Housing Stability Counseling Program
Reporting Guide

The guide below has been created to assist you in completing and addressing issues with the continuous and quarterly surveys in the Online Reporting System (ORS) for the Housing Stability Counseling Program (HSCP) grant.

- If you need additional guidance on HSCP requirements, please visit https://www.stablecommunities.org/HSCP for resources and program information.
- If you have programmatic questions, please reach out to counseling@nw.org for assistance.

Only grantees will have access to the ORS and should be reporting to NeighborWorks. Sub-grantees should provide reportable data to their grantee, who is responsible for reporting that data to NeighborWorks.

Click on the report section and/or topic below to navigate to that section of the guide. You can use the "Back to top" link at the bottom of each page to navigate back to this table of contents.

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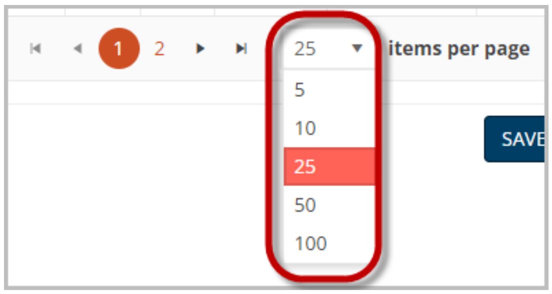
ORS Grid Tips and Reminders

Below are tips and reminders to reference when working in the HSCP Continuous Survey's client record grid, or when uploading records to the grid/survey.

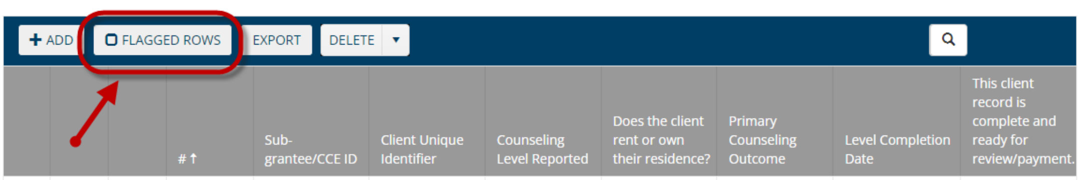
Number of Records Per Page

ORS defaults to show 25 records per page. However, you can change the number of records in the view using the drop-down at the bottom of the grid. Your selection will stay for the remainder of your session.



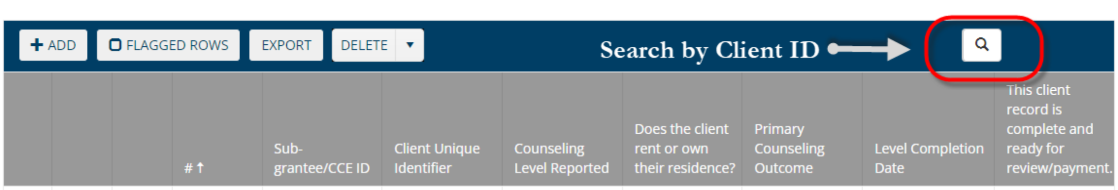
Filter to Flagged Records to Easily Resolve Flags

If you have uploaded records and have flags that need to be addressed, you can filter the grid to only show flagged rows (i.e., those with red/blue/yellow flags and incomplete items) by using the "Flagged Rows" filter at the top of the grid. To remove the filter, simply click the "Flagged Rows" filter to clear it.



Search by Client ID

If you need to locate a particular client record, use the "Search" field at the top of the grid to search by Client ID.



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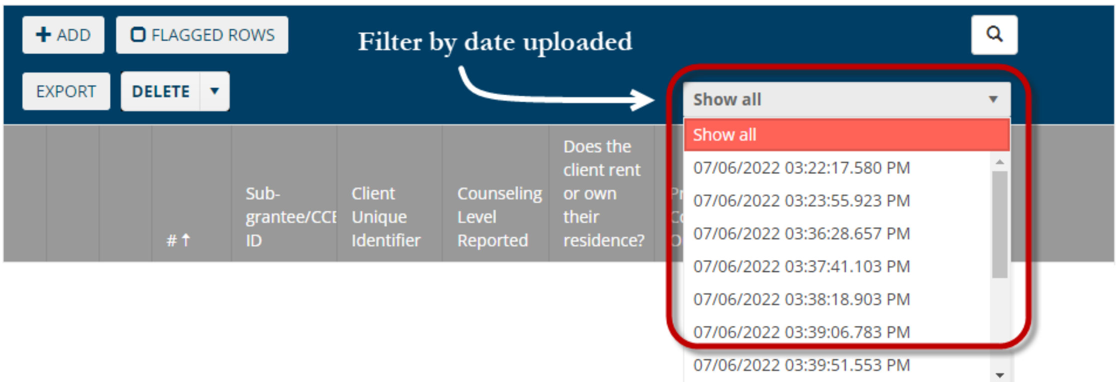
Filter by Upload Date

New feature – July 2022

The dropdown filter at the top of the grid will allow you to filter records by the date they were uploaded.

Note that any uploads completed before this new feature was integrated (July 2022) will not show in the dropdown menu but will be included in the "Show All" selection.



Uploading Large Excel Files

If you are uploading an Excel file in ORS, ensure that you are only uploading 500 records at a time. If you have more than 500 records to upload, it is best to break those down into smaller files so only 500 are uploaded at a time. Uploading files with more records may result in system timeouts or other upload issues.

ORS Excel Template – Responses of "Other"

If you are using the ORS Excel template to track and/or report HSCP client records and need to select "Other" for one of the dropdown responses because the response you need is not listed, you will need to include the detailed information (the response itself) as well.

In the cell, manually enter "Other (*Example*)", replacing the "Example" with the client's response that was not listed in the dropdown menu. Upon upload, ORS will select "Other" from the drop-down menu and will enter the custom text in the parentheses in the custom text field. *If you only select "Other" in the Excel file and do not provide the detailed response, ORS will not upload the "Other" response and will require the information after upload (will show as incomplete data point).*

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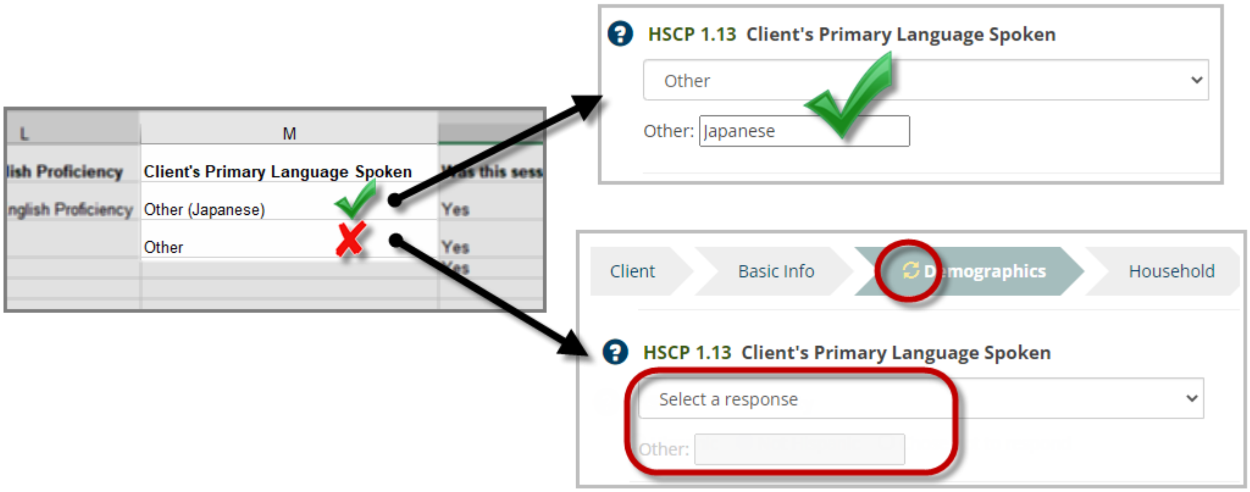

<u>Remember that this is the only time you should enter a custom response in a dropdown menu in the Excel template</u>. Entering custom responses in any dropdown menus (aside from that described above) will not be read into ORS at upload and will result in an incomplete data point that will need to be updated manually.

Validate Page

After uploading an Excel file, be sure to click the “Validate Page” button at the top or bottom of the page. If you are uploading multiple Excel files, it is recommended that you validate the page after each upload, to ensure you can easily identify and address issues as you upload records.

