

Qlik Dashboard Manual: “Housing Programs”

Contents

Qlik Dashboard Manual: “Housing Programs”	1
Purpose.....	2
Topic 1: Selecting “Housing Programs” Dashboard	2
Open ‘Agency Dashboards’ Stream	2
Topic 2: Overview Sheet.....	3
Key Data Points.....	3
Selection/Filter Column.....	4
1 of 2 Containers: Occupancy Graph(s)	4
2 of 2 Containers: Data	6
Topic 3: Program Participant Flow Sheet	8
Aggregate Row	8
Selection/Filter Column.....	8
1st Container: Inflow/Outflow Over Time.....	9
2nd Container: Exit Reasons/Destinations	10
3rd Container: Entry/Exit Client List	10
Topic 4: Referrals Sheet	11
Aggregate Row	11
Selection/Filter Column.....	12
1st Container: Referrals, Over Time	12
2nd Container: Referral Outcome Breakdown	13
3rd Container: Referral Info	14
Topic 5: Raw Housing Data	14
Selection/Filter Column.....	14
Topic 6: Filters Sheet	15

Purpose

The purpose of this document is to guide Qlik users on how to use their Housing Dashboards

The intended audience of this document is anyone who will be accessing Qlik on behalf of their agency or program.

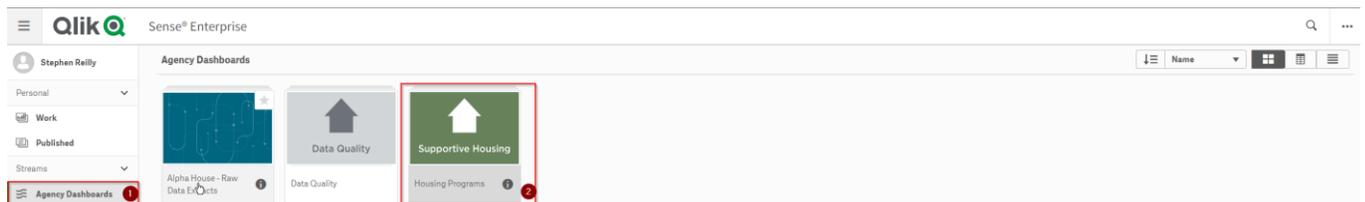
Topic 1: Selecting "Housing Programs" Dashboard

Open 'Agency Dashboards' Stream

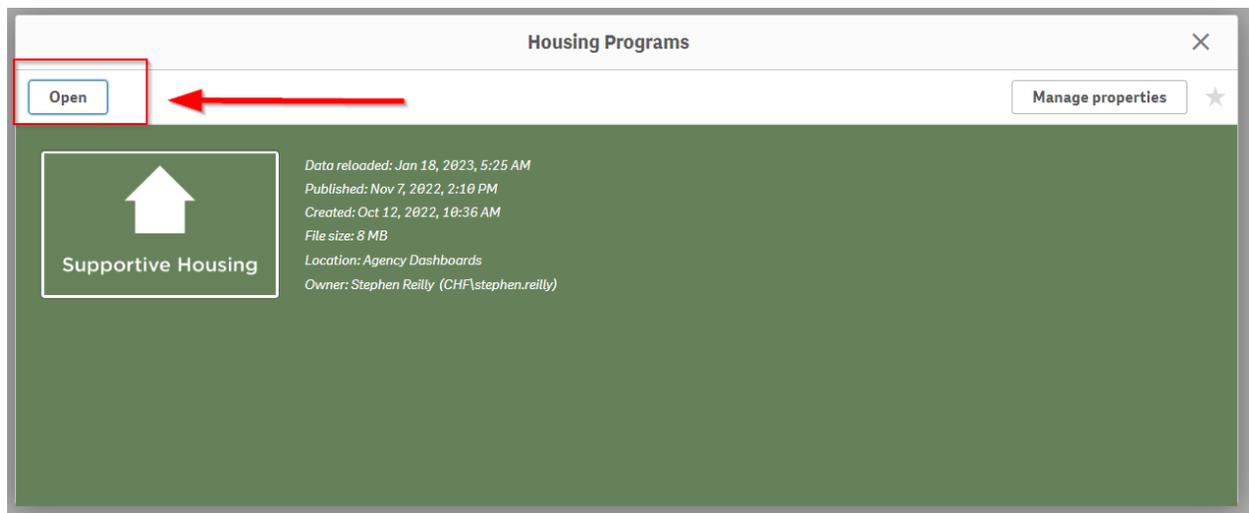
Depending on the user, different Streams of dashboards may be available.

