Bitfocus

# King County HMIS News

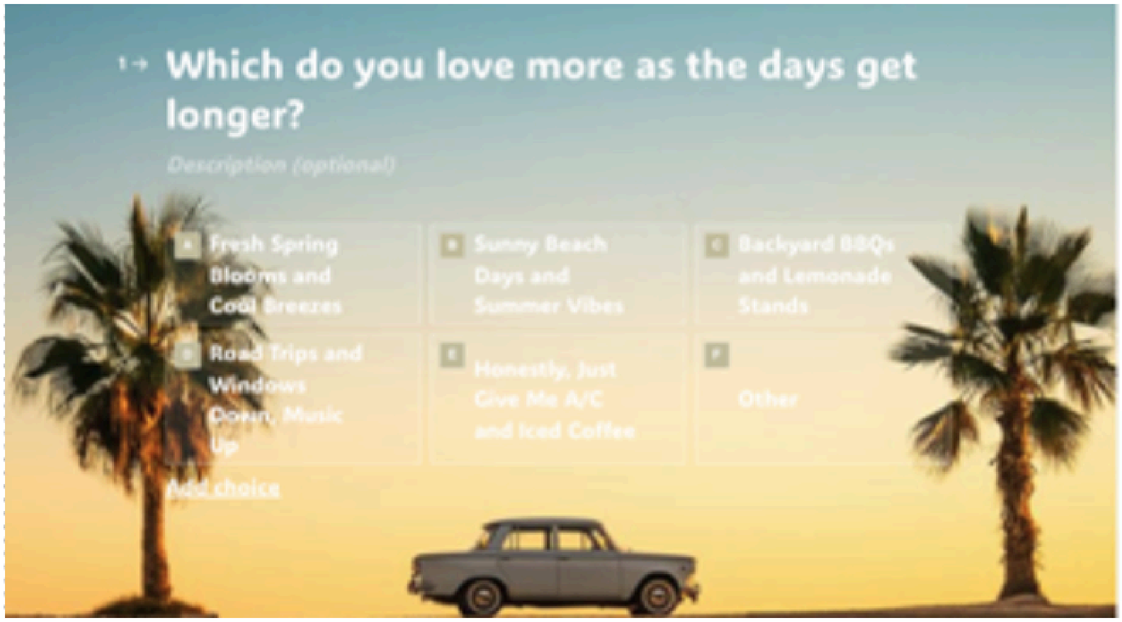
# May 2025

## Welcome!

In this edition, you'll find the following:

- Community Poll
- Upcoming Events
- Federal Reporting Updates
- Clarity Toolbox: Duplicate Clients and Duplicate Enrollments
- Report Spotlight: [GNRL - 409] Annual Assessment Overview - *NEW*

## Community Poll




**Complete the poll!**

**Results from last month's poll:** Thanks for taking the time to respond!

If you could teleport anywhere for Spring Break...

- 65% chose *Lisbon, Portugal*
- 18% chose *Honolulu, Hawaii*
- 6% chose *San Diego, California*
- 6% chose *Whistler, Canada*
- 5% chose *Other*
- 0% chose *Home - but with room service*

## Upcoming Events

### Coordinated Entry Monthly Assessor Credential Training (ACT)

*Users must attend an ACT training before they gain assessor access in the HMIS.*

June 11th | 9:30 am - 11:30 am **Register Here**

Register Here

**2025 HMIS Training Series: Inventory (Overview)**

*Join us as we review the Inventory Module in King County's HMIS, including referring clients to available units, enrolling clients who've been referred, and Inventory FAQs.*

June 18th | 10 am - 11:30 am **Register Here**

Register Here

## Federal Reporting

### Point-in-Time Count and Housing Inventory Count Updates

**The submission deadline for the 2025 PIT and HIC reports to HUD is June 13th, 2025** at **5pm** PT. Thank you so much for your responses to all our emails throughout the federal reporting season. We are so close - the finish line is in sight! Hang in there with us! If you have any questions related to federal reporting, please do not hesitate to reach out to **kcsupport@bitfocus.com**

**Curious about past reports?**

**CoC Housing Inventory County Reports**

**CoC PIT and HIC Data Since 2007**

**PIT Trendinator by Matt Schnars**

**High/Low Utilization Review**

Thank you to all the Agency Leads who have already shared updates regarding high and low utilization for the HIC/PIT! We'll continue to reach out if additional information is needed.

