



CITY OF BOSTON

ANNUAL HOMELESS CENSUS

POINT IN TIME SURVEY

INSTRUCTIONS

January 27, 2016

Before you start...

1. Log into your HMIS and change into the appropriate program
2. Be sure that all Program Touchpoints are completed!! This information is needed for the Housing Inventory portion of the Census.

The screenshot shows the ETO software interface. At the top, there's a header with 'ETO™ software' and a user welcome message 'Welcome Kadra Adderly'. Below this is a navigation bar with tabs: Home, New, Quick Search, To Do List, Messages, My Favorites, My Dashboard, Reporting Dashboard, and Marketplace. A search bar is present with the text 'Enter Search Term(s) within Participant in CH - St. Peter's'. The main content area is titled 'Review TouchPoints' and 'Review TouchPoints for CH - St. Peter's'. It contains a form with a 'Name' field, a 'Take New' button, and three expandable sections: 'Bed and Unit Inventory Information', 'Project Descriptor Data Elements', and 'Site Information'. A 'Take New TouchPoint' button is at the bottom. A sidebar on the right lists various menu items: Participants, Participant History, Record Efforts, My Work, Contacts, Entities, Scheduling, Collections, TouchPoints (expanded), Record TouchPoints, View Anonymous TouchPoints, View Collections TouchPoints, View Entity TouchPoints, View Family TouchPoints, and View General TouchPoints.

- Site Information – This is the physical location of the program, if it's scattered site, indicate here. The Geocode for Boston is 250282
- Project Descriptor Data Elements – all questions should be completed as there are options for N/A
 - CoC Code for Boston is MA-500
 - Start and End Dates should correspond to the funding timeline for this program. If N/A then use calendar year of January through December
 - For Emergency Shelters you **must** complete the Tracking Method, otherwise your data will not be accurate.
- Bed and Unit Inventory Information – all questions should be completed, even if it's zero.
 - Units and Beds are always an issue. On the individual side, the beds and units should match. For families, the unit should be the number of "rooms" available and the beds are the number of people who could be in those rooms. Example: 1 unit has a twin bed and bunk beds and unit 2 has a double bed and crib. The units are 2 and the beds are 6, 3 in unit 1 and 3 in unit 2.
 - The inventory start and end dates should match the dates in the Project Descriptor touchpoint.

Basic Information

❖ How to “Add New Participant(s)”:

The screenshot shows the ETO software interface. At the top, there's a navigation bar with links like Home, New, Quick Search, To Do List, Messages, My Favorites, My Dashboard, and Rep. Below this is a search bar with the text "Enter Search Term(s)" and a dropdown menu set to "Participant". The main content area is titled "Program Enrollment" and includes a checkbox for "Enroll in Program:" and a "Program Start Date" field set to "1/20/2016". Below this is the "Add New Participant" section, which contains fields for Case Number, Prefix, First Name, Middle Name, Last Name, Suffix, Name Data Quality (HUD), and a Photo upload button. A red box highlights the "Add New Participant" section, with an arrow pointing to the "Add New Participant" link in the right-hand sidebar. Another red box highlights the "Program Start Date" field, with an arrow pointing to the "Add New Participant" link in the sidebar. A third red box highlights the "Add New Participant" link in the sidebar, with an arrow pointing to the "Add New Participant" link in the sidebar.

Step 1: Click on Add New Participant the enrollment date and demographic information.

Step 2: Enter date and complete demographics. Please note that this is just a portion of the page.

❖ How to “Record Touchpoint(s)”:

The screenshot shows the ETO software interface. At the top, there's a navigation bar with links like Home, New, Quick Search, To Do List, Messages, My Favorites, My Dashboard, Reporting Dashboard, and Marketplace. Below this is a search bar with the text "Enter Search Term(s)". The main content area is titled "Record TouchPoint" and includes a "Select TouchPoint:" dropdown menu. A red box highlights the "Select TouchPoint:" dropdown menu, with an arrow pointing to the "HUD Assessment (Entry/Update/Annual/Exit)" option. Another red box highlights the "Record TouchPoints" link in the right-hand sidebar, with an arrow pointing to the "Record TouchPoints" link in the sidebar. A third red box highlights the "Record TouchPoints" link in the sidebar, with an arrow pointing to the "Record TouchPoints" link in the sidebar.

Step 1: Click on Record Touchpoints

Step 2: Select HUD Assessment then complete touchpoint

Basic Information

❖ How to add clients to the Bed Register:

Step 2: Click on “add participant to 1” to register to a bed 1. Continue these steps for the others.

