**Example: Data Collection, Management, and Entry Process**

This example of data processes defines the procedures implemented to ensure the integrity of homelessness and outreach data. The process assumes that outreach workers are using paper forms that are data entered into your communities’ Homelessness Management Information System or HMIS. The draft procedure highlights the categories: training and education, data collection, management logs, data entry, agency submission of contact sheets, tracking the submission of contact sheets, agency submission schedule, and reporting.

For communities using an electronic submission process a similar ‘data quality’ activity will need to be developed and defined that matches the needs of your community.

**1. Training and Education**

Outreach Supervisors will attend a one day training focusing on:

* Accurate completion of the contact form by Outreach Workers;
* How to review/correct completed contact forms;
* Submission timeline for contact forms.

**2. Data Collection**

Outreach Supervisors will submit contact sheets for the prior week on a weekly basis. Contact sheets must be reviewed and corrected prior to submission. A Data Analyst will review the forms to confirm they are ready for data to be entered. Forms with incomplete or conflicting information will be returned to the agency on the date of their next submission. Forms determined ready for data entry will be forwarded to Data Support to be entered into the database.

An Outreach Log will be established to monitor data submission and data entry. The Outreach Log will be used to track:

* When contact forms are submitted by each agency
* How many forms were submitted by each agency
* When the data is entered

*Example Log*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | *Date Submitted* | *Number of Forms Submitted* | *Submitted By:* | *Received By:* | *Date Data Entered* | *Number of Forms Returned* |
| Agency 1 |  |  |  |  |  |  |
| Agency 2 |  |  |  |  |  |  |
| Agency 3 |  |  |  |  |  |  |
| Agency 4 |  |  |  |  |  |  |

Forms that have been data entered will be kept on site for one year. After a year the forms will be archived.

**3. Data Entry**

Forms determined ready for data entry by the Data Analyst will be data entered within 7 business days (of receipt). It is the expectation that all data for the previous month be data entered by 10th of every month.

**4. Agency Submission of Contact Sheets**

* Outreach Worker/Case Manager (Worker) submit contact sheets to their supervisor
* Agency supervisors review each contact sheet for the following errors
	+ All required fields are completed
	+ Information in companion fields is valid and consistent
	+ All written information is legible and decipherable
* Agency supervisors highlight errors and return contact sheet(s) to Outreach Worker/Case Manager (Worker) to be corrected and resubmitted.
* Agency supervisors review resubmitted contact sheet(s) to confirm corrections were done accurately
* Agency supervisors submit error free contact sheets to xxx address

**5. Tracking Agency Contact Sheet Submission**

* Prior to submission agency supervisors count the number of contact sheets to be submitted.
* Upon submission, staff confirms the number of contact sheets received from the agency supervisor.
* The number of contact sheets submitted to and received is documented and the agency supervisor signs and dates the Agency Contact Sheet Submission Form.
* Staff review contact sheets received for the following errors
	+ All required fields are completed
	+ Information in companion fields is valid and consistent
	+ All written information is legible and decipherable
* Staff will return contact sheets with errors to agency supervisors on their next visit to submit contact sheets.
* Staff will document the number of contact sheets returned to the agency supervisor on the Agency Contact Sheet Submission Form for the batch of contact sheets the returned sheets originated.

Note: Contact sheets returned to agency supervisors may or may not be resubmitted. When they are resubmitted the agency supervisor just includes them in the number of contact sheets submitted during that submission.

**6. Agency Submission Schedule**

* All agencies must submit their contact sheets for the prior week (and any contact sheets returned) each Monday afternoon between 1:00 pm and 4:00 pm.

**7. Reporting**

Monthly summary reports will be forward to all interested parties, as determined by the leadership of the Outreach Coordination Entity (OCE), on the 15th day of each month.