Some validation checks are not completed during the upload process and are instead run from the page level. If you do not run the “Validate Page” function after upload and instead log out, the system will run the validation the next time you log into the system, showing any new flags/issues from the most recent upload(s).

For more information about validation flags, please see the Validation Errors (Flags) section below.

Re-Validate Page

New feature – July 2022

If you need to go into a record to make corrections, you can now re-validate the survey using the “Validate Page” button within the client record. This will run the same validations as the “Validate

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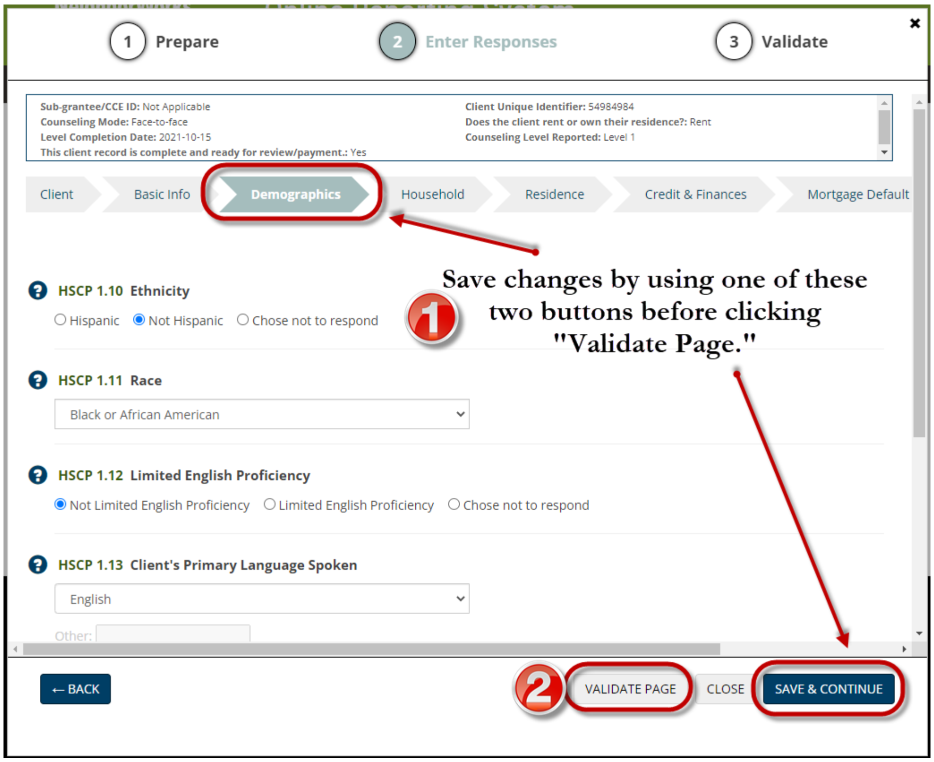
Page” button on the page-level but saves you a bit of time so you can re-validate and navigate to another issue without closing out of the client record and clicking “Validate Page” on the page level.

Before running “Validate Page” in the counseling record, be sure that you save any updates you made in that counseling record by either clicking the tab at the top to save/refresh the active tab at the top of the page or clicking “Save and Continue” at the bottom of the page.



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HSCP Continuous Survey (Client Records)

Reporting HSCP Client Counseling Records

When to Report

Client counseling records should be included in the continuous report only once the counseling level has been completed. Please keep in mind that a client must have a Level 1 entry before their Level 2 or Follow-up counseling records can be uploaded/entered.

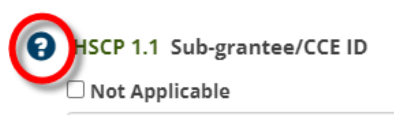
How to Report

Client counseling records can be added to ORS in one of the following ways:

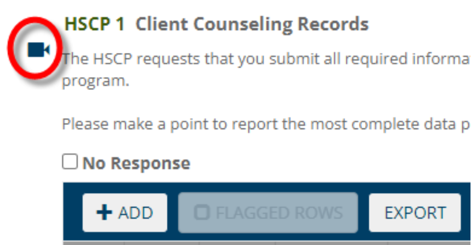
- Upload Excel export file from CounselorMax or other client management system (CMS) that allows for export of the appropriate file in an uploadable format. *See instructions below*.
- Upload completed Excel template with client counseling records. *See instructions below*.
- Manually enter client counseling records into ORS. *See instructions below*.

Support Resources in ORS

Help text is available for most items – to expand (or re-collapse) the help text, simply click the question mark symbol to the left of the item.



There is also a short **training video** available that can be accessed by clicking the video camera icon next to the grid title. This video shows more detailed step-by-step instructions for completing the fields in each tab.



Additional support and guidance can be found in the Document Library at the bottom of the Support page in ORS.

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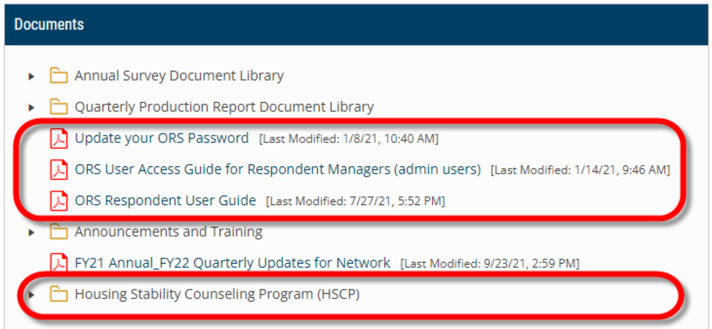


Preparing Excel Files for Import

If your organization uses CounselorMax or another client management system (CMS) that allows for export of the appropriate customers in an uploadable format (Excel), you can upload the exported Excel files rather than completing manual data entry.

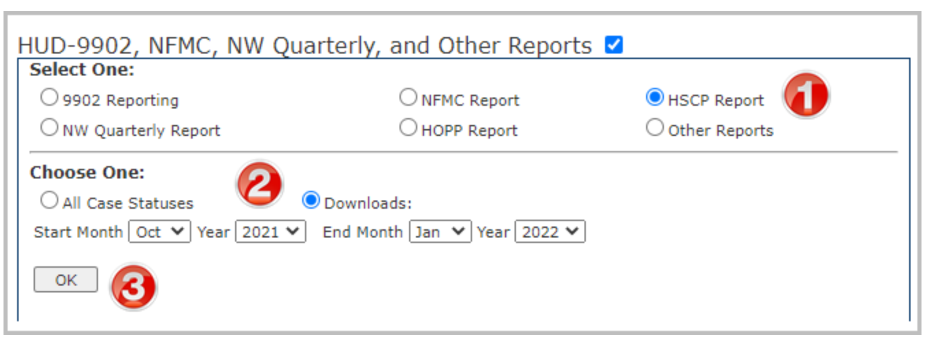
Guidance below provides information on how to prepare your Excel files for upload. See "Importing Excel Files in ORS" for step-by-step instructions on how to upload the completed Excel files.

If using a data system other than CounselorMax, an Excel template and Data Dictionary are available within the HSCP continuous survey to assist you in building a custom export file that will be accepted by ORS.

Option 1: Exporting from CounselorMax

If using CounselorMax, all required fields must be complete for the customer to appear in the export file.

1. Log into CounselorMax and navigate to the "Reporting" tab.
2. Select "HSCP Report" as the report type. Select the "Downloads" radio button and select the export dates for your report.



3. Click OK.
4. Open the export file and File → Save As.
5. Save the file with file type of ".xlsx" and save. Follow the instructions below to import your CounselorMax file into ORS.

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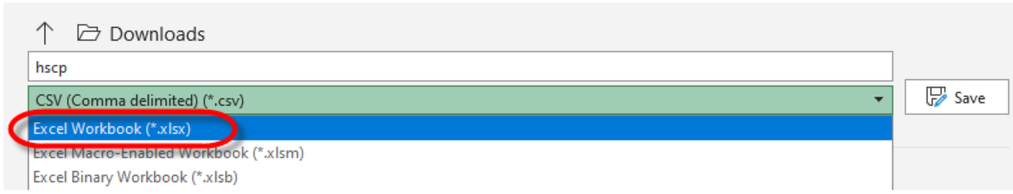


Option 2: Custom Export from other CMS

If your organization uses another client management system (not CounselorMax) that allows custom data exports, you (or the CMS manager/designer) may be able to create a custom-built export to upload into ORS. If you already have this functionality, follow the steps below to upload your exported Excel files into ORS.