Step 1: Click on “Housing Check-in” to access the bed register

		Participant	Case #	DOB	Sex	Notes	Take Action
1	Add Participant to 1	N/A					Manage
2	Add Participant to 2	N/A					Manage
3	Add Participant to 3	N/A					Manage
4	Add Participant to 4	N/A					Manage
5	Add Participant to 5	N/A					Manage
6	Add Participant to 6	N/A					Manage
7	Add Participant to 7	N/A					Manage
8	Add Participant to 8	N/A					Manage
9	Add Participant to 9	N/A					Manage
10	Add Participant to 10	N/A					Manage
11	Add Participant to 11	N/A					Manage
12	Add Participant to 12	N/A					Manage

- Record Efforts
 - Self Assessment
 - Participant Efforts
 - Record Attendance
 - Record Hours of Attendance
 - Hrs of Attendance Alternate
 - Multiple Participant Efforts
 - Add Referral
 - Multiple Participant Referrals
 - View/Edit Referrals
 - View Pending Referrals
 - View Multi-Attendance
 - General Assessments
 - General Efforts
 - Housing Check-In
 - Housing Check-Out
 - Manage Rooms

ETO Reports

Manage Data Pulls

ETO™ software Boston HMIS Admin: 2009 HMIS Template Master Program Welcome Kadra Adderly

Home New Quick Search To Do List Messages My Favorites My Dashboard Reporting Dashboard Marketplace

Enter Search Term(s) within Participant in 2009 HMIS Template Master Program Search

Manage HMIS Data Pulls

Create Data Pull Run Validation Manage HMIS Data Validations Go To Reporting Site

Export ID Description Requested On Re

Step 2: Click on create data pull then input the required information. **PLEASE MAKE USE 1/27/2016 TO 1/27/2016 FOR THE CENSUS DATES**

ETO™ software Master Program Welcome Kadra Adderly

Home New Quick Search To Do List Messages My Favorites My Dashboard Reporting Dashboard Marketplace

Enter Search Term(s) within Participant in 2009 HMIS Template Master Program Search

Create HMIS Data Pull

Please select the HUD version, scope, a date range, the files types you would like included and notification options. You may also elect to have this data pull automatically refreshed based off of a schedule.

HUD Version: 2014 (3.04 csv) Scope: This Program

Grant Start Date: 1/1/2014 Grant End Date: 12/31/2014

Include Readable CSV's: ☐ Include XML file: ☐ Notify upon completion: ☐ Refresh automatically: ☐

Cancel Submit

Step 3: Click "submit" to run the data pull

Step 1: Click on Manage HMIS Data Pulls

- Participants
- Participant History
- Record Efforts
- My Work
- Contacts
- Entities
- Scheduling
- Collections
- TouchPoints
- Reports
 - Assessment Reports
 - Assessment/Survey Flat File
 - Custom Reports
 - Demographics Reports
 - Effort Qualifier Reports
 - Employment Retention
 - Entity Reports
 - ETOBBarcode Reports
 - ETO Results
 - Housing Reports
 - Legal Reports
 - Manage HMIS Data Pulls
 - Manage HMIS Data Validations

Home New Quick Search To Do List Messages My Favorites My Dashboard Reporting Dashboard Marketplace

Enter Search Term(s) within Participant in 2009 HMIS Template Master Program Search

HMIS Data Pulls

Data Pull Run Validation Manage HMIS Data Validations Go To Reporting Site

Report ID	Description	Version	Hash Status	Included	Requested On	Requeste	Completed	Take Action
1345	2009 HMIS Template Master Program, 1/1/2014 - 12/31/2014	2014 (3.04 csv)	Unhashed (Standard CSV)			Adderly		Open Download Reporting Delete
1344	2009 HMIS Template Master Program, 1/1/2014 - 12/31/2014	2014 (3.04 csv)	Unhashed (Standard CSV)			Adderly	12/30/2015	Open Download Reporting Delete

Step 4: Click on Reporting to send data to the reporting site

File successfully sent for reporting. Close Go To Reporting Site

Agency Dash Reports

Missing Data Report

Step 1: Find the Missing Data Report

Step 2: Enter report parameters here

AgencyDash3

Logged in As: [User] Addressly [LOGOUT]

Missing Data Report

SimtechSolutions, inc.

Organization: Boston Healthcare for the Homeless
 From: 01/01/2015
 To: 12/31/2015
 Program: Family
 Created On: 12/31/2015
 Created By:

Key
 X = Don't Know / Refused
 O = Missing Element

#	Last Name	First Name	SSN	Date of Birth	Race	Ethnicity	Gender	Veteran Status	Disabling Condition	Prior Residence	Prior Zip	Housing Status-Entry	Destination
1									O			O	
2					X							O	
3					X							O	
4									O			O	
5												O	
6					X							O	
7									O			O	
8												O	
9					X							O	
10									O			O	
11												O	
12									O			O	
13									O			O	
14												O	
15									O			O	
16									O			O	
17					X				O			O	

Download PDF Include Cover Page

Save Settings Reset Form Generate Report

AgencyDash Ready

Contact Simtech Support Products by Simtech Solutions

Step 3: Click here to generate missing data report

Step 4: Click here to download missing data report shown above

Note: If any changes are needed, please make sure you go back to ETO to fix data and re-run a new data pull.