# Clarity Toolbox

## Duplicate Clients and Duplicate Enrollments

As part of continued efforts to increase data quality, we wanted to highlight how to address the most common, and avoidable mistakes we encounter when reviewing system-wide data quality.

**How to Find Duplicate Clients**

You can use the **[DQXX-110] Duplicate Clients** report to help you identify when your clients have duplicate profiles within the agencies that you have access to. See the report spotlight below to find out more about this report!

How to Correct Duplicate Clients

If you find duplicate clients and need to have them merged please reach out to Helpdesk at **kcsupport@bitfocus.com** to request the merge. Be sure to let us know the following:

- The unique IDs of the two (or more) clients who need to be merged (never send identifying information via email!)
- Which client is the "primary" client. Although all enrollment, service, coordinated entry and other information about duplicate clients will be merged together, we can only keep one client profile. The primary client is the one whose profile we want to keep (usually this means it has more complete information than the other profile.)

**How to Find Duplicate Enrollments**

Duplicate enrollments can happen for a variety of reasons:

- When duplicated clients are merged together, enrollments for both clients are assigned to the remaining client, which can result in duplicate enrollments.
- Returning clients are enrolled with incorrect start dates, making it look like two separate enrollments are duplicate enrollments.
- Start or end dates on an enrollment get edited to overlap each other.
- Rather than removing an exit date to re-open an enrollment, users sometimes create a new enrollment with the same or similar start date.
- Multiple staff entering enrollments for clients without checking the client's history to see whether they've already been enrolled.

### How to Correct Duplicate Enrollments

Once you're ready to fix your duplicate enrollments, you should do the following:

- Decide which enrollment you want to keep. You can always change enrollment dates and update information, so if you're comparing enrollments and one has annual assessments, family members, and clients notes, while the other has only enrollment screen information, you should keep the more detailed one (Need to compare enrollment data? Use the **[GNRL-220] Program Details** report.)
- Update the target enrollment (the one you want to keep) with any missing information from the duplicate enrollment (again, the **[GNRL-220] Program Details** report can help).
- If you need to move services from the duplicate enrollment to the target enrollment, we recommend asking the Help Desk to do this for you. Just be very clear with which services you want to move from the duplicate enrollment to the target enrollment.
- Once you've updated any details and have information on any services that may need to be moved to the target enrollment, contact the Help Desk with your request to delete the duplicate enrollment (and move any services, if applicable).

Contact the Helpdesk at **kcsupport@bitfocus.com** and they can work with you to get your enrollments cleaned up.