If building a custom report for this purpose, the Data Dictionary (available in ORS) contains information that would be needed, including item formatting.

NeighborWorks Compass does not currently include a standard export template for HSCP.

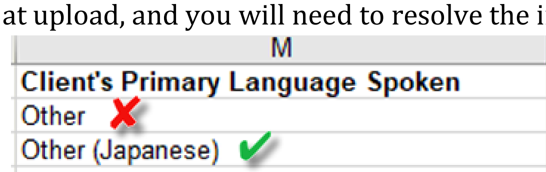
Option 3: ORS Excel Template

If your organization would like to use an Excel templates to upload completed HSCP counseling records, rather than completing manual entry, you can download the Excel template from ORS.

Keep in mind that not all fields are required for all counseling levels (e.g., demographic data). When completing manual data entry, ORS will automatically skip data points that are not needed. While Excel cannot identify these data points for you, upon import, ORS will identify whether any necessary information is missing, and will not upload data that is not necessary for the counseling record.

Important things to keep in mind when using the ORS Excel Template:

- If a data point is not applicable (e.g., you would select the “Not applicable” opt-out button for the data point), leave the cell blank in the Excel file. ORS will read this as “Not applicable.”
- If you leave required cells blank that do not have a “Not applicable” response option, there will be missing data at upload that will need to be updated. *You will receive flags for these incomplete data points.*
- If the “Other” response option in a drop-down menu is appropriate for the client, select “Other” and write the custom text response in parentheses after the word “Other.” *This is the only instance where you should enter custom text into a drop-down menu.*
    - If you upload a response of “Other” with no custom text entered, it will result in a missing response at upload, and you will need to resolve the incomplete response.

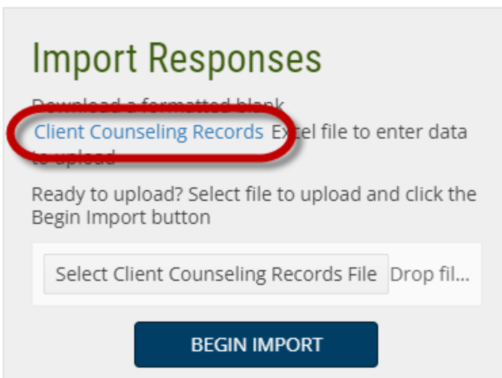


<u>Do not do the following, as they will result in errors at upload</u>:

- Do not change the formatting of any cells.
- Do not insert, remove, or change the order of any columns.
- Do not enter custom responses for data points with drop-down menus (*with the exception of "Other" responses described above*).
- Do not save the file in another format; ORS will only upload ".xls" and ".xlsx" files.

Once you've logged into ORS, there are two ways to obtain the Excel template:

1. Option 1: Download the templates from the Support library.
    a. Click the "Support" tab at the top of the screen.
    b. Scroll to the bottom to locate the Document Library.
    c. Expand/open the "Housing Stability Counseling Program (HSCP)" folder.
    d. Click the "Upload Template – HSCP Continuous Survey" template to download.
2. Option 2: Download the templates from the Housing Stability Counseling Program survey.
    a. Navigate to the continuous and click "Begin" or "Continue" to go into the survey.
    b. Select the *Client Counseling Data* section of the survey.
    c. Click "Add" at the top of the grid.
    d. Click the hyperlinked "Client Counseling Records" file to download the linked Excel template.



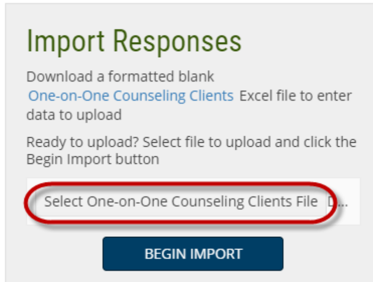
3. Complete the Excel template as appropriate for the clients that are ready to be reported and save the completed files to your computer/server.
    a. *For an outline of conditional data points (i.e., data points that are not required based on certain criteria), see the "Conditional Guide for Upload Template – HSCP Continuous Report" in the HSCP Support Library within ORS.*
4. Follow the instructions below to upload the Excel files to ORS.

Importing Excel Files in ORS

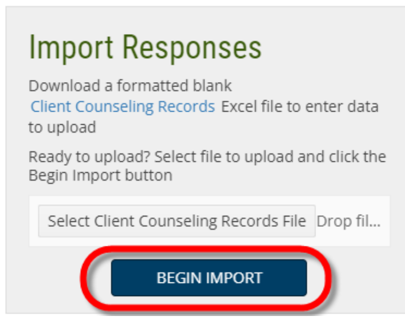
If your organization has an Excel file with client data to import into ORS (i.e., will not be entering data manually), follow the steps below to import your completed Excel file into ORS. Note that some updates may be necessary after upload to address missing data, validation flags, etc.

1. Navigate to the continuous survey and click "Begin" or "Continue" to go into the survey.

2. Select the *Client Counseling Data* section of the survey.
3. Click "Add" at the top of the grid.
4. In the *Import Responses* section, click the "Select Client Counseling Records File" button. Locate your completed Excel template and click OK.
    a. *Alternatively, you can drag your Excel file over and drop it on top of this button.*



5. Click "Begin Import." *It may take several seconds for the upload to complete.*



    a. If your organization already has data entered, you will see a notification that requires you to select what you would like to do – click "Append" to add this new data to your existing data. *"Replace" is intentionally deactivated so you do not replace data that has already been uploaded and/or approved.*

6. Upon import, ORS will automatically look for data points that may need attention and will notify you of those data points when confirming the file uploaded successfully (sample screenshot below). Click "Continue" to close out of the pop-up. *If issues were identified, you can address those directly in the data grid.*

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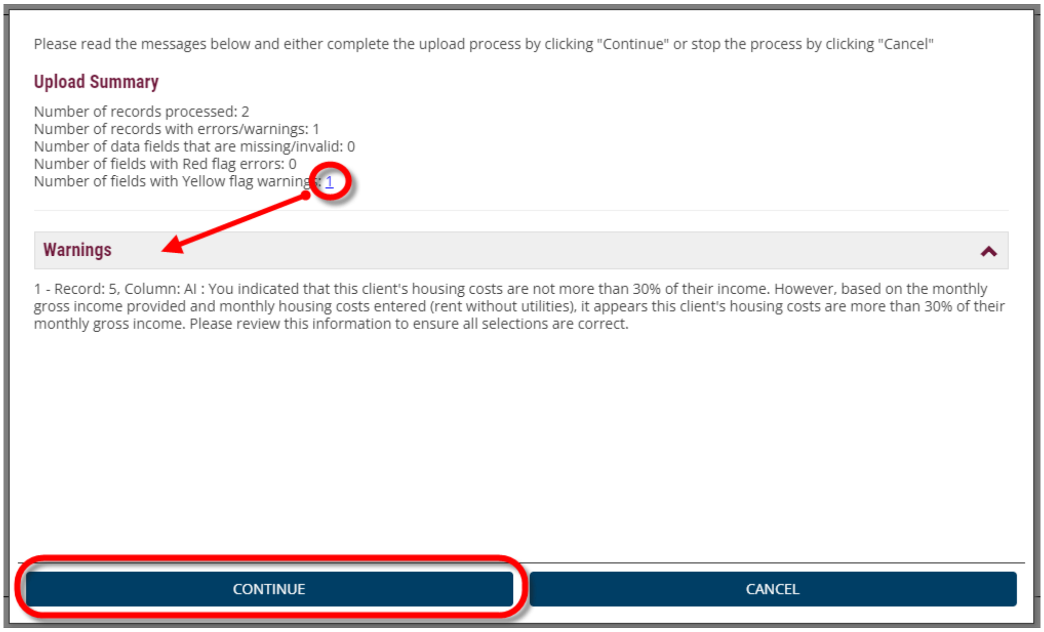
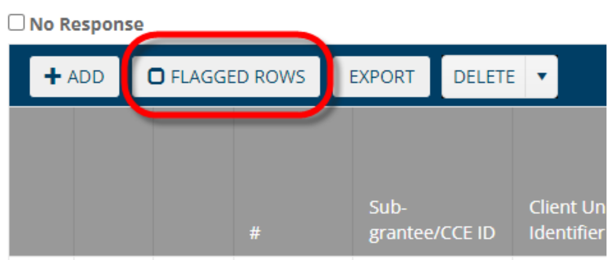
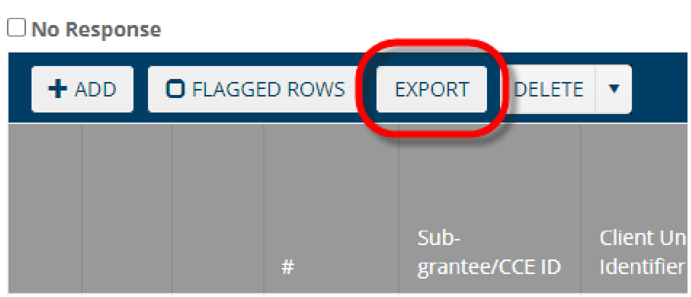


