



System Wide Performance Measures Report Guide

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CaseWorthy, Inc.

740 E. 3900 South

Suite 301

Salt Lake City, Utah

84107

Tel: 877-347-0877 Fax: 801-207-8350

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System Wide Performance Measures Overview

A critical aspect of the McKinney-Vento Homeless Assistance Act, as amended, is a focus on viewing the local homeless response as a coordinated system of homeless assistance options as opposed to homeless assistance programs and funding sources that operate independently in a community. To facilitate this perspective, the Act requires communities to measure their performance as a coordinated system, in addition to analyzing performance by specific projects or project types.

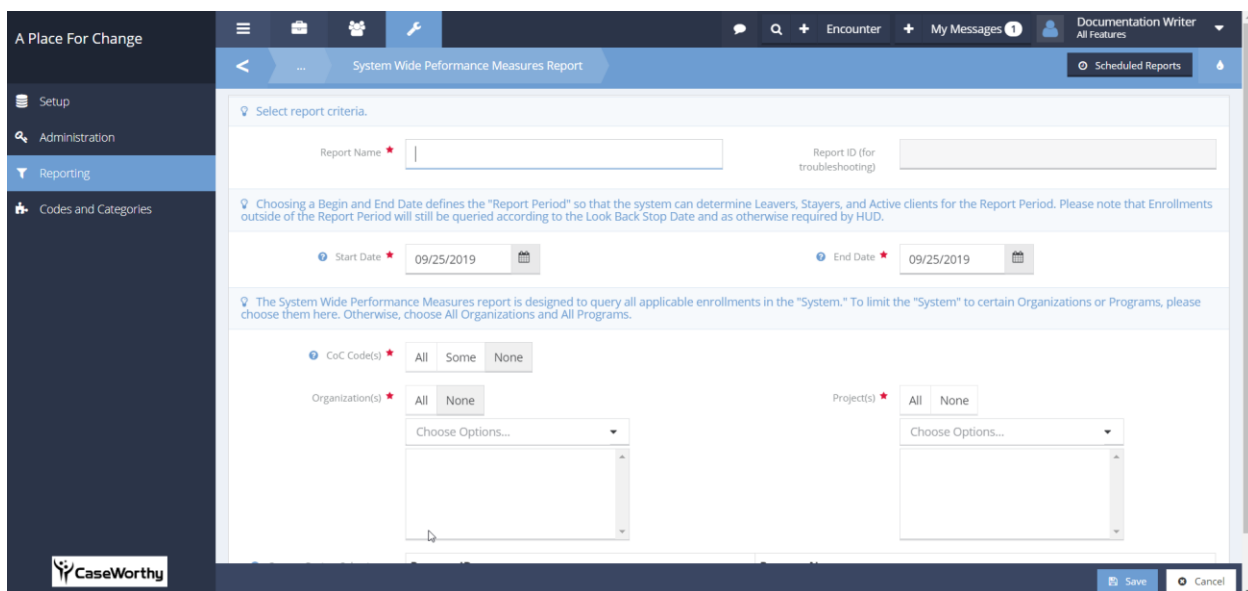
This guide simply covers how to launch the System Wide Performance Measures report and generate the CSV file. For more information about the report, please reference the HUD Exchange website [here](#).

Launch the System Wide Performance Measures Report

To access the report launcher, navigate to the Compliance Reports dashboard and select the System Wide Performance Measures menu link.

Navigation

Admin Tab: Reporting – Compliance Reports > System Wide Performance Measures – ADD NEW



The screenshot shows the 'System Wide Performance Measures Report' launcher interface. The top navigation bar includes 'A Place For Change', a menu icon, and user information for 'Documentation Writer'. The left sidebar lists 'Setup', 'Administration', 'Reporting', and 'Codes and Categories'. The main content area is titled 'System Wide Performance Measures Report' and contains the following fields and options:

- Select report criteria.**
- Report Name ***: A text input field.
- Report ID (for troubleshooting)**: A text input field.
- Start Date ***: A date picker set to 09/25/2019.
- End Date ***: A date picker set to 09/25/2019.
- CoC Code(s) ***: Radio buttons for 'All', 'Some', and 'None'.
- Organization(s) ***: Radio buttons for 'All' and 'None', with a 'Choose Options...' dropdown menu below.
- Projects ***: Radio buttons for 'All' and 'None', with a 'Choose Options...' dropdown menu below.
- A note: 'Choosing a Begin and End Date defines the "Report Period" so that the system can determine Leavers, Stayers, and Active clients for the Report Period. Please note that Enrollments outside of the Report Period will still be queried according to the Look Back Stop Date and as otherwise required by HUD.'
- A note: 'The System Wide Performance Measures report is designed to query all applicable enrollments in the "System." To limit the "System" to certain Organizations or Programs, please choose them here. Otherwise, choose All Organizations and All Programs.'
- Buttons for 'Save' and 'Cancel' at the bottom right.

The System Wide Performance Measures report is typically generated for the federal fiscal year of October 1st through September 30th, but the report can be run for any timeframe.

