MKE CoC Direct Benefits Report Guide

This is a submission guide is for Milwaukee agencies funded with State or City ESG dollars

Institute for Community Alliances, March 2022

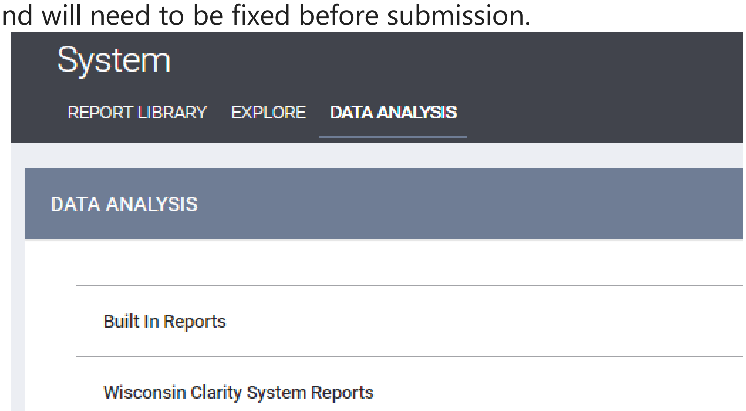
The Direct Benefits Report (DBR) must be submitted to the city. The DBR in Clarity will combine both the detailed and the aggregate data in one report. You will be required to submit by the 10th of the month with the prior's months data. For example, if you are submitting a report by May 10th, then April's data will be what is *actually* reported on.

This training is intended to be used by the following:

1. Agencies that received State ESG or City ESG funding.
2. Those same agencies also have a fully executed grant (at the time of writing this guide, no agency has this yet, so this guide is more for practice in generating the DBR)
3. You have the appropriate Looker License needed to generate this "Data Analysis" report.
    - If you do not have that access, you may email your HMIS system administrator for more information and pricing to add that role to your account.

Preparing the data for the DBR

- Start by running the "DBR – Client Detail Table" report
- You can find this by clicking Reports – Data Analysis – Wisconsin Clarity System Reports – DBR client detail table.
- Run this report to address any data errors. Fields that are "data not collected" or "data missing" will result in errors and will need to be fixed before submission.



Scroll down to the DBR – Client Detail Table report.

Explanation of the 4 different parameters of the DBR

The example will be a City ESG funded project that is collecting data for the month of January 2021.

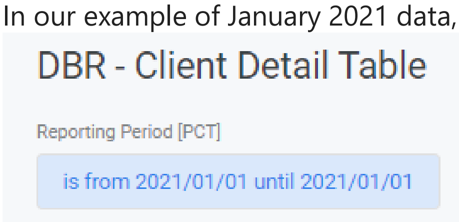
Reporting Period [PCT] – PCT stands for Previous Cumulative Totals

This parameter will be dependent on your specific funding source's grant reporting period:

- City ESG's starts on January 1.
- State ESG's starts on July 1.

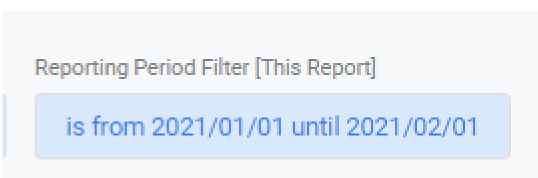
This parameter will always be for the previous reporting period of that year. For example, if you are City ESG funded and running a report wanting data from 2021, you would always have a start date of January 1, 2021. This is to ensure that only clients enrolled and active after 1/1/21 are showing up. That is the cumulative total.

In our example of January 2021 data, the input would look like this:



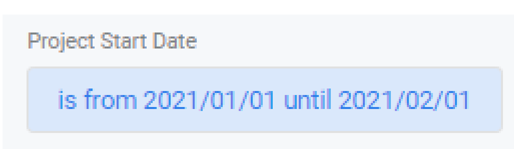
Reporting Period Filter [This report]

Reporting period is more straight forward, this indicates you would like to include people served in this time range. You need the range to be plus ONE day. For our January example, it would be:



Project Start Date

In our January example, this is range of time in which you currently have clients start the program. This example is the same as the reporting period filter above.



