HMIS Project Set-Up 101

Presenters
Joan Domenech, Corporation for Supportive Housing (CSH)
Brian Roccapriore, The Cloudburst Group
Webinar Instructions

• Webinar will last about 60 minutes
• Access to recorded version
• Participants in ‘listen only’ mode
• Submit content related questions in Q&A box on right side of screen
• For technical issues, request assistance through the Chat box
Questions?

• Please submit your content related questions and comments via the chat box

• Send to everyone
Technical Difficulties

- Please submit any technical issue related questions via the Chat box
- Send the message directly to the Host
- Host will work directly with you to resolve those issues
About NHSDC

The National Human Services Data Consortium (NHSDC) is an organization focused on developing effective leadership for the best use of information technology to manage human services. NHSDC provides information, assistance, peer to peer education and lifelong learning to its conference participants, website members and other interested parties in the articulation, planning, implementation and continuous operation of technology initiatives to collect, aggregate, analyze and present information regarding the provision of human services.

NHSDC holds two conferences every year that convene human services administrators primarily working in the homeless services data space together to learn best practices and share knowledge. The past 3 events have been put on with HUD as a co-sponsor. Learn more on our web site www.nhsdc.org.

After this virtual conference is over, NHSDC will be sending out a survey to learn about your experience. Please help us by signing up for emails and participating in the survey.
Which of the following roles represents you?

- HMIS Lead
- HMIS System Admin
- HMIS Trainer
- CoC Lead
- CE Lead
How long have you been in that role?

- Less than 6 months
- 6-12 months
- 1-2 years
- 2-3 years
- 3+ years
Meet the presenters: Joan Domenech

- Program Manager, Corporation for Supportive Housing (CSH)
- Previous areas of work: Justice System, Coordinated Entry, HMIS, Data.
Meet the presenters: Brian Roccapriore

• Senior Technical Assistance Provider
• The Cloudburst Group
• Oversees homeless programs and data analytics work
• Previously: 6 years as HMIS Lead in the State of Connecticut
Learning objectives

• Understand the fundamentals of HMIS project set up and the importance of project set up for required reporting

• Understand HUD and Federal Partner project set up and data collection requirements (CoC, ESG, HOPWA, PATH, RHY, VA)

• Learn about resources available for project set up (documentation and SMEs)
What do you see as your biggest challenges with project set up?
Project Type

Services provided
Lodging/non lodging

How the services are funded

What we want to know about participants?

Programs

UDE’s
<table>
<thead>
<tr>
<th>PROGRAMS</th>
<th>PROGRAM COMPONENTS</th>
<th>HMIS Project Type</th>
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</thead>
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<tr>
<td>CoC</td>
<td>Safe Haven</td>
<td>Safe Haven</td>
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<td></td>
<td>Street Outreach</td>
<td>Street Outreach</td>
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<td></td>
<td>Supportive Services</td>
<td>PH – PSH</td>
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<td></td>
<td>Short Term Housing (STH)</td>
<td>PH – RRH</td>
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<td>Permanent Housing (PH)</td>
<td>Transitional</td>
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<td></td>
<td>Hotel/Motel (H/M)</td>
<td>Housing</td>
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<td></td>
<td>Transitional Housing (TH)</td>
<td>Homelessness</td>
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<td></td>
<td>Joint TH and PH-RRH</td>
<td>Prevention</td>
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<td>Housing Information (HI)</td>
<td>Emergency</td>
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<td></td>
<td>Homelessness Prevention</td>
<td>Shelter</td>
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<tr>
<td></td>
<td>Permanent Housing TBRA</td>
<td>Services Only</td>
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<tr>
<td></td>
<td>Emergency Shelter - Renovations</td>
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<td></td>
<td>Permanent Housing Facility-Based</td>
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<td>Permanent Housing Placement (PHP)</td>
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<td>Emergency Shelter – Shelter Operations</td>
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<td></td>
<td>Emergency Shelter – Essential Services</td>
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<tr>
<td></td>
<td>Short Term Rent, Mortgage, Utility Assistance (STRMU)</td>
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</tr>
</tbody>
</table>
CoC Program Components

- Supportive Services Only (SSO)
- Homelessness Prevention (HP)
- Transitional Housing (TH)
- Permanent Housing (PH)
  - PSH
  - RRH
  