From the left-hand 'Streams' menu, click on the applicable stream.

Depending on the user, multiple dashboards may be available within the applicable stream. Click on the 'Housing Programs' tile.



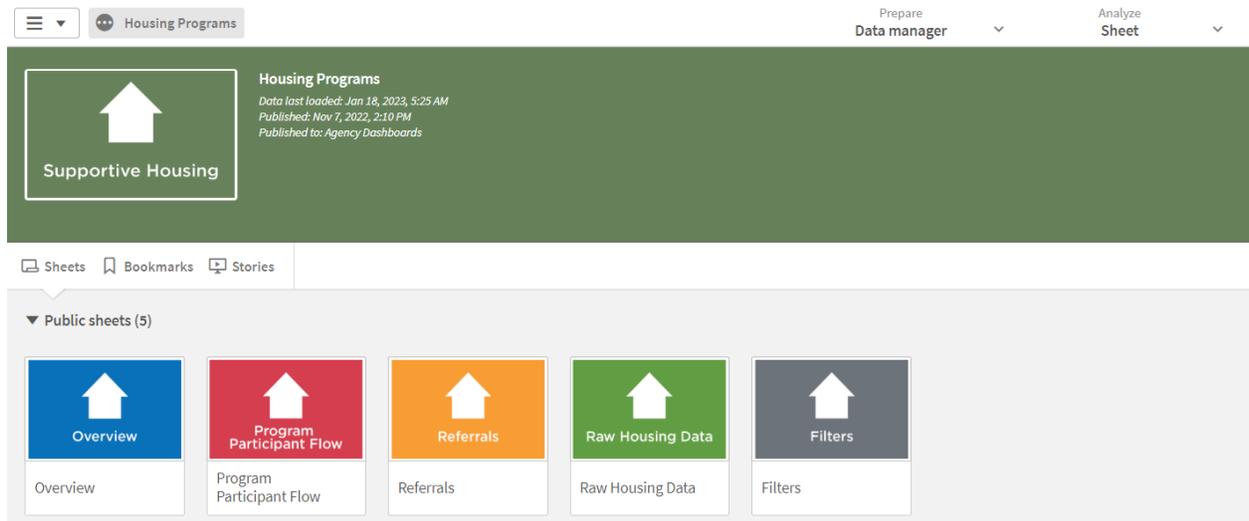
Press 'Open' to open the dashboard.



You will be directed to a landing page that lists multiple sheets that make up the dashboard:

- Overview
- Program Participant Flow
- Referrals
- Raw Housing Data
- Filters

Select the appropriate sheet required by pressing the graph icon.



The screenshot shows the QILK dashboard interface for 'Housing Programs'. At the top, there is a header with a menu icon, the title 'Housing Programs', and two dropdown menus for 'Prepare Data manager' and 'Analyze Sheet'. Below the header is a green banner with a white house icon and the text 'Supportive Housing'. To the right of the icon, it says 'Housing Programs' and provides metadata: 'Data last loaded: Jan 18, 2023, 5:25 AM', 'Published: Nov 7, 2022, 2:10 PM', and 'Published to: Agency Dashboards'. Below the banner are tabs for 'Sheets', 'Bookmarks', and 'Stories'. Under the 'Sheets' tab, there is a section for 'Public sheets (5)' containing five colored cards, each with a house icon and a title: 'Overview' (blue), 'Program Participant Flow' (red), 'Referrals' (orange), 'Raw Housing Data' (green), and 'Filters' (grey).

Topic 2: Overview Sheet

Key Data Points

This row outlines the high level or aggregate statistics of the Overview sheet:

Current categories of aggregate statistics include:

- Participants Housed
 - Number of participants currently housed by program(s). Defined as either the last assessment being an intake or the last answer to the question 'Are you currently housed?' being 'Yes'
- Entries Not Housed
 - Number of entries in the program that are not housed
- Entries in Program
 - Number of active entries in program
- Funded Program Spots
 - Number of funded program spots
- Open Program Spots
 - Number of spots in program(s) according to contract target subtracting number of participants in program (*# of total funded spots - # of active program participants*)
- Housed Occupancy
 - Percentage/value of active participants housed with program
- Program Occupancy
 - Percentage/value of funded program spots occupied
- Median Days in Program
 - Mid-point statistic based on range of days in program (50th percentile)
- Active Referrals
 - Referrals which are still 'In Progress' and have yet to be Accepted, Cancelled, or Declined

Important Note: the data within these aggregate categories will change depending on the Selection/filter applied.