Note: It is possible to have multiple CoC codes in one database. It would then be necessary to run the report for each CoC separately.

Report Name – A description for reference to easily access the report later

Start Date – Enter the beginning date of the reporting period

End Date – Enter the ending date of the reporting period

CoC Code(s) – Select the CoC Code which should be included in the report

- **All** will include all CoC codes in your database
- **Some** will present a lookup to select the single or multiple CoC codes to include
- **None** will not include any CoC codes

Organization(s) – Select the Organizations which should be included in the report

- **All** will include all Organizations in your database
- **None** will not include any Organizations

Project(s) – Select the Program(s) which should be included on the report

- **All** will include all Programs in your database
- **None** will not include any Programs

Once the form is saved, the included Programs will display in the grid below, including the Program ID.

Once you have completed the required fields, as denoted with a red star next to the field, enter a report name, and then click SAVE.

System Performance Measures Summary

The HUD System Performance Measures Summary form shows a history of when this report has been generated. The action gear for each record offers additional functionality.

The screenshot displays the 'HUD System Performance Measures v3 Summary' report. The interface features a dark sidebar on the left with navigation options: Setup, Administration, Reporting (selected), and Codes and Categories. The top header shows the user 'Rukmani Krishna' and an 'Add New' button. The main table lists report generation history with the following data:

| | | Start Date | End Date | Perf. Meas. Refreshed |
|----|-----------------------|------------|-----------|-----------------------|
| | | 11/6/2016 | 3/3/2018 | 5/18/2016 7:45 AM |
| | | 2/1/2018 | 1/31/2018 | 3/1/2018 12:25 PM |
| | | 10/1/2018 | 9/30/2019 | 9/25/2019 3:48 PM |
| | | 10/1/2018 | 9/30/2019 | |
| | | 9/1/2018 | 9/30/2019 | |
| 25 | System Wide 2018-2019 | 10/1/2018 | 9/30/2019 | |

The context menu for the first row includes the following actions:

- Step 1. Set Up Report Options
- Step 2. Refresh HUD Warehouse
- Step 3. Generate Perf. Meas.
- Step 4. Read Performance Measures
- Step 5. Export CSV for HDX
- Delete Report
- Copy Setup Options to New Report

The bottom of the page shows the CaseWorthy logo and a 'Done' button.

Step 1: Set Up Report Options

Allows you to edit the previously selected reporting parameters, such as date range and programs. The Current Project Selection section is now populated for reference.

The report can also be scheduled to be generated and emailed in the future.

Select report criteria.

Report Name: Report ID (for troubleshooting):

Start Date: End Date:

The System Wide Performance Measures report is designed to query all applicable enrollments in the "System." To limit the "System" to certain Organizations or Programs, please choose them here. Otherwise, choose All Organizations and All Programs.

CoC Code(s): All Some None
Choose Options...
MD-501

Organization(s): All None
Choose Options...
A Place For Change

Project(s): All None
Choose Options...
Bereavement
BH Program
Budgets Program
Campaigns - Generic

Current Project Selection

| ProgramID | ProgramName |
|-----------|--|
| 451 | ! Carter Test PH Program |
| 455 | ! Emergency Shelter Program Entry/exit date Comp |
| 454 | ! Emergency Shelter Project/Program Night By Night |
| 346 | ! FinancialHMIS |
| 457 | ! Permanent Supportive Housing(Disability Req) |

Step 2: Refresh HUD Warehouse

Allows for viewing and refreshing the warehouse history. A refresh is only necessary if any data that the report used has changed. The refresh clears data from a table and repopulates it.

The screenshot shows the 'HUD Data Warehouse Refresh History' page. The left sidebar contains navigation options: Setup, Administration, Reporting (selected), and Codes and Categories. The main content area includes a 'Filters' section, a warning message about CaseWorthy version 5.2.1, and a table of refresh history. The table has four columns: Refresh History ID, Refresh Requested, Requested By, and Refresh Completed. The data shows seven refresh requests, all by 'cameron', with dates ranging from 12/8/2015 to 1/20/2016. At the bottom, there are buttons for 'Refresh Warehouse' and 'Done'.

| Refresh History ID | Refresh Requested | Requested By | Refresh Completed |
|--------------------|--------------------|--------------|--------------------|
| 1 | 12/8/2015 9:23 AM | cameron | 12/8/2015 9:23 AM |
| 2 | 1/11/2016 8:56 AM | cameron | 1/11/2016 8:56 AM |
| 3 | 1/11/2016 8:58 AM | cameron | 1/11/2016 8:58 AM |
| 4 | 1/11/2016 10:43 AM | cameron | 1/11/2016 10:43 AM |
| 5 | 1/20/2016 8:59 AM | cameron | 1/20/2016 8:59 AM |
| 6 | 1/20/2016 9:15 AM | cameron | 1/20/2016 9:15 AM |
| 7 | 1/20/2016 9:38 AM | cameron | 1/20/2016 9:38 AM |

Step 3: Generate Performance Measures.

Generate the performance measures by populating tables with results and metrics that the Report and Export utilize. This is the most time-consuming step, depending on data size. Once the report generates, a message is displayed with details of the status and the date and time the report was generated.