Agency Dash Reports

**Step 1: Find the PIT-
Project Level Report**

Point In Time Reports - Project Level Report

Step 2: Enter report parameters here

Step 3: Generate Project Level Report here

Point In Time Project Level Report

CoC: MA-500 Boston
Organization: Boston Healthcare for the Homeless
Project: Family
P.I.T. Date: 12/31/2015
Run By: Adderly, Kadra
Dataset: Export ID 1348 2015-12-31

Households with at least 1 adult and 1 child

Household Composition

Total Number of Households	65
Total Number of Persons	154
Persons under age 18	88
Persons aged 18-24	19
Persons over age 24	47

Gender (adults and children)

Female	112
Male	42
Transgender, Male to Female	0
Transgender, Female to Male	0

Ethnicity (adults and children)

Non-Hispanic/Non-Latino	85
Hispanic/Latino	69

Race

White	37
Black or African American	68
Asian	7
American Indian or Alaska Native	6
Native Hawaiian or Other Pacific Islander	1

Note: Check Data Quality here: SEE NEXT PAGE FOR DETAILED INFORMATION

White

White	7
Black or African American	6
Asian	0
American Indian or Alaska Native	1
Native Hawaiian or Other Pacific Islander	0
Multiple Races	0

Homeless Subpopulations

Chronically Homeless Individuals

Chronically Homeless Individuals	0
Chronically Homeless Families	0
Persons in Chronically Homeless Families	0
Chronically Homeless Veteran Individuals	0
Chronically Homeless Veteran Families	0
Persons in Chronically Homeless Veteran Families	0

Adults with a Serious Mental Illness

Adults with a Serious Mental Illness	7
Adults with a Substance Use Disorder	1
Adults with HIV/AIDS	0
Victims of Domestic Violence	20

Data Quality Checks

Persons Missing Relationship to Head of Household	0
Persons Missing Date of Birth	0
Persons Missing Chronic Homeless Status	2

Generated by AgencyDash.com on 01/04/2016 at 11:22 AM

Step 4: Click here to download PIT - Project Level Report. See next page for details of this report.

Note: Client information with missing data elements

Note: Click here to export to excel

Applications

- Dashboard
 - Applications
 - Agencies
 - CHOMPS
- Reporting
 - Daily Census Reports
 - Data Quality Reports
 - AHAR Readiness Report
 - Overlapping Episodes R
 - Data Quality Scorecard
 - Data Quality Summary R
 - Missing Data Report
 - Chronic Audit
 - HUD Performance Measure
 - HUD Reports
 - Housing Prioritization Lis
 - LOS & Recidivism Repor
 - APR (Annual Performanc
 - AHAR
 - NOFA (Notice of Funding
 - HMIS APR

Select Report Parameters

Report: Project Level Report

PIT Date: 12/31/2015

Import Definition: HUD CSV Spec v3.04

Import File: Export ID 1348 2015-12-31

Organization: Boston Healthcare for the Homeless

Program: Family

CoC: MA-500 Boston

Clients

Back to Report

	PID	LegalFir...	LegalLa...	DateOf...	Primary...	Secor
1	40CD2...			04/22/1...	3	
2	F031B2...			12/06/1...	5	

Page 1 of 1

Displaying 1 - 2 of 2

Download PDF

Include Cover Page

Contact Simtech Support

Products by Simtech Solutions

Save Settings

Reset Form

Generate Report

AgencyDash Ready

Note: Click here to download client information with missing data elements

Agency Dash Reports

Point In Time Reports - Housing Inventory Chart

Step 1: Locate the Housing Inventory Chart Report

Step 2: Select report parameters here

Housing Inventory Chart

CoC Name: MA-500 Boston
 Ran By: Kadra Adderly
 Import File Name: [blank]
 Data Uploaded: [blank]

PSH Permanent Supportive Housing (PSH) Housing Inventory Available on or before

Provider Name	Facility Name	Target Population		Year-Round Beds				Beds in HMIS			See
		A	B	Family Units	Family	Ind	Total	Ind	Family	Total	
Pine Street Inn	CH - St. Peter's	-	-	0	0	31	31	31	0	31	(
Subtotals				0	0	31	31	31	0	31	(

Navigation Tree (Left Sidebar):

- Applications
 - Dashboard
 - Applications
 - Agencies
 - CHOMPS
- Reporting
 - Daily Census Reports
 - Data Quality Reports
 - AHAR Readiness Report
 - Overlapping Episodes Repo
 - Data Quality Scorecard
 - Data Quality Summary Rep
 - Missing Data Report
 - Chronic Audit
 - HUD Performance Measures
 - Housing Prioritization List
 - LOS & Recidivism Report
 - HUD Reports
 - APR (Annual Performance R
 - AHAR
 - NOFA (Notice of Funding an
 - HMIS APR
 - Point In Time Reports
 - Project Level Report
 - Summary Report
 - Trend Report
 - Housing Inventory Chart** (marked with a red star)
- Tools
 - Data Import Tool
 - Report Manager
 - Point In Time Grid
 - User Settings

Select Report Parameters (Center Panel):

Report: Housing Inventory Chart
 PIT Date: 12/31/2015
 Import Definition: HUD CSV Spec v3.04
 Import File: Export ID 1350 2016-01-04
 CoC: MA-500 Boston

Buttons (Bottom): Remove, Save Settings, Reset Form, Generate Report, Download PDF, Include Cover Page

Step 3: Click here to generate your Housing Inventory Report

Step 4: Click here to download your Housing Inventory Chart Report

ETO Reports

Instructions on Retrieving CSV Files

Home New Quick Search To Do List Messages My Favorites My Dashboard Reporting Dashboard Marketplace

Enter Search Term(s) within Participant in CH - St. Peter's Search

Manage HMIS Data Pulls

Create Data Pull Run Validation Manage HMIS Data Validations Go To Reporting Site