Selection/Filter Column

On the left-hand side of the screen there are multiple selections, or filters, that may be applied to the data.

Housing Type:

The list of available selections/filters is dependent on the Agency, and may include one or all of the following options:

- Place Based
 - Apply this filter to look at data only for place-based programs
- Scattered Site
 - Apply this filter to look at data only for place-based programs

Program Name:

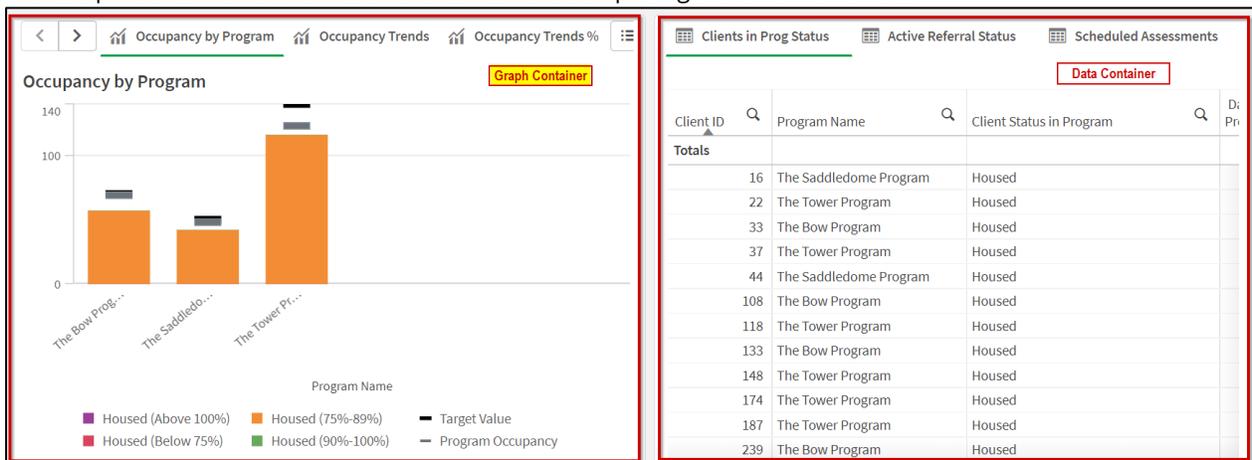
Each Agency will show a list of Programs (that use HMIS ServicePoint). Applying this selection/filter will manipulate the data to only show data for the selected program.

Sector Category:

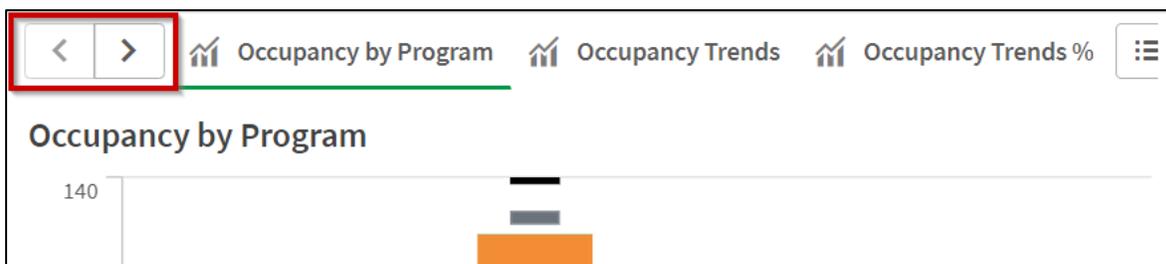
Each Agency will show a list of applicable sectors (based on its programs that use HMIS ServicePoint). Applying this selection/filter will manipulate the data to only show data for the selected sector.