## Report Spotlight

## [GNRL - 409] Annual Assessment Overview

### Report Purpose & Summary

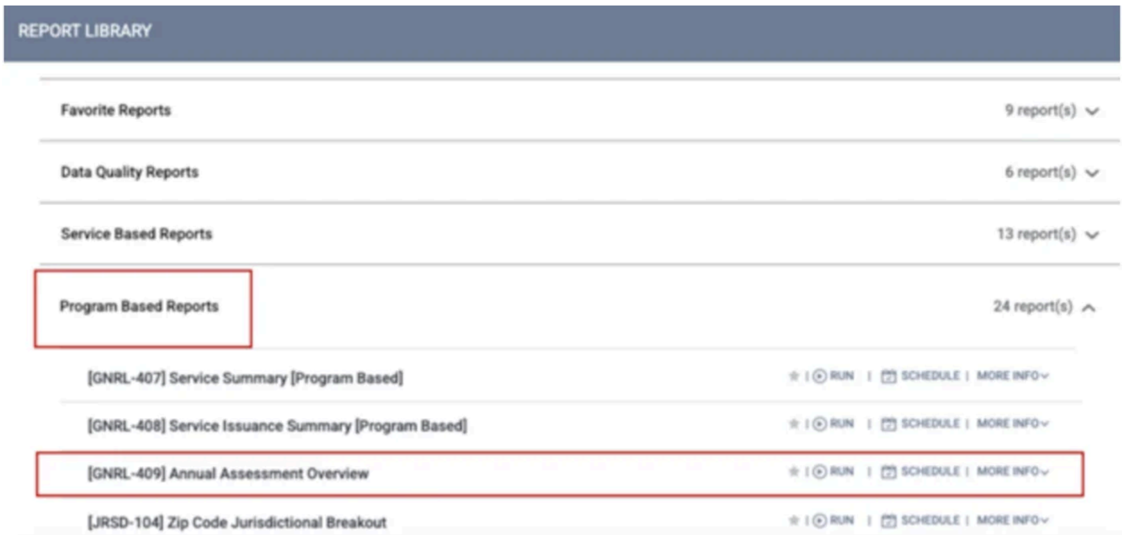
This program enrollment-based report provides a detailed view of the Annual Assessment Statuses. It tracks client progress regarding their annual assessments, providing insights into the timely completion of assessments, overdue assessments, and data-related issues to assist with data quality, compliance, and monitoring.

## Who Can Run the Report

Anyone can run the report; however, the returned information will be limited based on the access rights of the user.

## Report Location

This report is found in the Program Based section of the Report Library as **[GNRL-409] Annual Assessment Overview**




## Parameters

The following parameters are required for the Annual Assessment Overview report:

**To Select multiple options sequentially, hold down the Control/Command and Shift on your keyboard*

| | |
|---|---|
| Project Type(s) | Select which Project Type(s) to include:<br><br>All, Single Select, or Multi-Select* |
| Program Status | All Programs, Active Programs or Inactive Programs<br>Program Status: Choose... / All Programs / Active Programs / Inactive Programs |
| Program(s) | Select which Program(s) to include:<br><br>All, Single Select, or Multi-Select* |
| Annual Assessment Status(es) | Select which Annual Assessment Status(es) to include:<br><br>All, Single Select, or Multi-Select.<br>Annual Assessment Status(es): Choose... / All / Completed / Completed Out of Range / Past Due / Due / Assessment Window Opening in 30 Days / Not Due / Enrolled Less than 1 Year / Data Issue / Exited Before HoH's 1st Anniversary |
| Report Start Date | Choose the Report Start Date.<br><br>**Note:** The Report End Date automatically fills with the current date |
| Report Output Format | The Web Page output is great for clicking directly into client's profiles in Clarity<br>Report Output Format: Web Page / PDF / Excel |

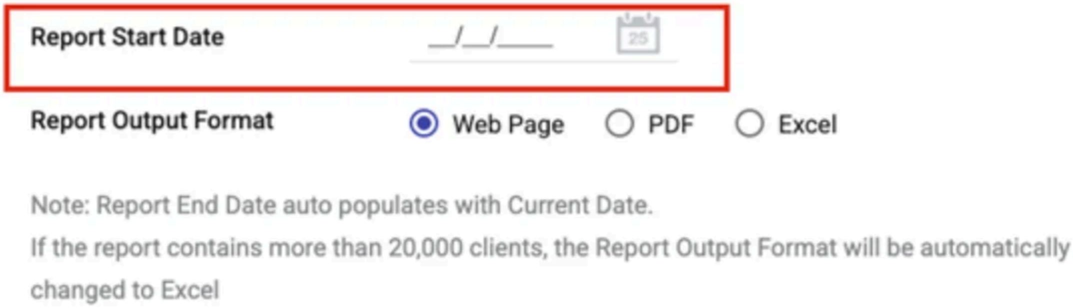
*Administrator version please refer to the article for additional report parameters for your access role **here**.