  TH-RRH Joint Component
<table>
<thead>
<tr>
<th>CoC Program Component</th>
<th>HMIS Project Type</th>
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</thead>
<tbody>
<tr>
<td>Permanent Housing (PH)</td>
<td>PH: Permanent Supportive Housing</td>
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<tr>
<td>Permanent Housing (PH)</td>
<td>PH: Rapid Re-Housing</td>
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<tr>
<td>Supportive Services Only (SSO)</td>
<td>See SSO Chart Below</td>
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<tr>
<td>Transitional Housing (TH)</td>
<td>Transitional Housing</td>
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<tr>
<td>Homelessness Prevention (HP)</td>
<td>Homelessness Prevention</td>
</tr>
<tr>
<td>Safe Haven (SH)</td>
<td>Safe Haven</td>
</tr>
<tr>
<td>Joint TH and PH-RRH</td>
<td>Set up as two separate projects in HMIS:</td>
</tr>
<tr>
<td></td>
<td>- PH: Rapid Re-Housing</td>
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<td></td>
<td>- Transitional Housing</td>
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<tr>
<td>HOPWA Program Component</td>
<td>HMIS Project Type</td>
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<tr>
<td>Permanent Housing TBRA</td>
<td>PH – Permanent Supportive Housing</td>
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<tr>
<td>Permanent Housing Facility-Based</td>
<td>PH – Permanent Supportive Housing</td>
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<td>Transitional Housing</td>
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<td>Emergency Shelter</td>
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<tr>
<td>Hotel/Motel (H/M)</td>
<td>Emergency Shelter</td>
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<tr>
<td>Supportive Services Only not <em>in conjunction with housing (SSO)</em></td>
<td>Services Only</td>
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<tr>
<td>Housing Information (HI)</td>
<td>Services Only</td>
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<tr>
<td>Permanent Housing Placement (PHP)</td>
<td>Services Only</td>
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<td>Short Term Rent, Mortgage, Utility Assistance (STRMU)</td>
<td>Homelessness Prevention</td>
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## RHY Program Components

<table>
<thead>
<tr>
<th>RHY Program Component</th>
<th>HMIS Project Type</th>
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<tbody>
<tr>
<td>Street Outreach Program</td>
<td>Street Outreach</td>
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<tr>
<td>Basic Center Program – Prevention</td>
<td>Homelessness Prevention</td>
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<tr>
<td>Basic Center Program – Emergency Shelter</td>
<td>Emergency Shelter</td>
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<tr>
<td>Basic Center Program – Host Home Shelter</td>
<td>Emergency Shelter</td>
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<tr>
<td>Transitional Living Program</td>
<td>Transitional Housing</td>
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<tr>
<td>Maternity Group Home</td>
<td>Transitional Housing</td>
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<td>Demonstration Grant</td>
<td>Transitional Housing</td>
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## PATH Program Components

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<thead>
<tr>
<th>PATH Program Component</th>
<th>Population of Focus</th>
<th>HMIS Project Type</th>
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<tbody>
<tr>
<td>Street Outreach</td>
<td>Persons who reside in a place <strong>not meant</strong> for human habitation (e.g., streets, abandoned buildings, etc.)</td>
<td>Street Outreach</td>
</tr>
<tr>
<td>Supportive Services</td>
<td>Persons who reside in a place <strong>meant</strong> for human habitation, or who are at risk of homelessness</td>
<td>Supportive Services</td>
</tr>
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</table>
# ESG Program Components

<table>
<thead>
<tr>
<th>ESG Program Component - Activity</th>
<th>Continuum Project Type</th>
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<tbody>
<tr>
<td>Street Outreach</td>
<td>Street Outreach</td>
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<td>Emergency Shelter – Shelter Operations</td>
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<td>Day Shelter*</td>
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<td>Transitional Housing**</td>
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<tr>
<td>Emergency Shelter – Essential Services</td>
<td>Emergency Shelter</td>
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<tr>
<td>Homelessness Prevention</td>
<td>Homelessness Prevention</td>
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<td>Rapid Re-Housing</td>
<td>PH: Rapid Re-Housing</td>
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<td>Funded Component</td>
<td>Project Type #</td>
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<td>------------------------------------------------------</td>
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<td>SSVF: Rapid Rehousing</td>
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<td>SSVF: Homelessness Prevention</td>
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<tr>
<td>SSVF: Rapid Resolution</td>
<td>14 or 6 (determined locally)</td>
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<td>HCHV CRS: EH</td>
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<td>HCHV: Low Demand Safe Haven</td>
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<td>GPD: Bridge Housing</td>
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<td>GPD: Low Demand</td>
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<td>GPD: Service Intensive Transitional Housing</td>
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<td>GPD: Hospital to Housing</td>
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<td>GPD: Clinical Treatment</td>
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<tr>
<td>GPD: Transition in Place</td>
<td>9</td>
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<tr>
<td>GPD: Case Management/Housing Retention</td>
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## Project Set Up Resources: Federal Partner Program Manuals