1 of 2 Containers: Occupancy Graph(s)

The 'Graph Container' is the first of two containers comprising the Overview sheet:



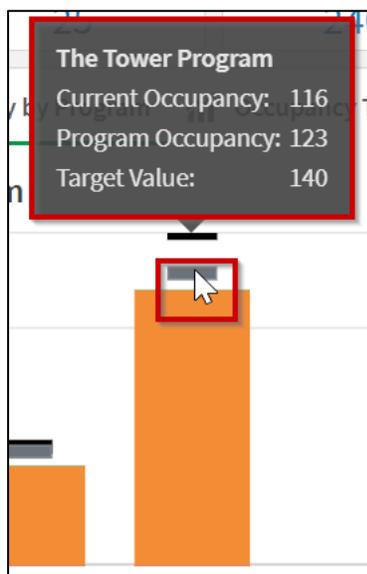
The Graph Container is comprised of multiple graphs which may be navigated through by pressing the arrow button(s) (if available), or by pressing title of each tab (graph/table) across the top of the container:



Included Graphs are:

Occupancy by Program:

- Will show each program's target occupancy, actual occupancy, and a percentage range toward achieving target occupancy
 - Graph is broken down by:
 - Housed (above 100%) – purple
 - Housed (below 75%) – pink
 - Housed (75% - 89%) – orange
 - Housed (90% - 100%) – green
 - Bold black line – shows Target
 - Grey line – shows current Program Occupancy
- Y axis (vertical) – number of program spots
- X axis (horizontal) – program
- You can hover over the bar to see exact metrics:



- You may also apply filters by clicking on data within the graphs to narrow down on that specific metric.

Occupancy Trends

- Show occupancy over time to be able to see upwards or downwards trends of housed participants vs program participants vs program contract.

Occupancy Trends %

- Trends of housed participants vs program participants vs program contract target
- Show occupancy over time as a percentage

Participants by Program Status

- Will show how many clients within each program are either:
 - 'housed' – green
 - 'previously moved-in, but not housed' – blue
 - 'not housed' – orange
- Y axis (vertical) – Number of participants
- X axis (horizontal) – program name
 - Each program within the agency will be represented by a bar
 - A total culmination of the agency will also be represented by a bar (with no title on the x-axis)

Open Program Spots

- Will show how many open spots are available within each program
- Y axis (vertical) – number of open program spots
- X axis (horizontal) – program

Age & Gender

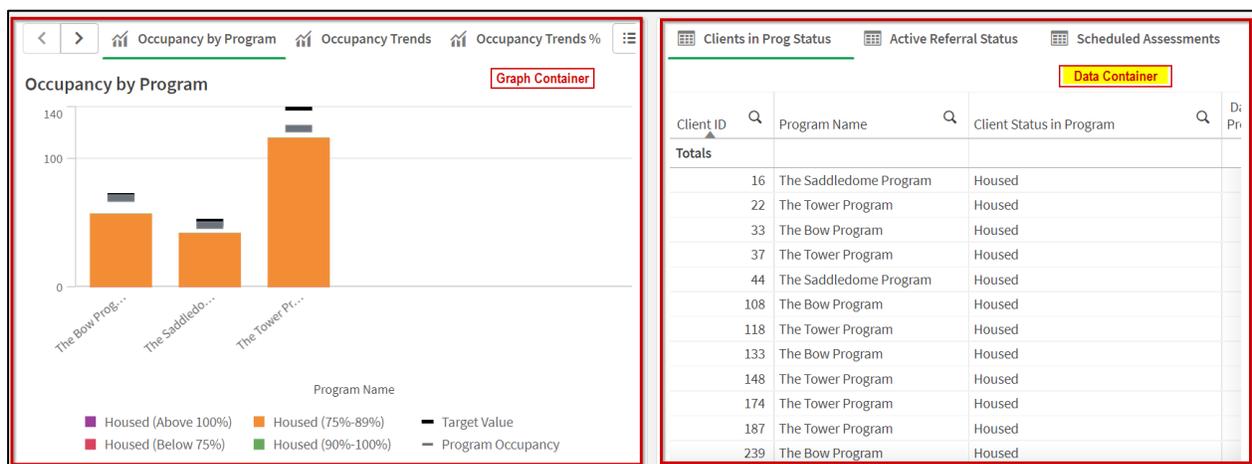
- Will show you how many individuals within each program are
 - Female – pink
 - Male – blue
 - Transgender – orange
 - Grey – unknown
- The y-axis (vertical) – number of entries in program
- The x-axis (horizontal) of the graph will indicate age ranges/groups

Ethnicity

- Will show how many individuals within each program are
 - Caucasian – blue
 - Indigenous – orange
 - Other – green
 - Unknown – grey
- The y-axis (vertical) – number of entries in program
- The x-axis (horizontal) – ethnicity

