IDA Quarterly Data Cleanup | Part 1 & 2 Overview

Purpose & Context: Neighborhood Partnerships (NP) uses IDA data to report program outcomes to the Oregon Legislature in our biennial report. This helps fund IDAs long-term.

NP also uses IDA data to track equity goals for reaching BIPOC communities, folks with very low incomes, folks with disabilities, etc. Overall, data cleanup helps us collect and report accurate and complete info, allowing us to better understand impacts and outcomes for IDA savers.

Common Outcome Tracker (OT) Data Issues:

- Typos | Missing info | Inaccurate info | Inconsistent info | Technical issues or bugs

Quarterly Schedule & Due Dates:

- **Part 1:** Feb 1, May 1, Aug 1, Nov 1 (or first business day after, if on a weekend).
- **Part 2:** Approximately Mar 15, June 15, Sep 15, Dec 15 (may shift quarterly).

NP Contact Person:

- **Derrick Taruc**, Equity Integration & Digital Technology Manager
    - dtaruc@neighborhoodpartnerships.org
- Email with **questions**, and a **quick confirmation when Parts 1 & 2 are done.**

Tips & Info:

- **Ask questions anytime. NP is here to help!**
- **If anything seems odd or incorrect, let us know ASAP.**
    - If it's beyond your control, we want to fix it before you spend a ton of time on it.
    - **Example:** In Part 2, if NP reports that data is missing, but you can see the data in OT, it could be a bug, or you may need to save/update each tab or activity.
- If your organization has customized OT in extra ways, this can cause OT complications. This can usually be fixed in the question setup (NP or VistaShare can help).
    - **Example:** OT customization for programs other than IDAs, such as HUD.
- The **IDA Provider's Toolbox** also has many general documents (more info below).

Handling Missing Data

1. If you have the data in paper files, please enter it in OT.
2. If the data appears to exist in OT, click "Save" or "Update" on the tab or activity (otherwise it will not be visible to NP).
3. If the data exists in another location in OT, ask NP if the two locations can be linked.
4. For Exit data, it's fine to copy data from other places if it's available elsewhere. Or, if you do not have the data elsewhere, and the saver declined to answer, please select "Yes" for "Info not available/participant declines to answer".
    - **Example:** If you have data for Home Purchase Price on the Withdrawal Request Form (either the price itself, or if the saver declined to answer), you can just copy the data from the Withdrawal Request Form to the Exit tab.
5. If the saver has not declined to answer a question, please contact them for an answer.
6. **Note:** For the Financial Capability Scale, please contact savers at least 2x.
7. **Note:** Data used to determine eligibility should be recorded somewhere (OT or paper files). For data used in evaluation purposes, *but not to determine eligibility*, NP recognizes that it's not always possible to gather every bit of data.

Quarterly Data Cleanup Part 1 (FO screens data issues & FO fixes them)

- NP emails a Part 1 reminder three weeks before the due date. Email includes:
  - **Date range (to enter for intake & exit reports in OT)**
  - **Due date**
- FO downloads intake & exit reports from OT (as two Excel spreadsheets).
- Go to Outcome Tracker > Reports > Shared Network Reports > Quarterly Reports:
  - NP Data Collection--**Intake** Data Report
  - NP Data Collection--**Exit** Data Report
- For each report, go to Results > Prompted Fields:
  - **Enter date range** from reminder email > Click GO
- Scroll right > Tasks > Export to Spreadsheet
  - ***Note: Your browser may block the OT download/pop-up.***
    In Firefox, you can allow OT downloads/pop-ups here:
    Settings > Privacy & Security > Permissions > Block pop-up windows > Exceptions > Address: https://www.vistashare.com > Allow > Save
- Format spreadsheet to highlight blank/missing data.
  - See step-by-step screenshots in the **Part 1 Instructions (see Toolbox)**.
- Enter as much missing data in OT as possible by the **due date**.
- For data you don't have, please see **Handling Missing Data** (earlier in this document).
- **Email Derrick with any questions, and to briefly confirm completion of Part 1.**
- **Due Dates:** Feb 1, May 1, Aug 1, Nov 1 (or first business day after, if on a weekend).
  - **Note:** NP can't really offer extensions on Part 1. We need Part 1 done before we start Part 2 (when NP downloads the data from OT). If Part 1 isn't done on time, it holds up the whole process for NP.
  - **Note:** NP uses the data downloaded after Part 1 for reporting purposes – so if a lot is missing, it affects the reports. Missing data is also added to Part 2's Quarterly Data Cleanup Request, which can leave a lot to address all at once.

Quarterly Data Cleanup – Part 1 Instructions (see Toolbox):
- **Location in IDA Provider's Toolbox:** *E. Quarterly Data Cleanup Instructions*
- This is a document giving a step-by-step walkthrough for Part 1 (with screenshots).

Quarterly Data Cleanup Part 2 (NP screens data issues & FO fixes them)

- NP downloads data from all IDA providers to screen for data issues that will not show up in Part 1 (or didn't get addressed). We also use this data for reporting purposes.
- NP emails each FO about Part 2. Email includes:
  - **A Word file (with all remaining data issues to fix in OT)**
  - **Due date**
- Enter as much missing data in OT as possible by the **due date**.
- For any data you don't have, please see "Handling Missing Data" for guidance.
- **Email Derrick with any questions, and to briefly confirm completion of Part 2.**
- **Due Dates:** Within 30 days of NP emailing the Quarterly Data Cleanup Request. The date is usually near Mar 15, June 15, Sep 15, Dec 15, but may shift by a few days each quarter.
  - **Note:** NP can offer occasional flexibility on Part 2's due dates (e.g. if you have new staff for data cleanup, difficulty accessing paper files during COVID, etc.).

Further Resources

Data Dictionary At-A-Glance (for OT Fields)

- **Location in IDA Provider's Toolbox:** *G. Data Collection Materials*
- This document gives a **quick summary of OT fields**.

Data Dictionary Long Version (for OT Fields)

- **Location in IDA Provider's Toolbox:** *G. Data Collection Materials*
- This document gives **detailed info on OT fields**.
- Explains the OT fields used for IDA data (and if each field is required by NP, AFI, or both).
  - **Examples:** Address, income, debts, account status, transactions, asset type, etc.
- Explains how to complete each field, what you can or cannot enter, etc.
  - **Example:** For small business/microenterprise IDAs, "Business profits" must have a dollar figure (an estimate is fine), or just "$0". But it should not be blank.

IDA Provider's Toolbox:

- **https://oregonidainitiative.org** > Bottom right corner > For Fiduciary Organizations
  - Password = IDAInitiative!
- **Quarterly Data Cleanup – Part 1 & 2 Overview:** *E. Quarterly Data Cleanup Instructions*
- **Quarterly Data Cleanup – Part 1 Instructions:** *E. Quarterly Data Cleanup Instructions*
- **Data Dictionary At-A-Glance:** *G. Data Collection Materials*
- **Data Dictionary Long Version:** *G. Data Collection Materials*