HUD HMIS Main page- [https://www.hudexchange.info/programs/hmis/](https://www.hudexchange.info/programs/hmis/)

<table>
<thead>
<tr>
<th>General Information</th>
<th>Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuum of Care (CoC) Program</td>
<td>CoC Program – HMIS Manual</td>
</tr>
<tr>
<td></td>
<td>Project Set Up Joint Component</td>
</tr>
<tr>
<td>Emergency Solutions Grants Program</td>
<td>ESG Program – HMIS Manual</td>
</tr>
<tr>
<td>Housing Opportunities for Persons With AIDS</td>
<td>HOPWA Program – HMIS Manual</td>
</tr>
<tr>
<td>Projects for Assistance in Transition from Homelessness (PATH)</td>
<td>PATH Program - HMIS Manual</td>
</tr>
<tr>
<td>Runaway &amp; Homeless Youth</td>
<td>RHY Program – HMIS Manual</td>
</tr>
<tr>
<td>VA SSVF</td>
<td>VA Program – HMIS Manual</td>
</tr>
</tbody>
</table>
What does PDDE stand for?

<p>| | | |</p>
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<thead>
<tr>
<th></th>
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<tr>
<td>5</td>
<td>Project descriptor data elements</td>
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</tbody>
</table>
Overview of PDDEs

PDDE’s are the building blocks of an HMIS.

They enable the HMIS to:

- associate client-level records with the various projects that the client will enroll in
- clearly define the type of project the client is associated with the entire time they received housing or services
- identify which federal partner programs are providing funding to the project
- track bed and unit inventory and other information, by project
The following Project Descriptor Data Elements are required for project setup in HMIS:

2.01 Organization Information
2.02 Project Information
2.03 Continuum of Care Information
2.06 Funding Sources
2.07 Bed and Unit Inventory Information
PDDEs and HMIS Project Set Up

• One of the most critical steps in accurate data collection and reporting is ensuring that a project is set up properly in an HMIS.

• If project setup is done incorrectly, this will jeopardize the ability to produce accurate, reliable reports.

• Project set up for any project that receives funding from any of the HMIS federal partners must be consistent with the
  a) **HMIS Data Standards Manual** and
  b) the **applicable HMIS Program Manual** for the funding source.
Data Collection: Universal Data Elements

**UDE’s**

The basis for producing unduplicated estimates of the number of people experiencing homelessness, accessing services from homeless assistance projects, basic demographic characteristics of people experiencing homeless, and patterns of service use, including information on shelter stays and homelessness over time.

Data elements which all HMIS participating continuum projects are required to complete.

**Universal Identifier Elements**
- Name
- Social Security Number
- Date of Birth
- Race
- Ethnicity
- Gender
- Veteran Status

**Universal Project Stay Elements**
- Disabling Condition
- Project Start Date
- Project Exit Date
- Destination
- Relationship to Head of Household
- Client Location
- Housing Move-in Date
- Prior Living Situation
A note on 2.03 and 3.16

- “Projects that Operate in Multiple CoCs” section of the HMIS Data Manual (FY2020) explains the general set up for projects serving multiple CoCs.
- 2.03 records the CoC(s) in which the project is funded to operate
- 3.16 is about which CoC (if multiple) the client is ‘tied to’ in that project for reporting purposes
- Both elements help CoCs report accurate data about clients served by projects funded to operate in their CoC – if your 2.03 or 3.16 data leaves someone out of being reported – you need to revise your data collection and project set up practices
- A few examples...
Example: Tenant-based rent assistance where a client is housed in another CoC’s market rate unit
A note on 2.03 and 3.16

Example: One grant funding residential projects in multiple CoCs and grantee is entering data into only one CoC’s HMIS.
Program Specific Data Elements (PSDE)

- Program-Specific Data elements provide information about the characteristics of clients, the services that are provided, and client outcomes.