7. If your organization has multiple files to import/upload, repeat these steps to upload all applicable Excel templates.
8. Once all applicable counseling records have been imported, click "Validate Page" to run a final validation on all reported records. If any issues are identified, address the issues, and re-validate the page until ORS notifies you that all responses are valid.

   a. *To more easily address records that have active flags and/or incomplete items, you can use the "Flagged Rows" button in the grid header to filter the grid to only show rows that have active issues. You can click this button again to un-filter the rows.*



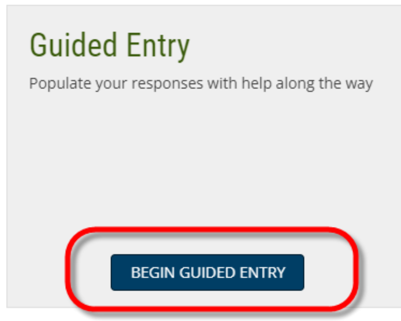
9. If desired, you can use the "Export" button to export the records that have been reported to date; the export file will be in Excel format.



Guided (Manual) Data Entry for HSCP Records

The guidance provided below is intended for users who are entering client counseling records into ORS manually, but may also be helpful for organizations/grantees that are using the upload template from ORS.

1. In *Client Counseling Records*, click "Add" to add your first client counseling record.
2. Click "Begin Guided Entry" in the new window. *This will open the screen to enter the required fields to report the client's counseling record.*

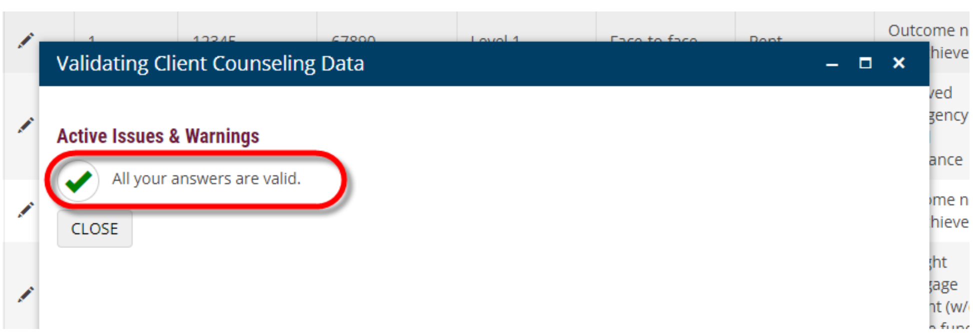


3. It is important to complete the data points in the order they are presented in ORS. ORS has logic built in to automatically identify fields that are not necessary based on your selected responses, and to identify potential inconsistencies or incorrect data throughout the entry.

4. **Client** – enter the sub-grantee ID (if applicable), client ID, counseling level, and counseling method.
    a. *Remember that a client's Level 2 and Follow-up counseling records cannot be entered before their Level 1 record.*
5. Click "Save and Continue" (at the bottom right) or click the "Basic Info" tab to save your entries and move on to the next tab.

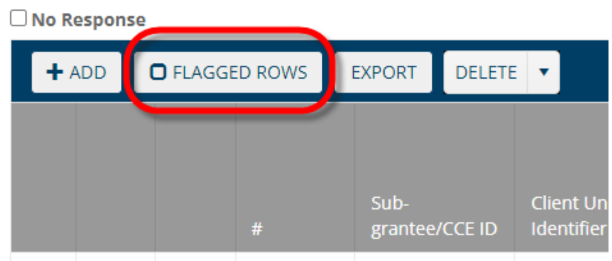
6. **Basic Info** – complete this tab with the appropriate information for this customer's services. *Expand the help text if you need more information on any of these data points.*
    a. Intake Date – Remember that the intake date cannot be before the program start date (9/8/2021).
    b. Does the client rent or own their residence – Identify whether the client rented or owned their residence as of their *program intake date*.
        i. *This information will drive other data points within the survey.*
7. **Demographics** – enter the customer's demographic information. *These fields and response options align with HUD reporting.*
    a. *Most information on this tab is only collected at Level 1, with the exception of language used for the counseling session.*

8. **Household** – enter the household's gross annual income, household type, reason(s) for housing instability, etc.
9. **Residence** – enter the customer's address.
    a. *This information allows us to geocode entries to determine whether households assisted are within the areas outlined in the program agreement.*
10. **Credit & Finances** – as applicable, report the client's credit score and/or report information and whether they were referred to financial resources to address their housing instability.
11. **Mortgage Default** – this tab will only activate for clients who were identified as a homeowner in HSCP 1.5 (Does the client rent or own their residence?). Complete the data points as applicable for the homeowner.
12. **Rent** – this tab will only activate for clients who were identified as a renter in HSCP 1.5 (Does the client rent or own their residence?). Complete the data points as applicable for the renter.
13. **Outcome** – select the primary (and secondary, if applicable) outcome(s) that the customer achieved upon completion of this level of counseling. *See help text for more details about each outcome type.*
    a. Outcomes will filter based rent/own status. There is also an "Outcome not achieved" response option available in case the client did not achieve a measurable outcome for the reported level of counseling.
    b. <u>Level Completion Date</u> – Enter the date the client completed this level of counseling.
    c. <u>This client record is complete and ready for review/payment</u> – A response of "Yes" indicates that this client counseling record is complete and ready for review. A response of "No" will indicate to the HSCP team that the counseling record is not yet complete and will not be reviewed for accuracy and/or payment until it is marked as "Yes."
14. Click "Save and Validate." If the system identifies any missing items or invalid responses, address the issues before moving on.

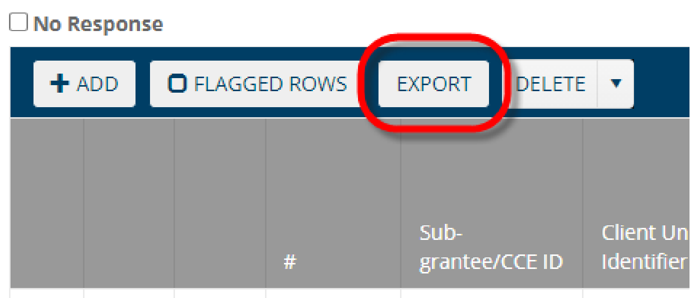


15. Once all applicable counseling client records have been entered, click "Validate Page" to run a final validation on all reported records. If any issues are identified, address the issues and re-validate the page until ORS notifies you that all responses are valid.

a. *To more easily address records that have active flags and/or incomplete items, you can use the "Flagged Rows" button in the grid header to filter the grid to only show rows that have active issues. You can click this button again to un-filter the rows.*



16. If desired, you can use the "Export" button to export the records that have been reported to date; the export file will be in Excel format.



Validation Errors (Flags)

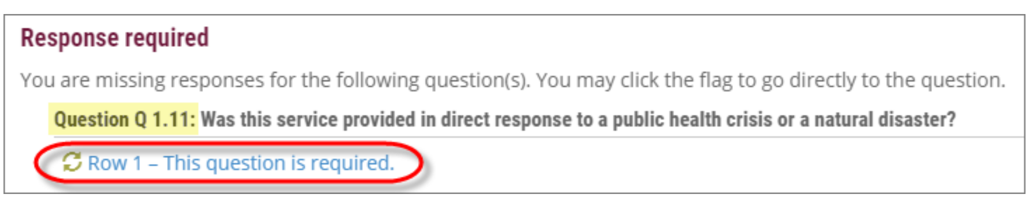
There are four types of validation messages (flags) in the Online Reporting System. The validation flags are integrated into the system to assist you with maintaining data integrity and offer information about what "typical" responses may be.