Reporting Period Filter [Totals]

This will include the entire time range, from the very beginning of the Reporting Period [PCT] until the end (usually the end date of the Reporting Period Filter)

A review of what the January 2022 parameters should look like:

DBR - Client Detail Table

Reporting Period [PCT]	Reporting Period Filter [This Report]	Project Start Date	Reporting Period Filter [Totals]
is from 2022/01/01 until 2022/01/01	is from 2022/01/01 until 2022/02/01	is from 2022/01/01 until 2022/02/01	is from 2022/01/01 until 2022/02/01

Here are some results from the client detail report. Please note that any fields that have the null sign need to be fixed before submission. These are the essential data elements you must report on and are the HUD universal data elements for ESG funded projects.

Percent of AMI	Female HoH?	Project Start Date	Project Exit Date
∅	Yes	2021-09-16	2022-02-01
∅	Yes	2021-07-01	∅
Less than 30%	Yes	2020-09-30	∅
∅	No	2021-11-03	∅
∅	No	2021-02-09	∅
∅	No	2021-04-05	∅
Less than 30%	No	2021-03-24	∅
Less than 30%	No	2021-02-11	∅
∅	No	2020-10-20	∅
∅	Yes	2021-08-10	∅
∅	Yes	2021-02-10	2022-02-18
∅	No	2021-02-10	2022-02-18
Less than 30%	No	2021-02-10	2022-02-18
∅	Yes	2021-05-17	∅
∅	Yes	2021-09-27	∅
∅	Yes	2021-08-31	∅
Less than 30%	Yes	2020-10-28	∅
Less than 30%	Yes	2020-10-07	2022-01-11
∅	No	2021-11-04	∅
Less than 30%	Yes	2020-10-15	∅
∅	No	2021-05-25	∅
∅	Yes	2021-06-19	∅
∅	No	2021-12-16	∅

February Parameter Example

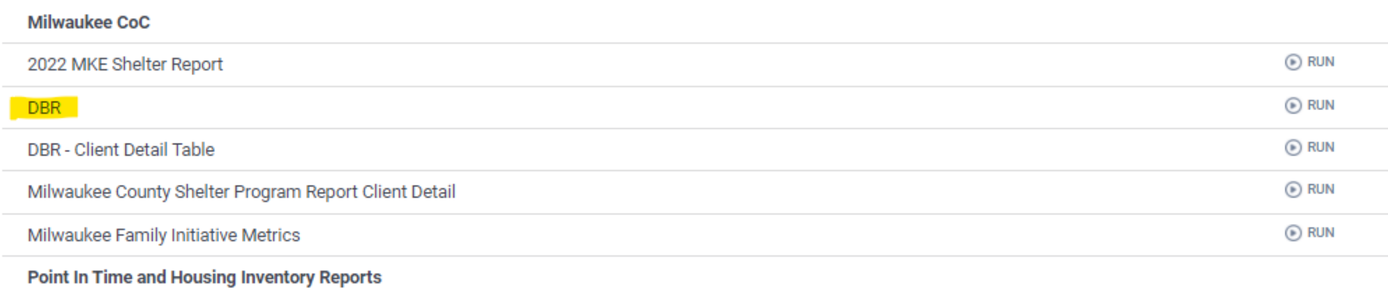
DBR - Client Detail Table

Reporting Period [PCT]	Reporting Period Filter [This Report]	Project Start Date	Reporting Period Filter [Totals]
is from 2022/01/01 until 2022/02/01	is from 2022/02/01 until 2022/03/01	is from 2022/02/01 until 2022/03/01	is from 2022/01/01 until 2022/03/01