2 of 2 Containers: Data

The 'Data Container' is the second of two containers comprising the Overview sheet:



The Data Container is comprised of multiple tables which may be selected by pressing on the title:

Clients in Prog Status				Active Referral Status				Scheduled Assessments					
Client ID	Program Name	Client Status in Program	Days in Program	Entry Date	Move In Date	Last Assessment Date	Gender	Ethnicity	Current Age	Refer Date	Referral status	Referral outcome	Client ID
Totals													
16	The Saddledome Program	Housed											
22	The Tower Program	Housed											

Included Tables are:

Clients in Prog Status (Client Status in Program)

- Relates to 'Participants by Program Status' bar graph (in first container)
- Table data includes:
 - Client ID#
 - Program Name
 - Client Status in Program
 - Housed
 - Previous moved-in, but not housed
 - Not housed
 - Days in Program
 - Entry Date (*program entry from Entry/Exit Tab*)
 - Move In Date (*date of move in from HF Move-in Assessment*)
 - Last Assessment Date (last date recorded from applicable assessment (MI or QFU))
 - Gender (*from Client Demos*)
 - Ethnicity (*from Client Demos*)
 - Current Age (*from Client Demos*)
- There is a scroll bar at the bottom of the container (left to right)
- There is a scroll bar at the right of the container (up and down)
- You can apply filters to any of the columns by pressing magnifying glass

Active Referral Status

- Not related to a specific bar graph in the first container
- Table data includes:
 - Client ID #
 - Program Name
 - Refer Date
 - Referral status
 - Referral outcome
- You can apply filters to any of the columns by pressing magnifying glass

Scheduled Assessments

- Acts as a schedule to track which assessments are over/due, and coming up
- Table data includes:
 - Program Name
 - Client ID

- Next Assessment Due
- Month Assessment to be Completed
- Date of Previous Assessment
- Previous Assessment Type
- Legend:
 - Rows highlighted pink – overdue assessment

Topic 3: Program Participant Flow Sheet

Aggregate Row

Current categories of aggregate statistics include:

- Average Housed Occupancy
 - The average daily housed occupancy of the program(s) during the time period. Determined by the number of *housed participants* and the contract target.
- Average Entry Occupancy
 - The average daily program entry occupancy of the program(s) during the time period. Determined by the number of *entries into the program* and the contract target.
- Net Change – Housed Status
 - The difference in number of participants becoming housed and leaving housed by program in the time period.
- Net Change – Entry/Exits
 - The difference in the number of participants entering and exiting in the time period.
- Became Housed in Time Period
 - Number of participants who became housed during the time period. Defined as the participants either having an Intake assessment completed or answering 'Yes' to the question 'Are you currently housed/' when the previous answer was no.
- Left Housed by Program in Time Period
 - Either exited the program or had a change in the housing status within the program from previously being housed to no longer being housed.
- Entries in Time Period
 - Number of participants with entries in the time period.
- Exits in Time Period
 - Number of participants who exited from a program during the time period.

Important Note: the data within these aggregate categories will change depending on the Selection/filter applied.

Selection/Filter Column

On the left-hand side of the screen there are multiple selections, or filters, that may be applied to the data.

Fiscal Year Month:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Fiscal Quarter:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Date:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Program Name:

Each Agency will show a list of Programs (that use HMIS ServicePoint). Applying this selection/filter will manipulate the data to only show data for the selected program.

Housing Type:

The list of available selections/filters is dependent on the Agency, and may include one or all of the following options:

- Place Based
 - Apply this filter to look at data only for place-based programs
- Scattered Site
 - Apply this filter to look at data only for place-based programs

Sector Category:

Each Agency will show a list of applicable sectors (based on its programs that use HMIS ServicePoint). Applying this selection/filter will manipulate the data to only show data for the selected sector.

Exit Reason:

Filter by exit reason.

Exit Destination:

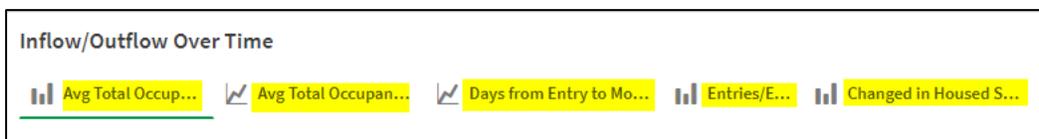
Filter by exit destination.