In the HSCP Continuous Survey (Client Records), all flags and incomplete items must be addressed in order for the client counseling record to be reviewed for payment.

Incomplete		This symbol indicates an incomplete item. This item must be completed before the page/section can be marked "Completed." *Surveys cannot be submitted with incomplete items.*
Red Flag		This symbol indicates a red flag. The issue described in the validation message must be fixed before the page/section can be marked "Completed."
Blue Flag		This symbol indicates a blue flag. The items/issue described in the validation message must be reviewed and either resolved (if responses were incorrect) or a [required] explanation provided (if responses are correct) describing why the data is correct as-is.
Yellow Flag		This symbol indicates a yellow flag. Similar to a blue flag, the items/issue described in the validation message must be reviewed and either resolved (if responses were incorrect) or an [optional] explanation provided (If responses are correct) describing why the data is correct as-is. *While surveys can be submitted with unaddressed yellow flags, it is strongly encouraged that sites address these flags, as the Data Collection team may contact you with questions during the quarterly analysis if an explanation was not provided.*

How to Address a Flag

- **Incomplete**
  - If you have an incomplete item, the system will pop up with an error like the one in the sample screenshot below. To navigate to the incomplete item, simply click the hyperlinked message or you can manually navigate to the item using the item number.



- **Red Flag**

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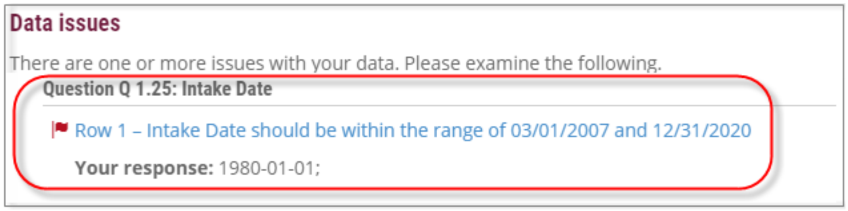
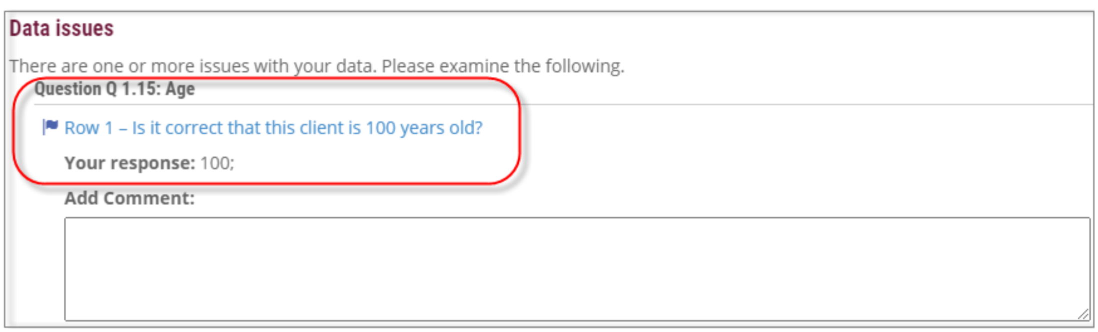
- If you have a red flag, the system will pop up with an error like the one in the sample screenshot below. You will need to fix the issue and can do so by clicking the hyperlinked validation message.

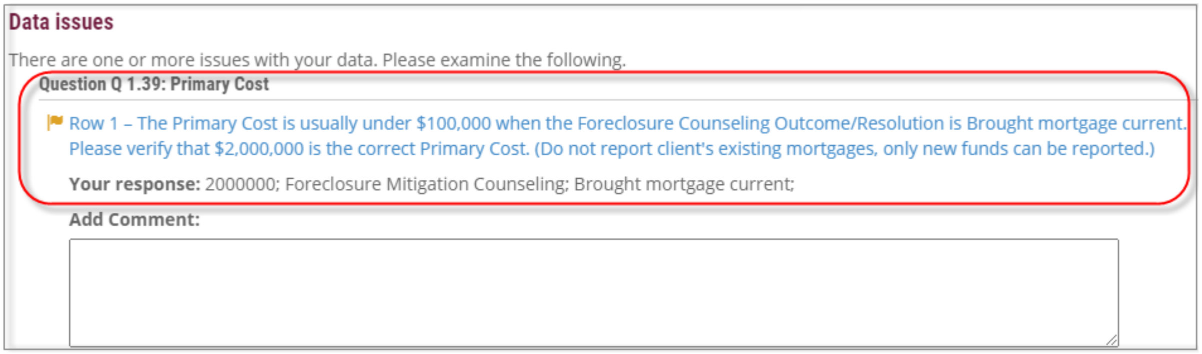


- **Blue Flag**
  - If you have a blue flag, the system will pop up with an error like the one in the sample screenshot below. You will need to either fix the data (if it is incorrect) or enter an explanation (if the information is correct) describing why the information is correct as-is. You can click on the blue hyperlinked validation message to navigate to the questions if you'd like to review further. *If the issue is not resolved, a comment is required.*
    - <u>If you enter a comment</u> in the validation pop-up window, **be sure to click "Close" at the bottom** of the window once you have completed your comments. <u>Do not close using the "X" at the top of the window</u>. Closing the window using the "X" will not save your comments.



- **Yellow Flag**
  - If you have a yellow flag, the system will pop up with an error like the one in the sample screenshot below. You will need to either fix the data (if it is incorrect) or enter an explanation (if the information is correct) describing why the information is correct as-is. You can click on the blue hyperlinked validation message to navigate to the questions if you'd like to review further. *If the issue is not resolved, a comment is strongly recommended.*
    - <u>If you enter a comment</u> in the validation pop-up window, **be sure to click "Close" at the bottom** of the window once you have completed your

comments. Do not close using the “X” at the top of the window. Closing the window using the “X” will not save your comments.



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Quality Control (QC) Review Process

What is the Quality Control (QC) Review Process?

The NeighborWorks HSCP team will review submitted/uploaded data to ensure the data is consistent, accurate, and complete. If any potential errors or outlier data is identified, the HSCP team will reach out to address the issue with you.

It is important that you respond quickly to these requests, as the turnaround time for correcting data is often short, particularly for the quarterly report. If any issues in the quarterly report are left unaddressed when the data is finalized, those issues will not be able to be fixed down the road. Once data is committed to the database it is no longer subject to change. Therefore, it is important to respond in a timely manner to ensure all necessary corrections can be completed before the data is finalized.

Potential issues can vary greatly – the HSCP team may reach out to you because there is a definite issue that requires a response to be modified (e.g., duplicate client counseling records, incorrect percentages reported for PRS funds spent in the quarter). However, some may be inquiries to ensure we better understand an activity/data point and can confirm it is reported correctly.

Any potential corrections will need to be completed within the deadline provided by the HSCP team to ensure all appropriate corrections are complete while the data can still be edited.