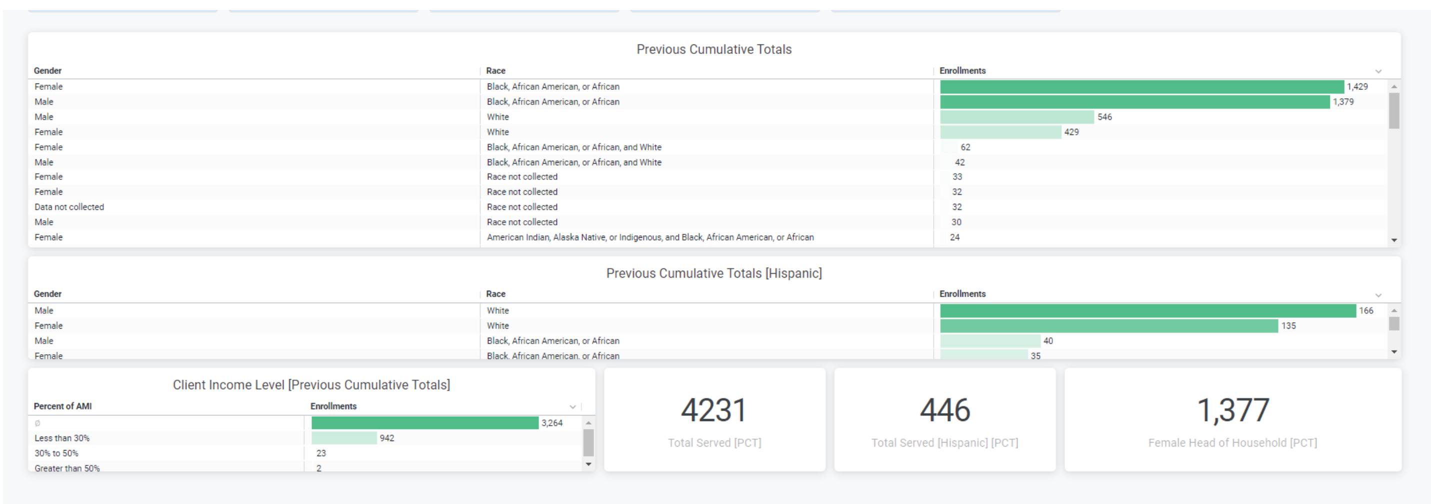
To easier fix your data, download the report as CSV so you can open it as a spreadsheet and more easily organize your data.

General DBR

When your data is completely fixed after running the DBR client details report, you can run the general DBR to officially submit your data. This is found by clicking Reports – Data Analysis – Wisconsin Clarity System Reports – DBR.

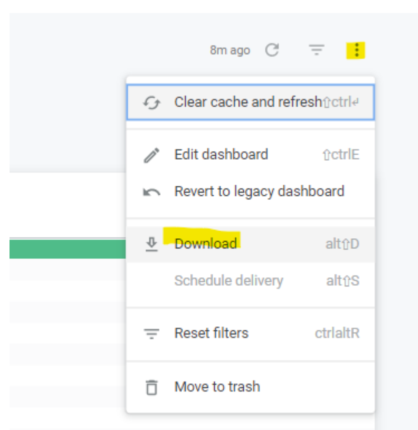


The data looks a bit different than the client detail table, here is an example:

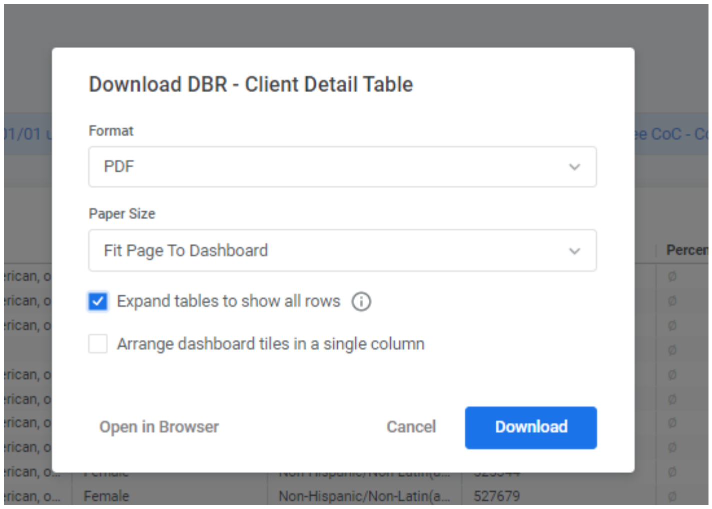


When you have run and reviewed the client detail DBR, fixed any missing or incomplete data, and are confident you are ready to submit, you can run the general DBR as you did the DBR client detail table. When you are ready to download, follow these steps:

- Click the three dots in the top right corner of the screen, click download



- Download as PDF, fit page to dashboard, and click “expand tables to show all rows”
- Click the blue download button



Naming Conventions – rename your file before submitting your final report

- After you download the file, right click on the file in your downloads folder and click “rename”.
- You will rename the file as “Agency – Program – Type of Report – Month the report was run – Account Number”
- Eg. “Cathedral Center – ES – DBR – January 2022 – Account #”