## Report Universe

The report applies to ***Active Client*** and includes all project stays that were active on or between the Report Start Date and Report End Date.

**Active clients:** are identified based on their project start date, project exit date, and the report's date range.

**Note** You will only see one field to enter the start date as shown in image below because the report end date will default to the current date you're running the report.



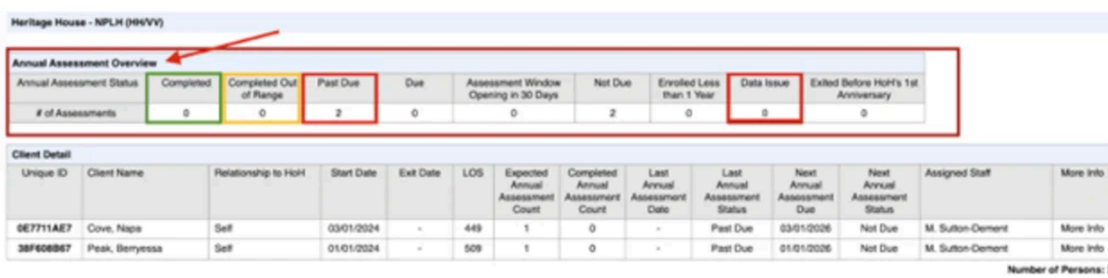

## Specifications

The report includes the following tables for each program:

- **Annual Assessment Overview**
- **Client Detail**

## Annual Assessment Overview

The Annual Assessment Overview table, displays the count of Annual Assessment Statuses.



Heritage House - NPLH (HH/VV)

**Annual Assessment Overview**

| Annual Assessment Status | Completed | Completed Out of Range | Past Due | Due | Assessment Window Opening in 30 Days | Not Due | Enrolled Less than 1 Year | Data Issue | Exited Before HoH's 1st Anniversary |
|---|---|---|---|---|---|---|---|---|---|
| # of Assessments | 0 | 0 | 2 | 0 | 0 | 2 | 0 | 0 | 0 |

**Client Detail**

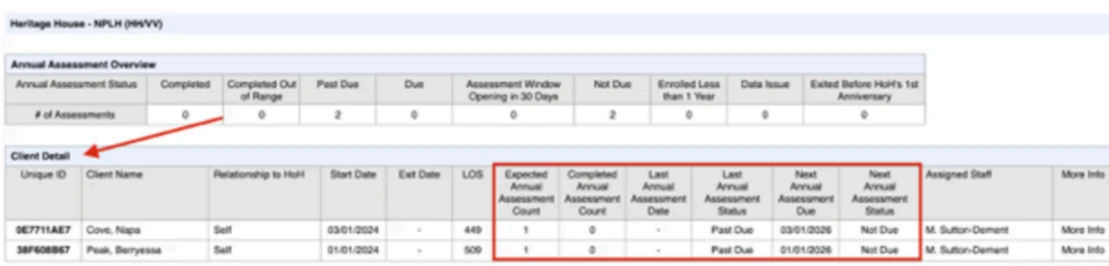
| Unique ID | Client Name | Relationship to HoH | Start Date | Exit Date | LOS | Expected Annual Assessment Count | Completed Annual Assessment Count | Last Annual Assessment Date | Last Annual Assessment Status | Next Annual Assessment Due | Next Annual Assessment Status | Assigned Staff | More Info |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0E7711AE7 | Cove, Napa | Self | 03/01/2024 | - | 449 | 1 | 0 | - | Past Due | 03/01/2026 | Not Due | M. Sutton-Dement | More Info |
| 38F608B67 | Peak, Berryessa | Self | 01/01/2024 | - | 509 | 1 | 0 | - | Past Due | 01/01/2026 | Not Due | M. Sutton-Dement | More Info |