Continuous Survey – Quality Control Review Process

Some examples of issues that may be identified during the quality control process for the HSCP Continuous Survey and cause a row to be identified for corrections may be:

- Missing data
- Potential data entry errors *(e.g., entered $20,000 instead of $2,000 or $80 instead of $800)*
- Validation flag not addressed/not adequately addressed
- Duplicate counseling level records for a client between organizations
- Incomplete address

Status Icons for Reviewed Records

Status icons will indicate whether a record has been reviewed and whether it is available for editing. You may see any of the icons in the table below for your organization's records in the HSCP Continuous survey. If a record is no longer editable, you can still review the data (in read-only mode) by clicking on the icon next to the counseling record. *Records that are not editable (have been approved) cannot be deleted.*

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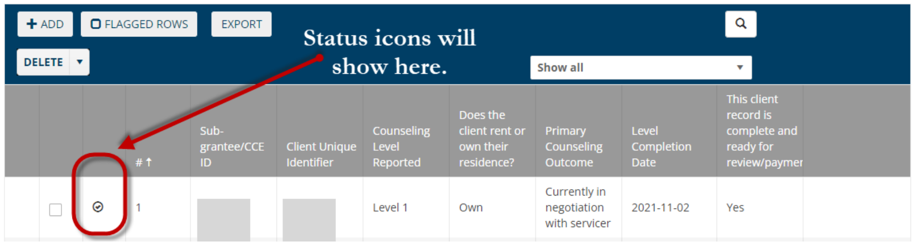


Icon	Description	Can record be edited or deleted?
	**Reviewed** – Record has been reviewed (not yet paid/unpaid). *Black check mark in circle.*	No
	**Rejected** – Record has been rejected for corrections. *Look at the top of the page for notes in yellow explaining why the record was rejected.* *Red circle with white exclamation point.*	Yes
	**Reviewed and paid** – Record has been reviewed, approved, and paid. *Green dollar sign.*	No
	**Reviewed but not paid** – Record has been reviewed and approved, but not yet paid. *Red dollar sign.*	No
	**Pending** – Record is being reviewed and is locked for the quality control review process. *Green clock face.*	No
	**Open** – Record is open and editable, has not yet been reviewed. *Black pencil.*	Yes

Resolving Quality Control Issues in ORS

Sometimes a potential issue is correct as-is and we just need some additional information from you confirming the data. However, other times corrections will need to be made in the counseling records in ORS. In these cases, we will re-open the applicable counseling record and provide guidance as to what will need to be updated and why. Once the applicable corrections have been completed, please contact counseling@nw.org to notify us that the updates are complete.

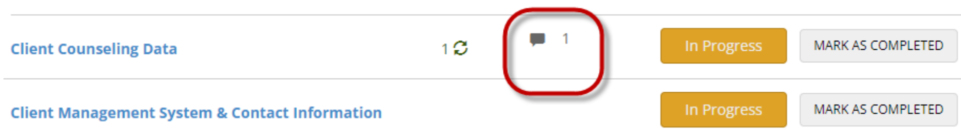
The process will generally look like this:

1. You will receive a notification, either through ORS or directly from the HSCP team.
2. Follow the guidance provided in the notification.
    a. If you receive a request for information to be changed, follow the next steps below.
    b. If you receive an inquiry (via email), respond to the inquiry as soon as possible to help the HSCP team determine whether information is okay as-is or if a correction needs to be made in ORS.

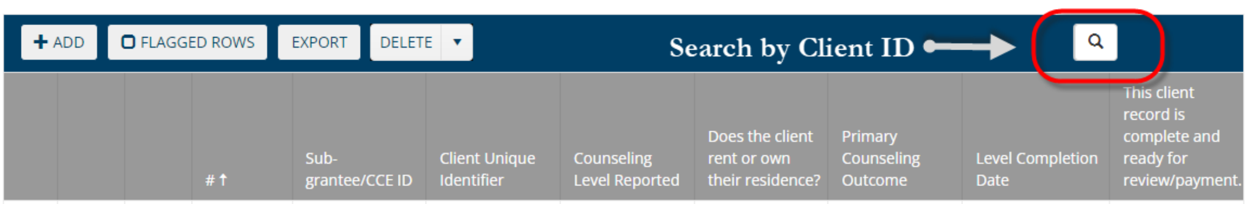
        i. If the former (data okay as-is), the HSCP team will make note of your comment/explanation and no further steps need to be taken once the discussion is complete.

        ii. If the latter (corrections needed), follow the next steps below.

3. Log into ORS and locate the HSCP Continuous survey.
4. Click “**Continue**” to enter the survey and make corrections.
5. Click the “Client Counseling Data” page to complete updates.
    a. *You may see a note icon on the Table of Contents page. If so, this means that there is a note available explaining what needs to be changed. This will be visible once you go into the Client Counseling Data page.*



6. If you received notification via email, issues may not be identified by row/record as demonstrated in the next step. In this case, it may be helpful to use the “Search” button at the top of the grid to locate the appropriate client records (search by Client ID).



7. Review the comment(s) at the top of the page and make the appropriate corrections.
    a. The row(s) that need(s) to be addressed will show a red exclamation point symbol. Approved rows will show a checkmark.
        i. *To easily find the row(s) that need(s) correction, click the “Flagged Rows” button at the top of the grid. This will filter the grid to only show rows that have a red exclamation point. To un-filter the grid, simply click the “Flagged Rows” button again.*
    b. Click the red exclamation point to open the record that needs to be corrected, make the appropriate corrections, and save and close the record.
    c. If additional records need to be updated, repeat this step.

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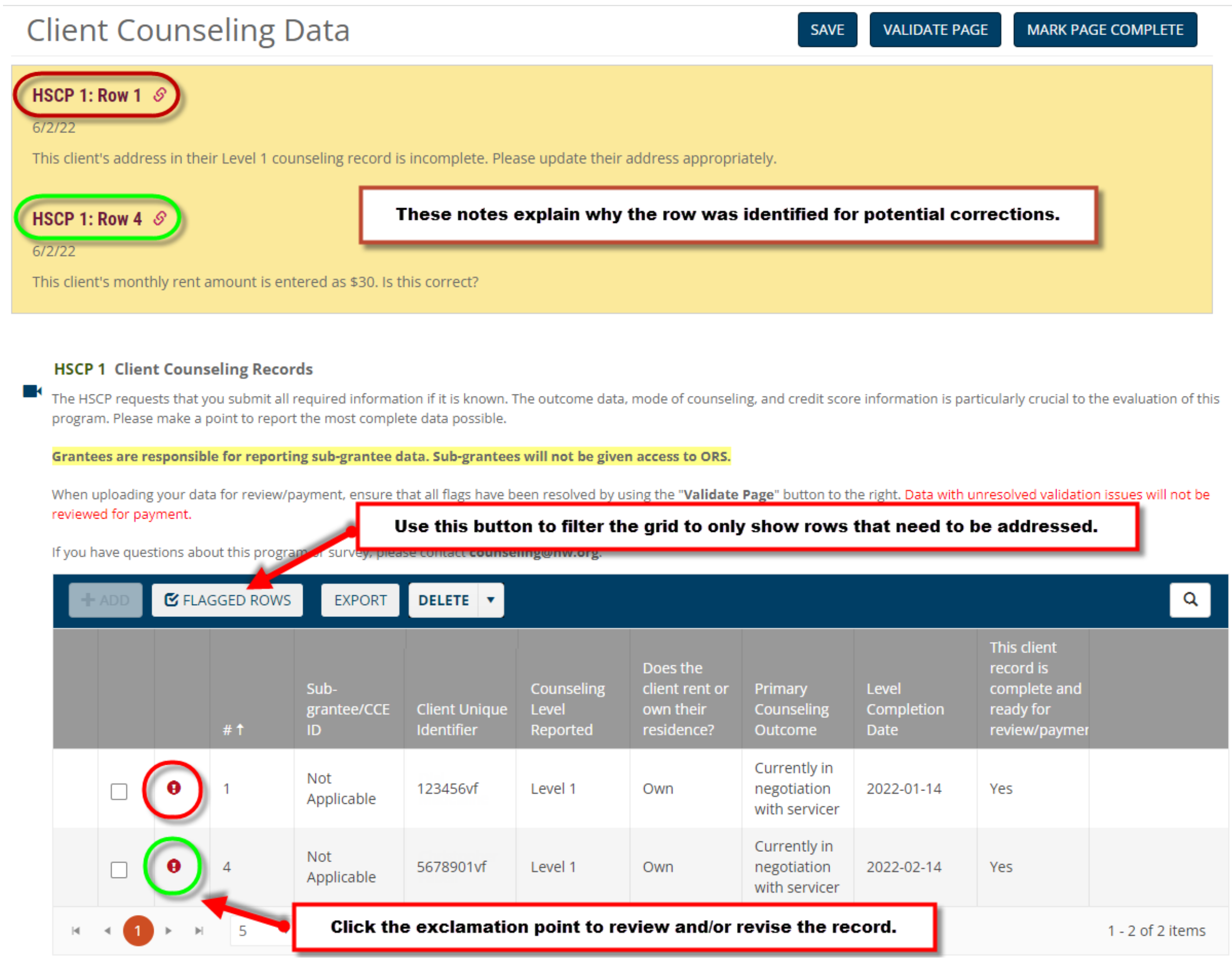

8. Once corrections are complete, validate the page to ensure no new validation flags were created following the change.
    a. *If new flags do come up, be sure to address those before notifying the HSCP team.*
9. Notify the HSCP team (counseling@nw.org) that the corrections have been completed.

