.
9. Please confirm the Annual Assessment Tool was used to verify all required Annual Assessments are complete.
    a. For any assessments that were not completed, provide an explanation.
10. Please confirm all Housing Move-In Dates are recorded for every client who has moved into permanent housing.
    a. **Housing Move-In Dates are required for all clients who have moved into permanent housing.**
    b. Select ‘N/A’ if this does not apply to any of your projects.
11. Please confirm a User Report was run and that all active users still need HMIS access to perform their responsibilities.
    a. Submit a Spiceworks ticket for any active users who should be made inactive.
    b. Respond based on the results of the report you ran.
12. Please review all active projects and confirm whether any are no longer serving clients and should be disabled.
    a. If a project is no longer serving clients, submit a Spiceworks ticket.
        i. Ensure all clients are exited before submitting ticket.
13. Email of Data Quality Officer
14. Data Quality Officer Signature
    a. Simply sign it as best you can with your mouse or finger (depending on your device)