Number of Persons: 2

| | |
|---|---|
| Completed | Completed within the expected timeline (+/- 30 days from anniversary date) |
| Completed Out of Range | Completed outside of the expected timeline (+ 31 days from the anniversary date) |
| Past Due | No relevant completed assessment compared to the anniversary date. |
| Due | Assessment Due Date is within +/- 30 Days from the anniversary date. |
| Assessment Window Opening in 30 Days | Assessment Due Date is 31-60 Days Away from the anniversary date. |
| Not Due | Assessment Due Date is 61+ Days Away from the anniversary date. |
| Enrolled Less than 1 Year | Client was exited prior to 365 Days from the anniversary date. |
| Data Issue | Annual Assessment Dates cannot be inferred due to no HoH or other data issues. |
| Exited before HoH's 1st anniversary | Client exited in Report Date Range before HoH's 1st anniversary date. |

## Client Detail

The Client Detail table provides a client-specific summary of their program enrollment, including the number of **expected** and **completed annual assessments**, the status of their **last completed assessment**, and the due date for their **next assessment**.



Heritage House - NPLH (HH/VV)

Annual Assessment Overview

| Annual Assessment Status | Completed | Completed Out of Range | Past Due | Due | Assessment Window Opening in 30 Days | Not Due | Enrolled Less than 1 Year | Data Issue | Exited Before HoH's 1st Anniversary |
|---|---|---|---|---|---|---|---|---|---|
| # of Assessments | 0 | 0 | 2 | 0 | 0 | 2 | 0 | 0 | 0 |

Client Detail

| Unique ID | Client Name | Relationship to HoH | Start Date | Exit Date | LOS | Expected Annual Assessment Count | Completed Annual Assessment Count | Last Annual Assessment Date | Last Annual Assessment Status | Next Annual Assessment Due | Next Annual Assessment Status | Assigned Staff | More Info |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0E7711AE7 | Cove, Napa | Self | 03/01/2024 | - | 449 | 1 | 0 | - | Past Due | 03/01/2026 | Not Due | M. Sutton-Dement | More Info |
| 38F608B67 | Peak, Berryessa | Self | 01/01/2024 | - | 509 | 1 | 0 | - | Past Due | 01/01/2026 | Not Due | M. Sutton-Dement | More Info |

Number of Persons: 2

The columns in this report table and related calculations are described below.

> **Length of Stay (LOS):** Calculated as the number of days between the program start date and the exit date. If the exit date is null, LOS is measured from the program start date through today + 1 day.

**Expected Annual Assessment Count:** The total number of anniversary due dates for a project stay where either

- the Anniversary Due Date falls on or before today,
- or the Anniversary Date Status is marked as “Completed”.

**Completed Annual Assessment Count:** The number of anniversary due dates for a project stay where the Anniversary Date Status is either “Completed” or “Completed Out of Range”

**Last Annual Assessment Completed:** Refers to the Annual Assessment Date associated with the most recent anniversary due date where the Anniversary Date Status is either “Completed” or “Completed Out of Range” (Displays “–” if no qualifying assessment is available).

**Current Annual Assessment Status:** Displays a Project Stay’s "Current Annual Assessment Status" as outlined in the **Annual Assessment Overview** table.

**Next Annual Assessment Due:** The nearest upcoming Anniversary Due Date that falls after today (Displays “–” if no date can be calculated—such as for exited project stays, or when the Current Annual Assessment Status is “Data Issue” or “Exited before HoH’s 1st anniversary”).

## Drilldown Functionality

The Web Page Report Output Format was built with drill down functionality, the Annual Assessment Overview Table allows users to drill down by selecting the number of assessments as shown in the red box below. (All of those are clickable).