Quarterly Report – Quality Control Review Process

The HSCP Quarterly surveys are where your organization reports organization-level information and program progress. After the deadline has passed, the HSCP team will review the quarterly report data and contact you with any questions or concerns they may have identified.

Some examples of issues that may be identified during the quality control review process and cause a data point or section to be identified for corrections may be:

- Program Related Support (PRS) Funds reported incorrectly
- Incomplete data
- Potential data entry errors *(e.g., 99% instead of 9%)*
- Validation flag not adequately addressed

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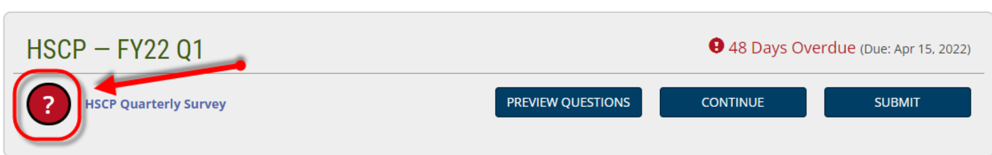
Resolving Quality Control Issues in ORS

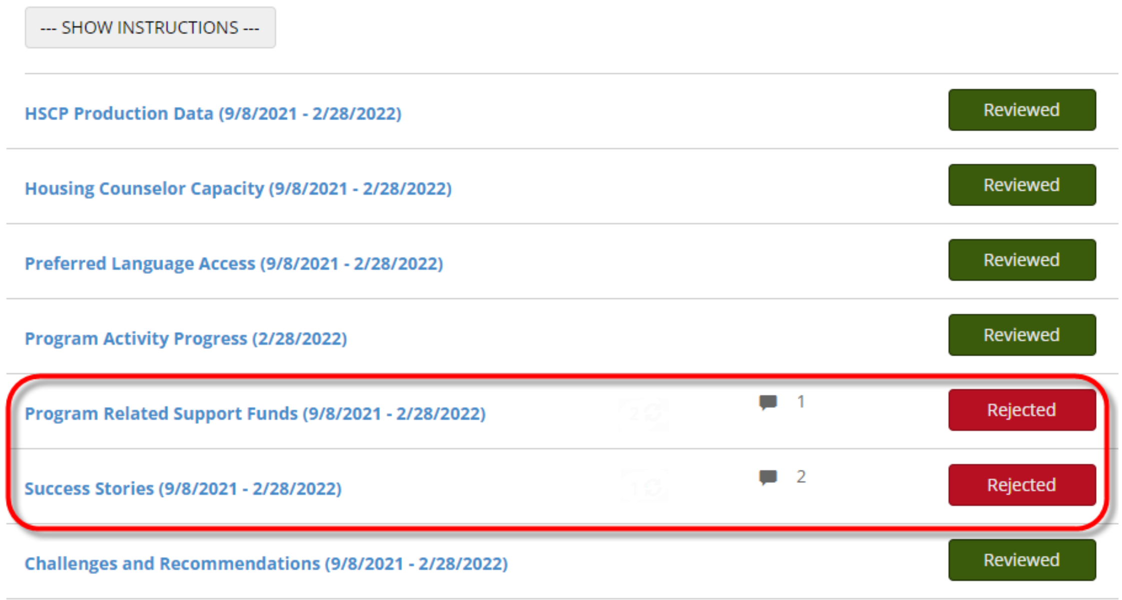
Sometimes a potential issue is correct as-is and we just need some additional information from you confirming the data. However, other times corrections will need to be made in ORS. In these cases, we will re-open the applicable section/page and provide guidance as to what will need to be updated and why. Once the applicable corrections have been completed, you will need to re-submit the survey in ORS.

The quality control review process for the quarterly report will generally look like this:

1. You will receive notification, either through ORS or directly the HSCP team.
2. Follow the guidance provided in the notification.
    a. If you receive a request for information to be changed, follow the next steps below.
    b. If you receive an inquiry, respond to the inquiry as soon as possible to help the HSCP team determine whether information is okay as-is or if a correction needs to be made in ORS.
        i. If the former (data okay as-is), the HSCP team will make note of your comment/explanation and no further steps need to be taken once the discussion is complete.
        ii. If the latter (corrections needed), follow the next steps below.
3. Log into [ORS](ORS) and locate the HSCP quarterly survey.
4. If a section has been re-opened for corrections, the survey status icon will show as a red circle with a question mark.



5. Click "**Continue**" to enter the survey and make corrections.
6. The page(s) that is/are re-opened will show a red "Rejected" button. Click the section title or red button to enter the section and make updates.
    a. *Reviewed/approved pages will show a green "Reviewed" button.*
    b. *There will be a note symbol on the Table of Contents page for rejected sections – this note will be visible once you open the section/page.*



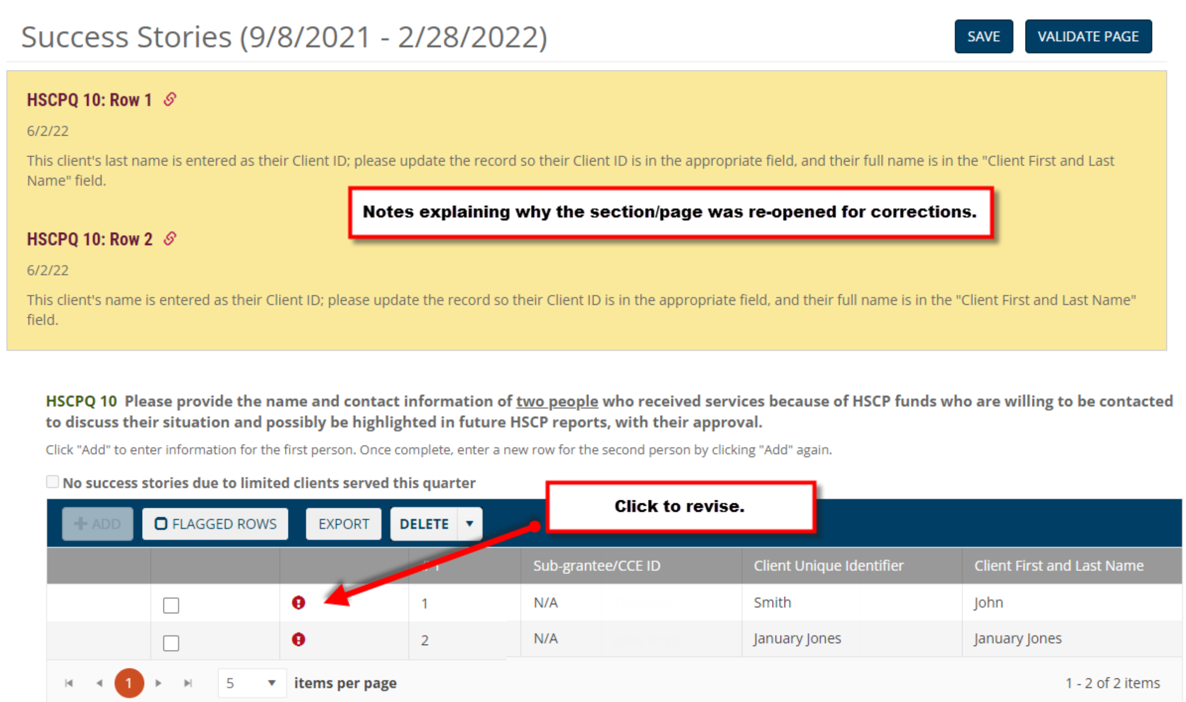
7. Review the note at the top of the page and make the appropriate corrections.

   a. **Grids/individual grid records**

      i. In a grid, the row(s) that need(s) to be addressed will show a red exclamation point symbol. Approved rows will show a checkmark.

      ii. Click the red exclamation point to open the record that needs to be corrected, make the appropriate corrections, and save and close the record.

      iii. If additional records need to be updated, repeat this step.



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b. **Non-grid questions** – review the comment/note at the top of the page (see image above) and update the appropriate data point(s) on the page.

8. Once corrections are complete, validate the page to ensure no new validation flags were created following the change.
9. Repeat steps 7 and 8 if there are multiple pages that need to be reviewed/revised.
10. Return to the survey's Table of Contents or the Active Surveys screen in ORS and re-submit the survey with changes.