1st Container: Inflow/Outflow Over Time

The 'Inflow/Outflow Over Time Container' is the first of three containers comprising the Program Participant Flow sheet:



The Data Container is comprised of multiple graphs which may be selected by pressing on the title:



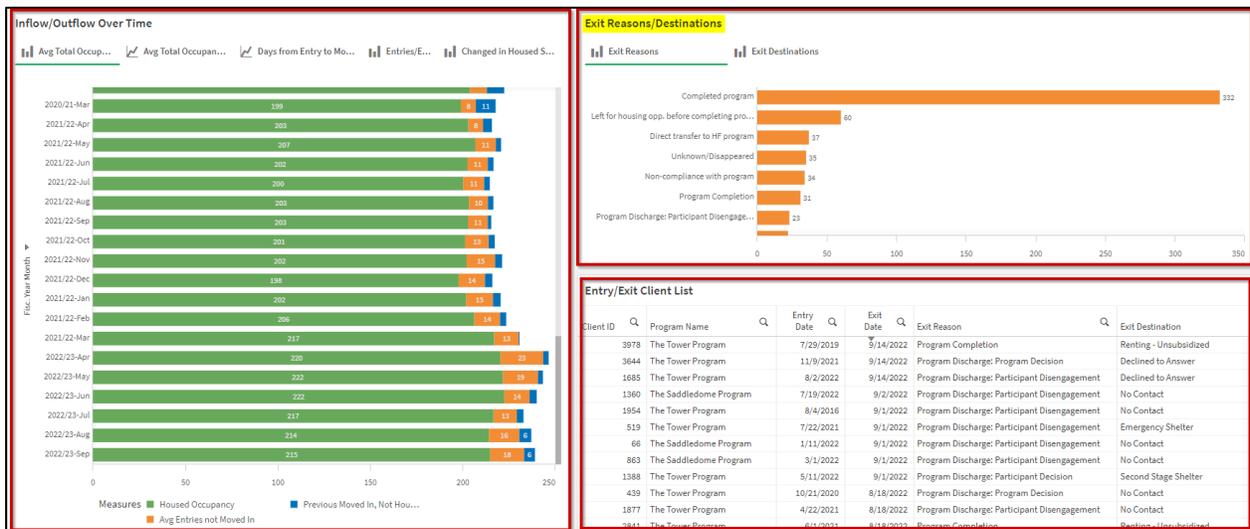
Included Graphs are:

- Average Total Occupancy
- Average Total Occupancy Over Time %
- Days from Entry to Move In
- Entries/Exits
- Changed in Housed Status

Each graph may be filtered by applying Selections from the Selections column, or by applying filters within the graphs themselves.

2nd Container: Exit Reasons/Destinations

The 'Exit Reasons/Destinations Container' is the second of three containers comprising the Program Participant Flow sheet:



Included Graphs are:

- Exit Reasons
- Exit Destinations

Each graph may be filtered by applying Selections from the Selections column, or by applying filters within the graphs themselves.

3rd Container: Entry/Exit Client List

The 'Entry/Exit Client List Container' is the third of three containers comprising the Program Participant Flow sheet:



- Only one table is listed and is comprised of:
 - Client ID
 - Program Name
 - Entry Date
 - Exit Date
 - Exit Reason
 - Exit Destination

Each table may be filtered by applying Selections from the Selections column, or by applying filters within the tables themselves.

Topic 4: Referrals Sheet

Aggregate Row

This row outlines the high level or aggregate statistics of the Referrals sheet:

Current categories of aggregate statistics include:

- Active Referrals
 - Referrals which are still 'In Progress' and have yet to be Accepted, Cancelled, or Declined
- Referrals in Time Period
 - Number of referrals made during the time period
- Accepted Referral %
 - Accepted referral percentage
- Client Not Eligible %
 - Client not eligible percentage
- Average Days from referral to Entry
 - Average number of days from when a participant's referral to the program became an entry
- Median Days from Referral to Entry

- Median number of days from when a participant's referral to the program became an entry

Important Note: the data within these aggregate categories will change depending on the Selection/filter applied.

Selection/Filter Column

On the left-hand side of the screen there are multiple selections, or filters, that may be applied to the data.

Fiscal Year:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Fiscal Quarter:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Month:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Date:

Select the expansion arrows for a detailed list of date and time ranges to filter by.