The screenshot shows the 'HUD Performance Measures v3 Generation Status' page. The left sidebar is the same as in Step 2. The main content area displays the status: 'Completed Generating Universes for all Metrics, Ready to Run Visual Report'. Below this, the 'Last Refreshed' date and time are shown as '09/25/2019 15:48:48 a'. At the bottom, there are buttons for 'Generate Perf. Meas. Universes', 'Refresh Page', and 'Done'.


Step 4: Read Performance Measures

Allows for the viewing of the data in a report format. This is an aggregate report with links to drilldown into the data for quality review.

1 of 6
100%
Find | Next

System Wide Performance Measures

Run by rukmani - A Place For Change on 9/27/2019 at 3:27 PM



Report Period : 10/1/2018 to 9/30/2019 Organization(s) : CaseWorthy,

Program(s) : _Adult Education,

Drilldown Hyperlinks to Metric Universes

[Metric 1a](#)

[Metric 2a and 2b](#)

[Metric 3.2](#)

[Metrics 4.1 - 4.6](#)

[Metric 5.1](#)

[Metric 6a.1 and 6b.1](#)

[Metric 7a.1](#)

[Metric 1b](#)

[Metric 5.2](#)

[Metric 6c.1](#)

[Metric 7b.1](#)

[Metric 6c.2](#)

[Metric 7b.2](#)

Metric 1a - Length of Time Persons Remain Homeless

| | Current FY Universe | Current FY Average LOT Homeless | Current FY Median LOT Homeless |
|---------------------------|---------------------|---------------------------------|--------------------------------|
| Persons in ES and SH | 71 | 1159 | 1443 |
| Persons in ES, SH, and TH | 83 | 1022 | 1383 |

Metric 1b - Length of Time Persons Remain Homeless - Including Element 3.17

| | Current FY Universe | Current FY Average LOT Homeless | Current FY Median LOT Homeless |
|---------------------------|---------------------|---------------------------------|--------------------------------|
| Persons in ES, SH, and PH | 73 | 1142 | 1443 |

Step 5: Export CSV for HDX

Used to export the generated data in the HDX format required by HUD. To generate the CSV, click Step 5 which will queue the report. A message will appear to explain that the file will be available to download in about 10 – 20 minutes.

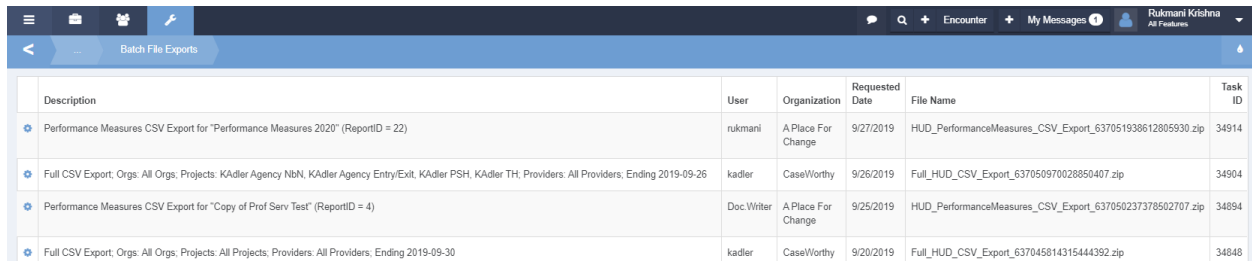
▲ Your CSV file has been queued and will be available to download from your Administration area in about 10 to 20 minutes.

Access Export

The CSV can be accessed on the Batch File Exports form in the All Features role.

Navigation

All Features Role – Admin Tab: Administration → Batch File Exports.



| Description | User | Organization | Requested Date | File Name | Task ID |
|--|------------|--------------------|----------------|---|---------|
| Performance Measures CSV Export for "Performance Measures 2020" (ReportID = 22) | rukmani | A Place For Change | 9/27/2019 | HUD_PerformanceMeasures_CSV_Export_637051938612805930.zip | 34914 |
| Full CSV Export: Orgs: All Orgs; Projects: KAdler Agency NbN, KAdler Agency Entry/Exit, KAdler PSH, KAdler TH; Providers: All Providers; Ending 2019-09-26 | kadler | CaseWorthy | 9/26/2019 | Full_HUD_CSV_Export_637050970028850407.zip | 34904 |
| Performance Measures CSV Export for "Copy of Prof Serv Test" (ReportID = 4) | Doc.Writer | A Place For Change | 9/25/2019 | HUD_PerformanceMeasures_CSV_Export_637050237378502707.zip | 34894 |
| Full CSV Export: Orgs: All Orgs; Projects: All Projects; Providers: All Providers; Ending 2019-09-30 | kadler | CaseWorthy | 9/20/2019 | Full_HUD_CSV_Export_637045814315444392.zip | 34848 |

The record's Action Gear provides the following functionality:

Download File – Once the record includes a File Name, the Zip file can be downloaded and saved locally

Delete Report – Allows you to delete the selected report file