Export ID	Description	Version	Hash Status	Included	Requested On	Requested By	Refresh automatically?	Date Completed	Take Action
1350	CH - St. Peter's Program, 1/1/2015 - 12/31/2015	2014 (3.04 csv)	Unhashed (Standard CSV)	Non-Readable CSV	1/4/2016 1:37:29	Kadra Adderly	☐	1/4/2016	Open Download Reporting Delete
1343	PSI MI WI Program Group, 12/20/2015 - 12/20/2015	2014 (4.1 csv)	Unhashed (Standard CSV)			Chifer Flynn		12/30/2015	Open Download Reporting Delete
1339	Mens Inn Program, 12/20/2015 - 12/20/2015	2014 (3.04 csv)	Unhashed (Standard CSV)	Non-Readable CSV				12/29/2015	Open Download Reporting Delete
1331	Womens Inn - Emergency Program, 12/20/2015 - 12/20/2015	2014 (3.04 csv)	Unhashed (Standard CSV)	Non-Readable CSV	12/22/2015 4:06:03 PM	Jennifer Flynn		12/22/2015	Open Download Reporting Delete

Please wait while your file is prepared. You can close this window once the download is complete.

Step 1: Click here to download your CSV files

Step 2: Click here to save your CSV files

Do you want to open or save archive-2016-Jan-04-161522-1350.zip (11.4 KB) from secure.etosoftware.com?

[Open](#) [Save](#) [Cancel](#)

Step 3: Highlight all CSV files, click extract all files then final click on extract.

Content.IE5 > SNK7QORI > archive-2016-Jan-04-161522-1350

Organize **Extract all files**

Name	Type	Compressed size	Password ...	Size
AgencyProgram	Microsoft Excel Comma S...	1 KB	No	
ArizonaMatrix	Microsoft Excel Comma S...	1 KB	No	
BedInventory	Microsoft Excel Comma S...	1 KB	No	
Client	Microsoft Excel Comma S...	3 KB	No	
Client-Historical	Microsoft Excel Comma S...	3 KB	No	
Export	Microsoft Excel Comma S...	1 KB	No	
IncomeBenefits	Microsoft Excel Comma S...	3 KB	No	
ProgramParticipation	Microsoft Excel Comma S...	2 KB	No	
ServiceEvent	Microsoft Excel Comma S...	1 KB	No	
SiteInformation	Microsoft Excel Comma S...	1 KB	No	

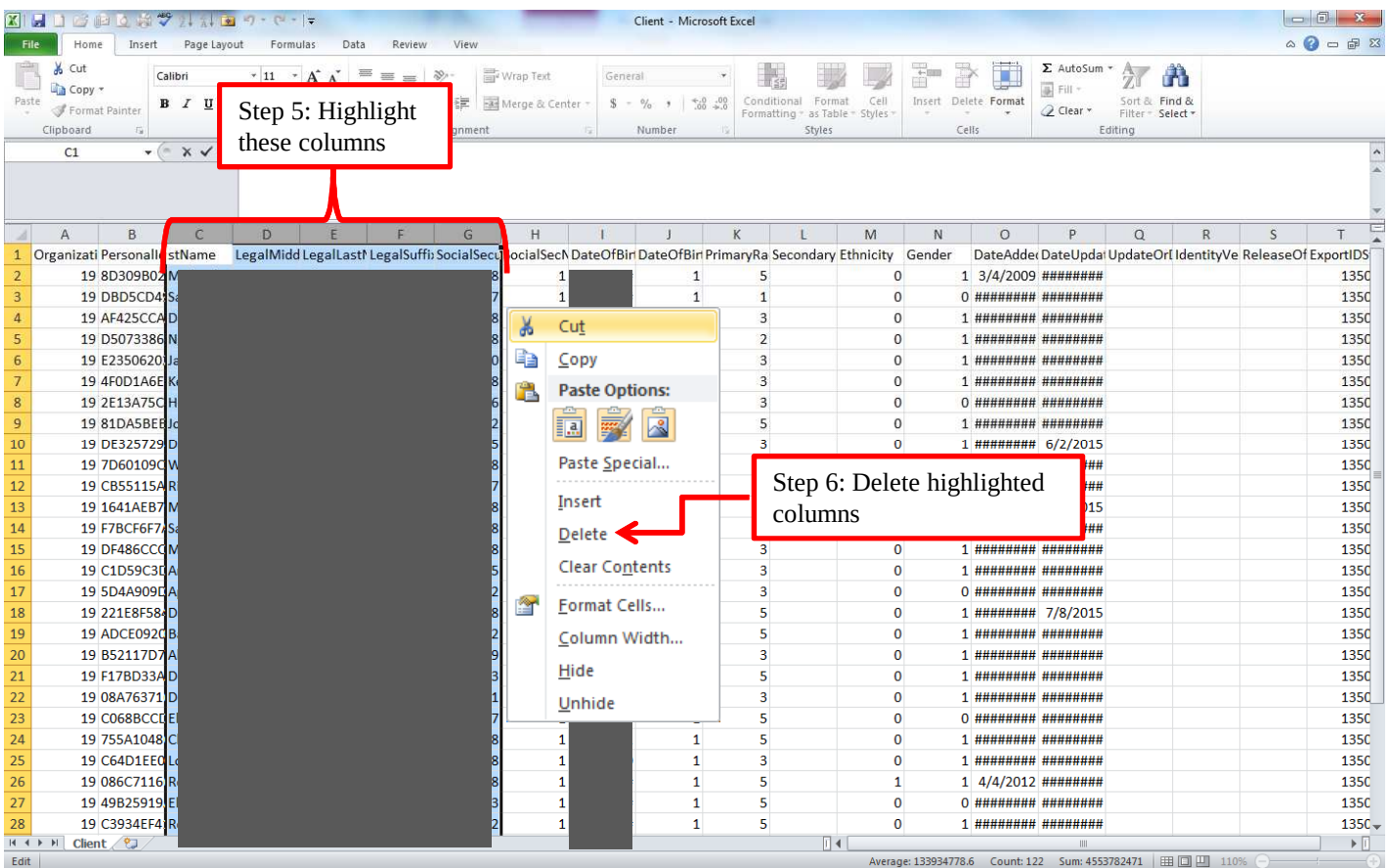
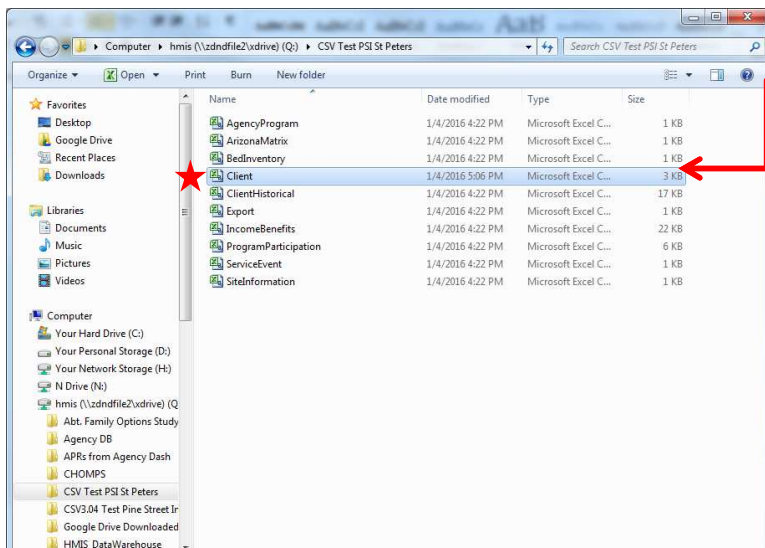
Select a Destination and Extract Files