**Annual Assessment Overview**

| Annual Assessment Status | Completed | Completed Out of Range | Past Due | Due | Assessment Window Opening in 30 Days | Not Due | Enrolled Less than 1 Year | Data Issue | Exited Before HoH's 1st Anniversary |
|---|---|---|---|---|---|---|---|---|---|
| # of Assessments | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 |

When you click on the # of Assessments drill down (any # in red box above) you will get this **List of Clients Table** Below which includes the following information:

- Unique ID, Name, Relationship to HoH, Start Date, Exit Date, LOS, Number of Assessments, Assigned Staff

**Annual Assessment Overview**

**Past Due**

**List of Clients**

| Unique ID | Name | Relationship to HoH | Start Date | Exit Date | LOS | Number of Assessments | Assigned Staff |
|---|---|---|---|---|---|---|---|
| 0E7711AE7 | Cove, Napa | Self | 11/05/2023 | - | 566 | 1 | M. Sutton-Dement |

**Number of Persons: 1**

**Number of Households: 1**

The **Client Detail** table offers a drill-down feature where you can click into the **Unique Identifier** and the **More Info** Column as shown in red below.

- The **Unique Identifier** directs users to the client profile screen in Clarity Human Services.

**Client Detail**

| Unique ID | Client Name | Relationship to HoH | Start Date | Exit Date | LOS | Expected Annual Assessment Count | Completed Annual Assessment Count | Last Annual Assessment Date | Last Annual Assessment Status | Next Annual Assessment Due | Next Annual Assessment Status | Assigned Staff | More Info |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0E7711AE7 | Cove, Napa | Self | 03/01/2024 | - | 449 | 1 | 0 | - | Past Due | 03/01/2026 | Not Due | M. Sutton-Dement | More Info |
| 38F608B67 | Peak, Berryessa | Self | 01/01/2024 | - | 509 | 1 | 0 | - | Past Due | 01/01/2026 | Not Due | M. Sutton-Dement | More Info |

**Number of Persons: 2**

- **The More Info**: Drill Down which includes the following information: Annual Assessment Due, Status, Completed Date.

**Annual Assessment Overview**

**Program Enrollment -> Assessments Page**

**List of Annual Assessments**

| Annual Assessment Due Date | Status | Completed Date |
|---|---|---|
| 03/01/2023 | Completed Out of Range | 06/01/2023 |

**Count of Expected Assessments: 1**

**Count of Completed Assessments: 1**

**For Troubleshooting Guidance & Details on the following below, please refer to rest of the article here.**

1. Anniversary Date Considerations
2. Exited Programs
3. Valid Assessment Windows
4. Changing the Head of Household (HoH)

5. Deleted Assessments
6. Example: Completed Before Anniversary
7. Example: Different Assessment Counts Between HoH and Household Member Scenario

**Head of Household (HoH)**

Completed annual assessments for:

- 04/01/2023
- 04/01/2024
- 03/04/2025 (within ±30 days of the 2025 anniversary)
- **Result:** All three anniversaries (2023, 2024, 2025) are counted as **Expected** and **Completed.**

**Household Member:**

When the report is run on 3/6/2025, annual assessment counts may differ between the Head of Household (HoH) and household members, even with the same program start date (04/01/2022). This is due to differences in assessment completion

- No assessments for 2023 or 2024
- 2025 anniversary is within 30 days (i.e., due), but no assessment exists
- **Result:** Only the 2025 anniversary is counted as **Expected,** and it is marked as **Past Due**

**Note:** Even though clients share the same start date, the assessment counts may differ for each household member, as only those completed within ±30 days of each anniversary date are counted in the totals.

**Exclusions and Caveats**

- Household members with a Project Start Date occurring after the relevant anniversary date are not yet required to complete an annual assessment.
- Annual Assessments with an Information Date that falls after the report end date will be excluded from the dataset.

## Questions? Your HMIS Administrator is happy to help.

**Phone: 206.429.7979 x2**

**Email: kcsupport@bitfocus.com**

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