Housing Type:

The list of available selections/filters is dependent on the Agency, and may include one or all of the following options:

- Place Based
 - Apply this filter to look at data only for place-based programs
- Scattered Site
 - Apply this filter to look at data only for place-based programs

Program Name:

Filter by program.

Referral Status:

Filter by referral status.

Referral Outcome:

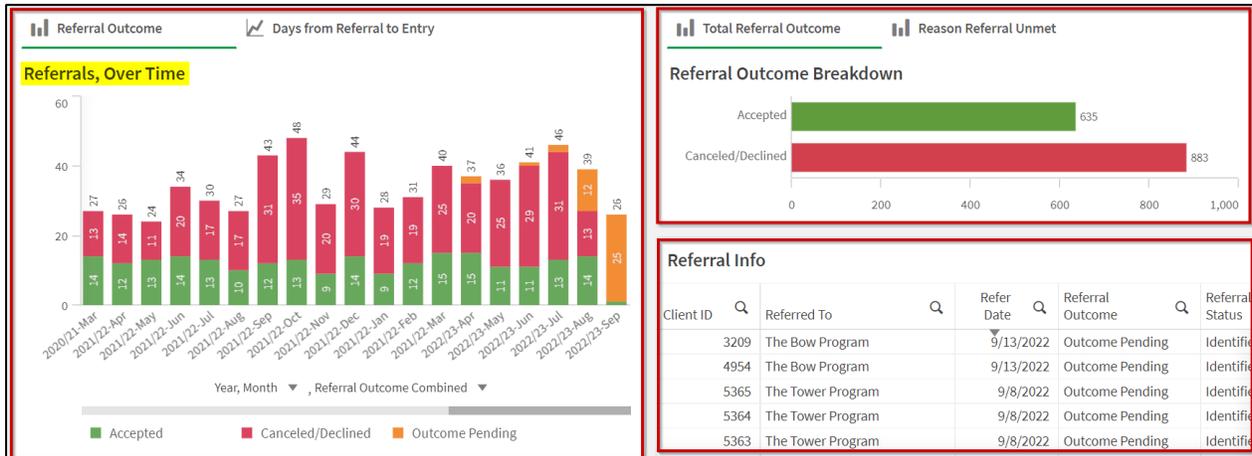
Filter by referral outcome.

Sector Category:

Filter by sector category (adult, family, youth).

1st Container: Referrals, Over Time

The 'Referrals, Over Time Container' is the first of three containers comprising the Referrals sheet:



The Referrals, Over Time Container is comprised of two graphs which may be selected by pressing on the title:



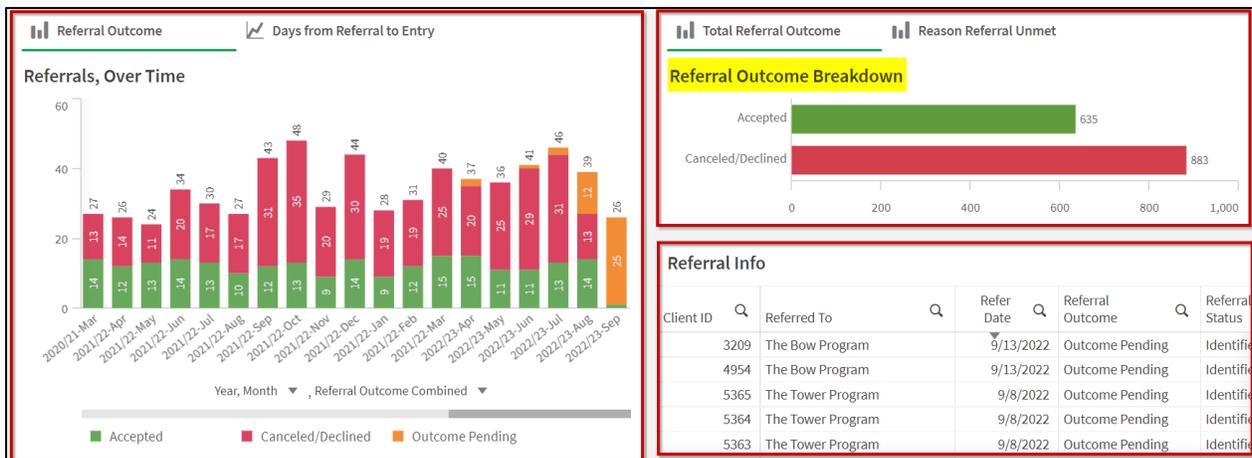
Included Graphs are:

- Referral Outcome
- Days from Referral to Entry

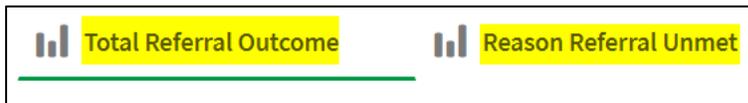
Each graph may be filtered by applying Selections from the Selections column, or by applying filters within the graphs themselves.

