

Preparing for Data Migration

COMPASS ROSE



2016

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Migrating COMPASS ROSE Data

Update Agency Information

From the My Agency Menu (Info):
Ensure ALL Agency Contact Information is Current/Up to Date

If your agency name needs to be changed/updated, please contact Pathways Support at support@pcni.org for assistance.



MAIN		Agency Information Maintenance	
Search		Update Agency Information	
My Agency	Name	ALockett Test/Training/Demo Agency	
My Region	Legal Name	ALockett Test/Training/Demo Agency	
My Groups	Agency Key	13328	
I & R	Display Code	A5A	
Reports	Short Name	ALockett Agency	
Help	Address One	<input type="text" value="No Address"/>	
Scan Station	Address Two	<input type="text"/>	
Tutorial	City	<input type="text" value="Atlanta"/>	
Switch User	State	Hawaii <input type="text"/>	
Log Out	Zip	<input type="text" value="30345"/>	
	Mailing Address One	<input type="text" value="No Address"/>	
	Mailing Address Two	<input type="text"/>	
	Mailing City	<input type="text" value="Atlanta"/>	
	Mailing State	Georgia <input type="text"/>	
	Mailing Zip	<input type="text" value="30345"/>	
	Privacy Level	0-No Privacy <input type="text"/>	
	Director	First Name <input type="text"/>	Last Name <input type="text"/>
		Phone <input type="text"/>	
		Email <input type="text"/>	
	Alternate Phone	<input type="text" value="(777)777-7777"/>	
	Fax	<input type="text"/>	
	Alternate Contact Email	<input type="text" value="not@thistime.com"/>	

- MY AGENCY**
- Info
- Fields
- Funds
- Keywords
- Profile
- Projects
- Reasons
- Referrals
- Services
- Beds
- Admissions
- Reservations
- Users
- Homelessness
- Sites
- Barcoding
- Service Item
- Assessments
- Prioritization

Migrating COMPASS ROSE Data

Update Agency User Information



MAIN

- Search
- My Agency
- I & R
- Reports
- Help
- Scan Station
- Tutorial
- Log Out

Agency User Maintenance

[New](#)

	User ID	User Name	Phone	Email	Last Training	Agency Admin	Active	Password Expiration
<input type="checkbox"/>	april.demo	April Lockett		april.lockett@dca.ga.gov		Y	A	Expired
<input type="checkbox"/>	data.cleaning	Data Cleaning				Y	I	Expired

MY AGENCY

- Info
- Fields
- Funds
- Keywords
- Profile
- Projects
- Reasons
- Referrals
- Services
- Users

From the My Agency Menu (Users):

Delete ALL Inactive User Accounts & Ensure ALL User Contact Information is Complete and Correct

Migrating COMPASS ROSE Data

Identify an Agency Migration Coordinator

- Define a Data Accuracy Timeline
- Create a Listing of Data that YOUR agency has been capturing on the COMPASS ROSE system that you would like to be migrated
 - i.e. Client Services, Case Notes, Assessments, etc.
- Define the Reporting Period needed for your agency's data migration
 - 7 years of data will be migrated to ClientTrack

Migrating COMPASS ROSE Data

Update Agency Project Information

From the My Agency Menu
(Projects):



Ensure ALL Agency Project Information is Current/Up to Date

- ✓ DO NOT DELETE A PROJECT PRIOR TO DISCHARGING ALL CLIENTS FROM THE PROJECT
- ✓ Place an "XX" in front of INACTIVE projects that you may want to access data through reports.
- ✓ Edit projects to update Project Name, Bed & Unit Inventory, Grant Information, etc.

	Project Name	Project Key	Project Type	Primary Site	Emergency Shelter Bed-Night Tracking Method	Expected Length(days)	Shared
	DCA ESG PREV	7985	Homelessness Prevention	Training-Demo	Entry/Exit Date		N
	DCA-ESG RRH	7425	PH - Rapid Re-Housing	Training-Demo	Entry/Exit Date		N
	XXDCA-ESG Street Outreach	7424	Street Outreach	Training-Demo	Entry/Exit Date		N

NOTE: Prior to deleting projects, please contact your CoC Lead to ensure that you will not be eliminating data that is needed for community/CoC reporting.

Migrating COMPASS ROSE Data

Assess Currently Enrolled Clients

From the Client Search Page:



Using Advanced Search, select a Project and click Search

- ✓ Ensure that all current clients are appearing in the search results.
- ✓ If not a client is missing, search for that client and enroll them

Client Search

Community Card Search
 Scan or Enter Community Card
 Include Household Members

Client Key Search
 Client Key
 Include Household Members

Advanced Search
 First: Middle: Last:
 Identification: Date of Birth: Gender: (Select)
 Street Address:
 City: State: (None) Zip: County: (None)
 Project (Name - Type - Site):

Client Information							Go To ...			
Key	ID	Name	Age	Last service date	Authorization Expiration	General page	Process this client	Add new household member	Discharge this client	
1293001	*****	Child, Demo's	8	11/30/2014	11/02/2020	General	Process	Add	Discharge	
1292981	*****	Client, Demo	38	03/04/2015	11/02/2020	General	Process	Add	Discharge	

Migrating COMPASS ROSE Data

Discharge Exited Clients from Projects

From the Client Search Page:

Using Advanced Search, select a Project and click Search

✓ *If a client is appearing the search results that has exited the project, Use the Discharge link to exit them.*

✓ *Only **Currently Enrolled** Clients should appear in results.*



MAIN

- Search
- My Agency
- T & R
- Reports
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- Log Out

Client Search

Community Card Search
 Scan or Enter Community Card
 Include Household Members

Client Key Search
 Client Key
 Include Household Members

Advanced Search
 First Middle Last
 Identification Date of Birth Gender
 Street Address
 City State Zip County
 Project (Name - Type - Site)

Client Information				Go To ...					
Key	ID	Name	Age	Last service date	Authorization Expiration	General page	Process this client	Add new household member	Discharge this client
1293001	*****	Child, Demo's	8	11/30/2014	11/02/2020	General	Process	Add	Discharge
1292981	*****	Client, Demo	38	03/04/2015	11/02/2020	General	Process	Add	Discharge



Migrating COMPASS ROSE Data

Monitor Current Clients and Client Activity

- Utilize Project and Service driven reports to ensure proper data collection and optimal data quality
 - Report Suggestions:
 - ✓ Current Program Roster (Summary Report)
 - ✓ Program Enrollment & Discharge Export (Data Export)
 - ✓ For Non-HUD related information, try running any of the Data Export reports
 - Assessment, Client Information, Custom Information, Service Information, etc.

Migrating COMPASS ROSE Data

- COMPASS ROSE Support
 - Email: support@pcni.org
 - Phone: (404) 639-9933/(866) 818-1032 ext. 2
 - For Training & Tutorials: Visit the PCNI Training Site at www.pathwaystraining.org

Migrating COMPASS ROSE Data

- For Data Migration Questions or Concerns
 - April Lockett
 - Email: April.Lockett@dca.ga.gov
 - Jeanette Pollock
 - Email: Jeanette.Pollock@dca.ga.gov



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Community Affairs