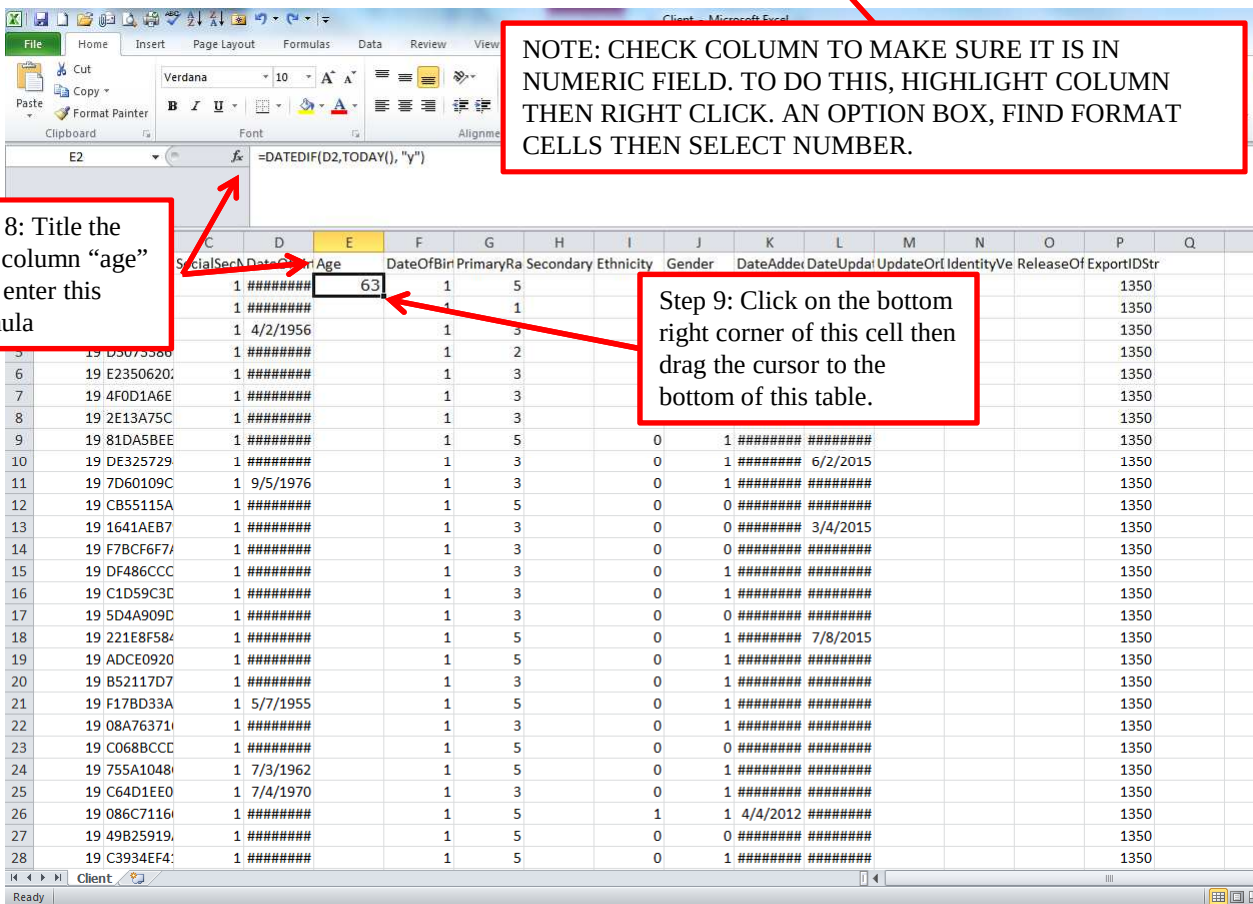
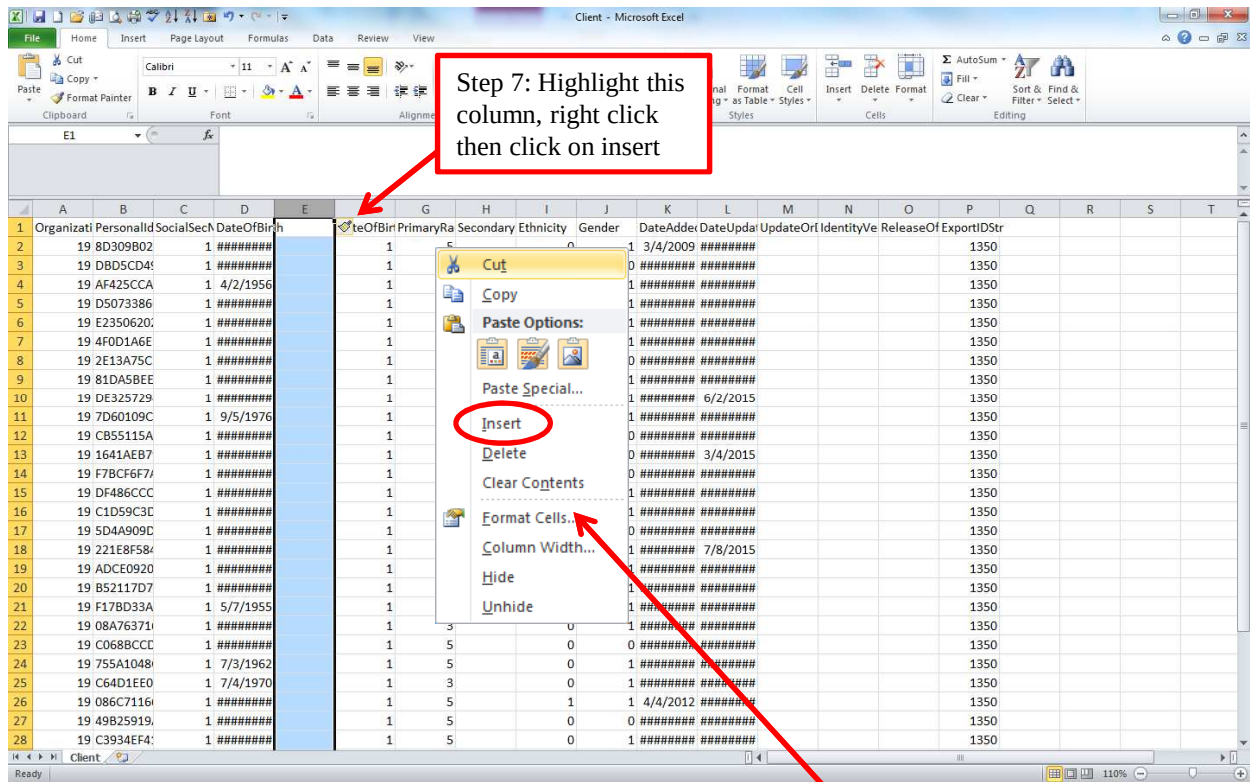
Files will be extracted to this folder: C:\Users\kadderly\Documents\archive-2016-Jan-04-161522-1350