2nd Container: Referral Outcome Breakdown

The 'Referral Outcome Breakdown Container' is the second of three containers comprising the Referrals sheet:



The Referral Outcome Breakdown is comprised of two graphs which may be selected by pressing on the title:



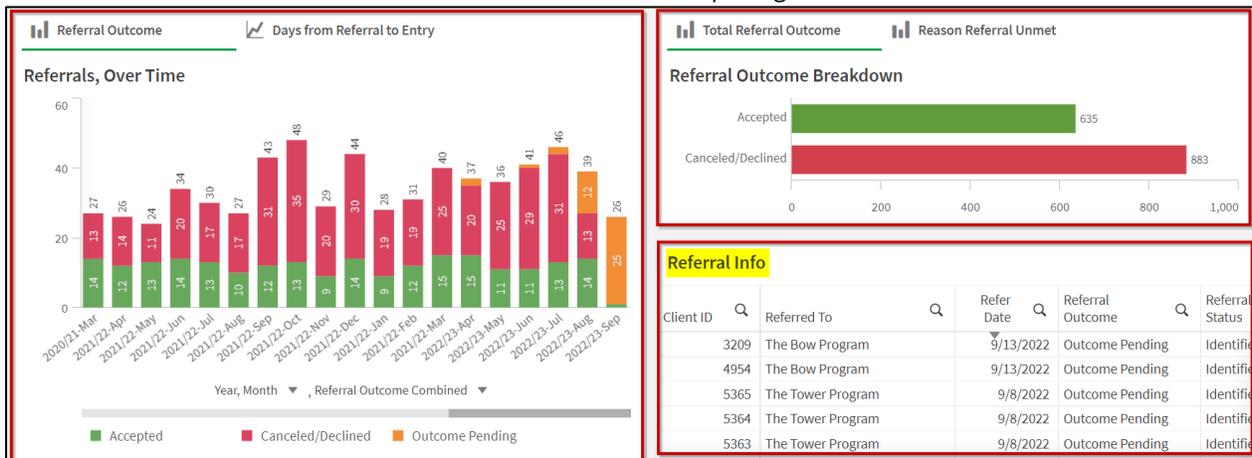
Included Graphs are:

- Total Referral Outcome
- Reason Referral Unmet

Each graph may be filtered by applying Selections from the Selections column, or by applying filters within the graphs themselves.

3rd Container: Referral Info

The 'Referral Info Container' is the third of three containers comprising the Referrals sheet:



Only one table is listed and is comprised of:

- Client ID
- Referred To
- Refer Date
- Referral Status
- Program Entry Date
- Reason Referral Unmet

Each table may be filtered by applying Selections from the Selections column, or by applying filters within the tables themselves.

Topic 5: Raw Housing Data

Summary: this sheet is comprised of the raw data entered in HMIS ServicePoint and exported into Qlik. There is no aggregate row of statistics or containers. This is simply the raw data.

Selection/Filter Column

On the left-hand side of the screen there are multiple selections, or filters, that may be used to filter the raw data:

- Program Name
- Exit Date, Month
- Entry Date, Fiscal Year
- Entry Date, Fiscal Quarter
- Entry Date, Month
- Exit Date, Fiscal Year
- Exit Date, Fiscal Quarter
- Assessment Date, Fiscal Year
- Assessment Date, Fiscal Quarter
- Assessment Date, Fiscal Month

Topic 6: Filters Sheet

The filter sheet brings all the filters found throughout the dashboard into one central place. This sheet enables a user to answer specific questions and have the answers displayed across all sheets. The filters that have been placed on the left-hand side of the sheets have been selected for their relevance to the sheet they are displayed on. However, this does not mean there are not filters on one sheet that could be useful on another.

If a user is looking to answer a specific question or see a breakdown of a very specific subset of their program(s) data, then by applying the filters here they are able to work back through the dashboard seeing information that is specific to the applied filters.