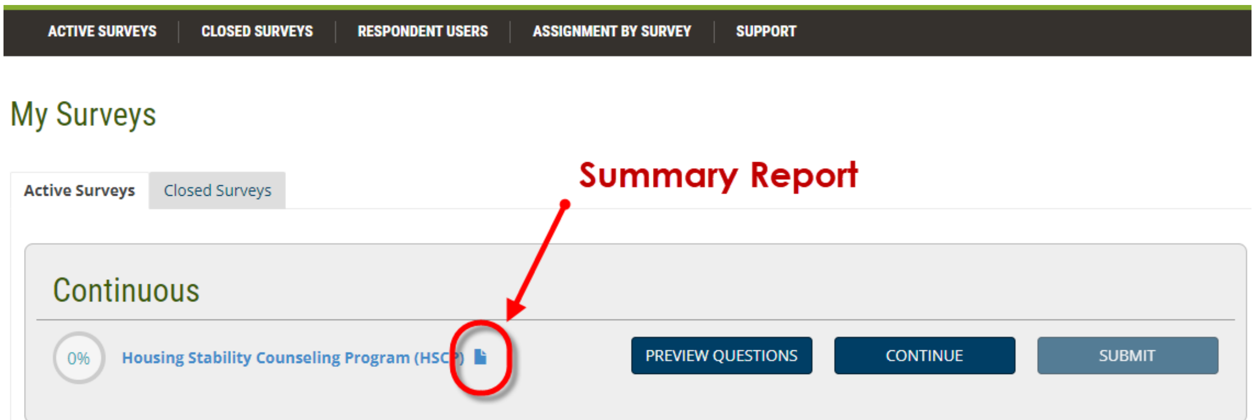
    a. *If desired, you can leave us a comment in the comment box before re-submitting, letting us know what you changed, or any other information you feel may be helpful for us to better understand the activities you've reported.*

Summary Reports

HSCP Continuous Survey – Summary Report (ORS)

The HSCP continuous survey includes a quick Excel report that summarizes the outcomes reported to date, split out by sub-grantee (when applicable).

This report will update in real time as you enter counseling records into the survey. To access the summary report, click on the document symbol to the right of the survey name on the "Active Surveys" screen.



HSCP Dashboard

If you do not have access to the HSCP dashboard and need access, please contact counseling@nw.org for assistance.

The HSCP dashboard displays, by organization, the outputs of the Housing Stability Counseling Program (HSCP). Organizations participating in the HSCP program can use this dashboard to keep track of completed counseling records in various key dimensions.

This tool should be used to complete the HSCP quarterly survey, in accordance with the grant agreement.

Within the dashboard you can:

- Use the dropdown menus at the top of the dashboard to filter by sub-grantee and reporting period.
- Hover your mouse over the charts to get additional information on each data point.
- Switch pages using the navigation buttons at the top of the dashboard.

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FAQs

Programmatic, Situational, and Organization-Specific Questions

If your organization has program-related questions, questions about a particular client/counseling situation, or other organization-specific or unique questions, please contact the HSCP team at counseling@nw.org for assistance.

Excel Upload Issues (Continuous Survey)

- When I upload my Excel file, I receive an error message saying the columns do not match up. What does this mean?
    - This typically means that you are using a customized copy of the upload template that has additional (or different) columns than the original upload template. Please be sure you are using the upload template from ORS and are not making changes to the template columns, formatting, etc.
- When I upload my Excel file, some responses are not populating and show as incomplete after upload, but they were populated in the Excel file.
    - If a custom response was entered into a cell in the Excel file instead of using the pre-set dropdown response options for that data point, ORS will not be able to read in the response and will instead leave the data point blank. Ensure that you are using the dropdown menu selections only (when available) and are not entering custom responses. *See exception below for responses of "Other."*
- I entered "Other" for a data point in the upload template, but when I uploaded the file the data point says it's incomplete (did not populate "Other").
    - "Other" responses are the only time that you should enter a custom response into the Excel template. For a response of "Other," the verbatim response (the "Other" answer that didn't fit into the existing dropdown menu response options) is required; if that information is not included in the uploaded response, ORS will read the item in as incomplete since the required piece of information is missing. If you select "Other" for a dropdown response in the Excel template, you will need to include the response in parentheses after the word "Other." *See above for more detail*.
- I am trying to upload counseling records (1,457 records), but the system keeps timing out.
    - ORS has a timeout limit that cannot be adjusted; however, it performs best when a maximum of 500 records are uploaded at a time. If you have more than 500 records to upload at one time, it is recommended that you separate those out into separate Excel files of 500 (or fewer) records and upload each file separately.

Validation Messages

- I uploaded new counseling records and did not see any errors in the “Upload successful” pop-up, so I logged out. However, I just logged back in and now it shows that I have flagged records. Why did these not show up before?
    - This can happen if you do not run “Validate Page” after uploading records into the continuous survey. While the system runs some validations at the time of upload, other validations are run on the grid-level and must be done separately. Best practice is to upload your new file, run “Validate Page,” and address any identified issues. If you have multiple files to upload, it is best to do this after each file is uploaded so you can address issues as you go.

Quality Control Review Process / Payment

- When are client counseling records reviewed?
    - Client counseling records (that are marked “ready for review”) will be reviewed when your organization reaches the designated disbursement thresholds of 35% (of counseling award), 65%, and 100%.
    - *Please refer to Exhibit D from your organization’s startup documentation for threshold information for your organization. If you have additional questions, please contact counseling@nw.org.*
- How do we let NeighborWorks know that we are ready to have our data reviewed? Is that done by saying “Yes” for *This client record is complete and ready for review/payment* or is there something else we need to do?
    - Selecting “Yes” for this data point indicates to the HSCP team that the counseling record is complete and ready for review. If “No” is selected for this data point, it indicates to the HSCP team that the counseling record is still being updated and will not be reviewed.
    - *For timing on when client counseling records will be reviewed, please see question above.*
- Will we be notified if another organization reported the same counseling level(s) for the same client?
    - Yes, this will be part of the quality control process. ORS can identify duplicate records within your own data but checks across organizations are done during the QC process; if any duplicate records are identified, the organizations will be notified.
- If we need to delete clients or counseling records from ORS because we were told that they are duplicates, how far back can we delete those?
    - Any uploaded, unpaid record can be edited or deleted. Once a record has been marked “Paid,” it cannot be edited or deleted.
- Where do you go to see why the client record has been rejected?

- There will be a yellow note/comment at the top of the page describing any issues that have been identified. The note/comment will indicate whether it is for the entire survey or a particular record/data point. *See Quality Control Review Process (continuous or quarterly) above for more detailed information on addressing identified issues in ORS.*

- How will we know the status of clients/counseling records in the continuous survey?
    - Status icons in each record will indicate the review status and let you know if the record can be edited/deleted. See information above for explanations of each status icon.
- Will "paid/not paid" show for all counseling records for a client or just the final counseling level reported?
    - Statuses will be updated for all counseling records in the grid and each counseling record is reviewed/updated separately; therefore, each record will have its own status. See information above for explanations of each status icon.

Targeted Areas / Program Progress

- Are there reports available that show counts of counseling clients by location (e.g., county they reside in)?
    - Once the data starts coming in and the HSCP team reviews counseling records (paid/not paid), we intend to adjust the dashboard to show number of clients served per county so organizations can measure how close they are to their goals.
    - *Suggestion: Add a filter to the existing dashboard that is available.*
- Is there a dashboard that shows the progress of the entire HSCP cohort?
    - We do have one that is internal-facing for analysis purposes, but do not currently have one that is external-facing. It is helpful to know that organizations are interested in seeing this information. Going forward, the HSCP team will reach out with updates throughout the process, potentially through Basecamp.

ORS Changes / Updates

- Currently if I navigate to a page in the grid (like page 5), open a client record and make edits, and save and close the record, the main screen/grid will navigate back to page 1 and if I need to continue on a later page, I need to navigate to that page again. Is there an update in the works to have the system remain on the grid page after closing a record?
    - This had been a previous fix but appears to have reverted back. We will talk to our developers about fixing this. *From 7/11/2022 HSCP network call.*
- Do updates to the Online Reporting System apply to all existing records, or only new records?
    - Any updates made to ORS will affect all current and future records.