☒ Show extracted files when complete.

Extract Cancel

Ratio: (multiple values) Type: Microsoft Excel Comma Separated Valu...
Date modified: 1/4/2016 1:37 PM





Client - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

Step 10: Highlight age column, click copy then highlight again to paste numbers without formula

Step 11: Delete date of birth Column

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Organizati	PersonalId	SocialSec	DateOfBir	Age	DateOfBir	PrimaryRa	Secondary	Ethnicity	Gender	DateAdd	DateUpda	Und
1	19 8D309802	1	63								1 3/4/2009	#####	
2	19 DBD5CD4	1	36								0 #####	#####	
3	19 AF425CCA	1	59								1 #####	#####	
4	19 D5073386	1	56								1 #####	#####	
5	19 E2350620	1	70								1 #####	#####	
6	19 4F0D1A6E	1	60								1 #####	#####	
7	19 2E13A75C	1	50								1 #####	#####	
8	19 81DA5BEE	1	53								1 #####	#####	
9	19 DE325729	1	47								1 #####	6/2/2015	
10	19 7D60109C	1	39								1 #####	#####	
11	19 CB55115A	1	46								1 #####	#####	
12	19 1641AEB7	1	60								0 #####	3/4/2015	
13	19 F7BCF6F7	1	61								1 #####	#####	
14	19 DF486CCC	1	36								1 #####	#####	
15	19 C1D59C3C	1	70								1 #####	#####	
16	19 5D4A909D	1	41								0 #####	#####	
17	19 221E8F58	1	56								1 #####	7/8/2015	
18	19 ADCE0920	1	63								1 #####	#####	
19	19 B52117D7	1	66								1 #####	#####	
20	19 F17BD33A	1	60								1 #####	#####	
21	19 08A76371	1	59								1 #####	#####	
22	19 C068BCCC	1	55								0 #####	#####	
23	19 755A1048	1	53								1 #####	#####	
24	19 C64D1EE0	1	45								1 #####	#####	
25	19 086C7116	1	38								1 4/4/2012	#####	
26	19 49B25919	1	59								0 #####	#####	
27	19 C3934EF4	1	60								1 #####	#####	
28													

Average: 54.94117647 Count: 35 Sum: 1868 110%

Client - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

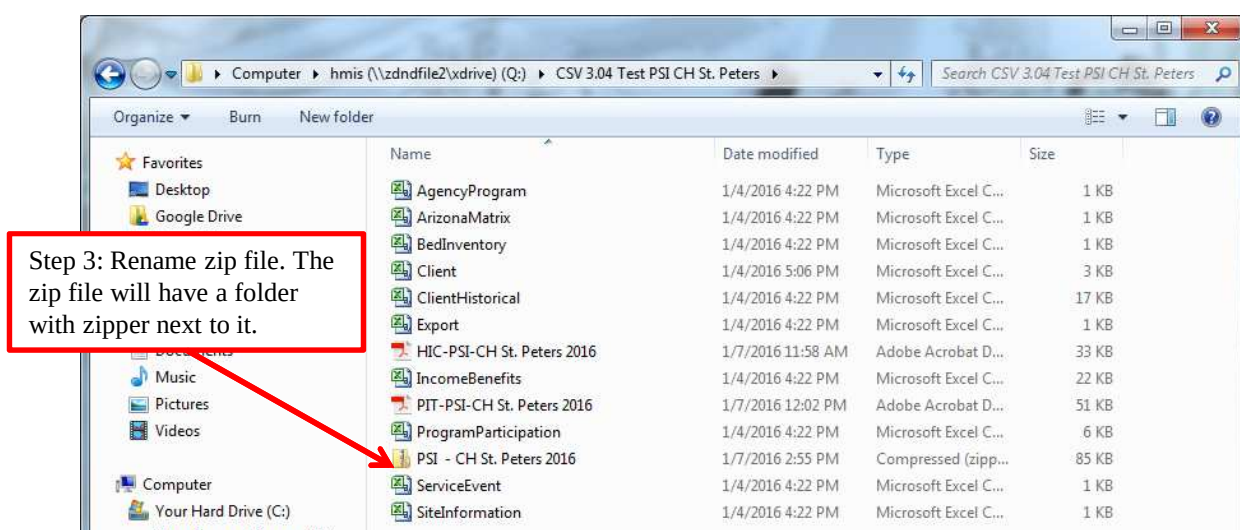
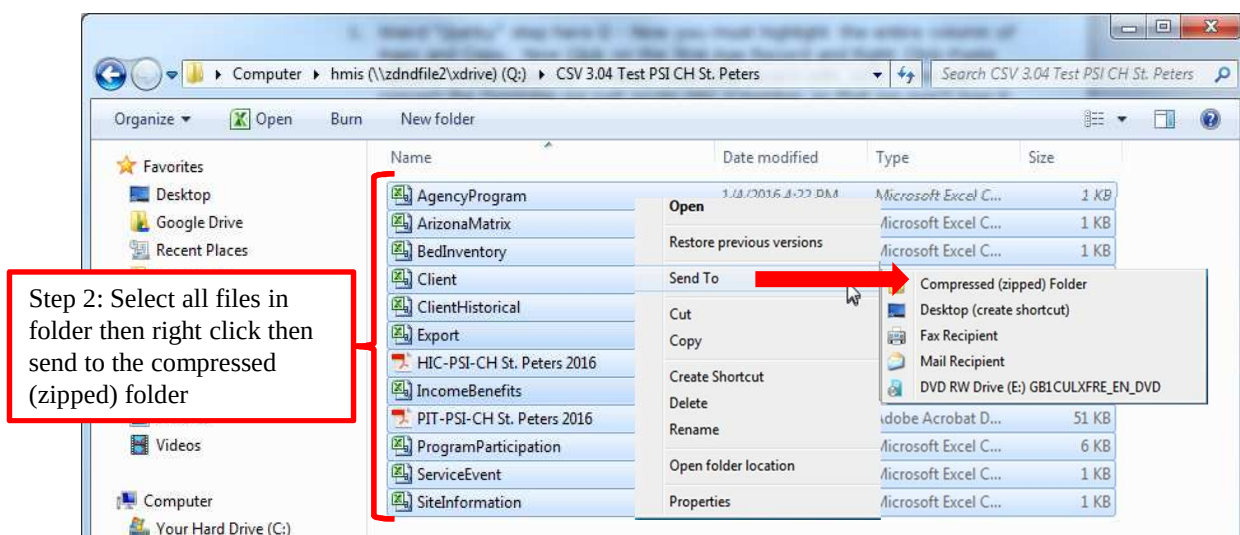
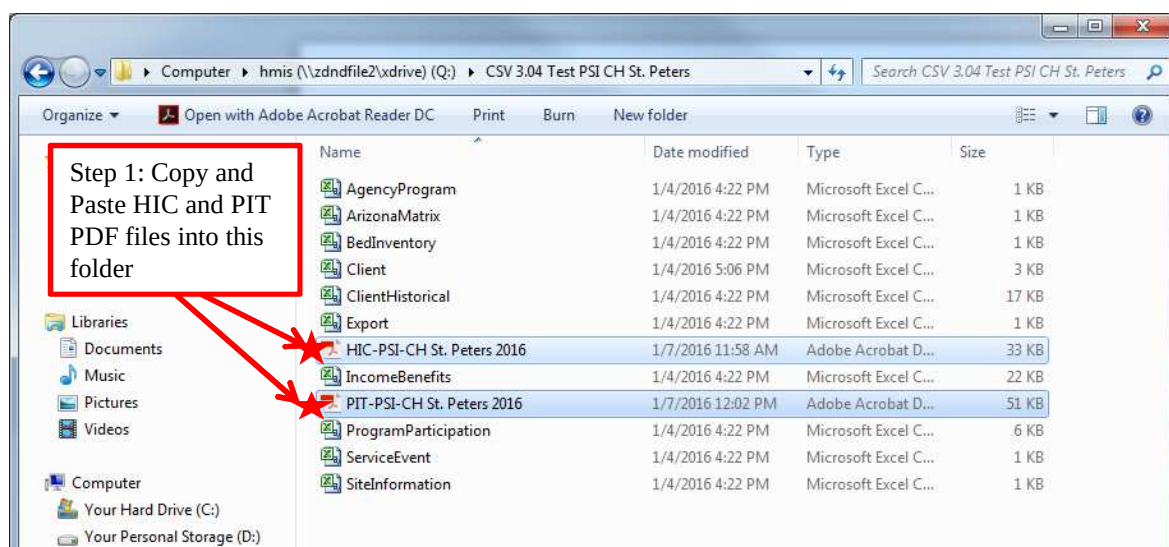
Clipboard Font Alignment Number Styles Cells Editing

Note: This is what the client table should look like once you are done

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Organizati	PersonalId	SocialSec	Age	DateOfBir	PrimaryRa	Secondary	Ethnicity	Gender	DateAdd	DateUpda	UpdateOrt	IdentityVe	ReleaseOf	ExportIDStr					
1	19 8D309802	1	63		1	5			0	1 3/4/2009	#####				1350					
2	19 DBD5CD4	1	36		1	1			0	0 #####	#####				1350					
3	19 AF425CCA	1	59		1	3			0	1 #####	#####				1350					
4	19 D5073386	1	56		1	2			0	1 #####	#####				1350					
5	19 E2350620	1	70		1	3			0	1 #####	#####				1350					
6	19 4F0D1A6E	1	60		1	3			0	1 #####	#####				1350					
7	19 2E13A75C	1	50		1	3			0	0 #####	#####				1350					
8	19 81DA5BEE	1	53		1	5			0	1 #####	#####				1350					
9	19 DE325729	1	47		1	3			0	1 #####	6/2/2015				1350					
10	19 7D60109C	1	39		1	3			0	1 #####	#####				1350					
11	19 CB55115A	1	46		1	5			0	0 #####	#####				1350					
12	19 1641AEB7	1	60		1	3			0	0 #####	3/4/2015				1350					
13	19 F7BCF6F7	1	61		1	3			0	0 #####	#####				1350					
14	19 DF486CCC	1	36		1	3			0	1 #####	#####				1350					
15	19 C1D59C3C	1	70		1	3			0	1 #####	#####				1350					
16	19 5D4A909D	1	41		1	3			0	0 #####	#####				1350					
17	19 221E8F58	1	56		1	5			0	1 #####	7/8/2015				1350					
18	19 ADCE0920	1	63		1	5			0	1 #####	#####				1350					
19	19 B52117D7	1	66		1	3			0	1 #####	#####				1350					
20	19 F17BD33A	1	60		1	5			0	1 #####	#####				1350					
21	19 08A76371	1	59		1	3			0	1 #####	#####				1350					
22	19 C068BCCC	1	55		1	5			0	0 #####	#####				1350					
23	19 755A1048	1	53		1	5			0	1 #####	#####				1350					
24	19 C64D1EE0	1	45		1	3			0	1 #####	#####				1350					
25	19 086C7116	1	38		1	5			1	1 4/4/2012	#####				1350					
26	19 49B25919	1	59		1	5			0	0 #####	#####				1350					
27	19 C3934EF4	1	60		1	5			0	1 #####	#####				1350					
28																				

110%

Instructions on How to Zip Files



Before you go...

- If you do not have Zip installed, you may check out a free version at www.winzip.com or www.7-zip.org
- Please be sure to Only Zip files together for one program. Each program should be its own package. Please Name your Zip Files “Agency Name – Program Name 2016”
- Once all your files have been zipped, please send via email to: Jennifer.flynn@boston.gov