- Some of the program specific data elements are collected across all federal partner programs. Others are limited to a single federal partner program or even further to a single component of one of the federal partner programs.

- Now includes the new Coordinated Entry data elements!
Common across Federal partners

4.02 Income and Sources
4.03 Non-Cash Benefits
4.04 Health Insurance
4.05 Physical Disability
4.06 Developmental Disability
4.07 Chronic Health Condition
4.08 HIV/AIDS
4.09 Mental Health Problem
4.10 Substance Abuse
4.11 Domestic Violence
4.12 Current Living Situation
4.13 Date of Engagement
4.14 Bed-Night Date
4.19 Coordinated Entry Assessment
4.20 Coordinated Entry Event

Differences

• Date of Engagement
  ----Street Outreach, ES night by night, and Service Only projects

• Coordinated Entry Event
  ----All HMIS Project Types depending on design of Coordinated Entry System.
Coordinated Entry Setup

Only one CE project in HMIS

Single CE project accessible by 1 or more partners

Multiple CE projects set up for different sites or phases of the process

“Catch All” CE project setup to supplement existing data collection

No CE project in HMIS

SO
ES
TH
RRH
PSH
Coordinated Entry Setup

Single Coordinated Entry Project in HMIS

Triage
- Crisis Assessment
  - 3.10
  - 3.917
  - 4.12
  - UDEs
  - 4.19
  - Rest of UDEs

Crisis Bed Referral
- 4.20

Problem Solving
- 4.20

Housing Assessment
- 4.19
- 4.20

PH Referral
- 4.20
- 3.11
- 3.12

PH Move-in

SO
ES
TH
RRH
PSH
Coordinated Entry Setup

CE Project for non-participating projects

Crisis Bed Referral
Housing Assessment
PH Referral

Triage
Crisis Assessment
Crisis Bed Referral
Problem Solving
Housing Assessment
PH Referral

3.10
3.917
4.12
Rest of UDEs
Street Outreach
4.19
4.20
4.19
4.20
3.11
3.12

Emergency Shelter or Transitional Housing
Permanent Housing
PH Move-in
Do you have any insights or lessons learned around project set up and reporting that you can share with the group in the chat?
I have an organization with an ESG funded shelter and street outreach program. Can I set that up as one Project?

- Yes
- No
Are all projects required to collect UDEs?
- Yes
- No
Can a CoC funded VSP provider use your HMIS if no other program can see their data?

- Yes
- No
Project Set Up Things to Consider

- Consult with the organization administering the project and the CoC Lead Agency
- No single project in an HMIS may have more than one project type!
- Data collected on a client, other than basic client info (e.g. Name, SSN, DOB, etc.) must be attributed to a specific project and a specific collection point (entry, exit, update, annual assessment) for reporting.

- Project reporting requirements
- If you have the ability to “customize” the fields in your HMIS you MUST be sure that all the elements required by a funder are present in that project set-up and that any custom fields are “mapped” if necessary to the appropriate response categories. You must work with your vendor to ensure this is done correctly.
Example of a project set up procedure...

Interested Participating project sends request and fills out project set up questionnaire

Agency, CoC and HMIS Lead meet and go over Project set up questionnaire

HMIS Sys Admin creates project in HMIS

Agency receives training and access to Project
# New Agency Setup Form Example - Connecticut

| Year | CoC | Prog. Type | HMIS and HC Organization Name | HMIS and HC Program Name | Who Can Occupy These Beds? | Geo Code | Inventory Type | Bed Type | Target Pop. | Funding Source | Beds Trt w/ Children | Beds Ht w/o Children | Beds Trt w/ Only Children | Zip | County | City/Town | Site Type | Housing Type | Financial Service Account | Yes or No | Start Date | Primary Contact Email | LSA/PIT | CAN | NOPWA |
|------|-----|------------|-------------------------------|---------------------------|----------------------------|----------|----------------|----------|-------------|-----------------|----------------------|---------------------|---------------------|-----------------------|-----|--------|----------|----------|-------------|---------------------|---------|-----------|---------------------|--------|------|-------|
| 2012 | NCL | FSU-D      | Sample Org Name              | Sample Program Name       | Homeless Only (street, ES, or, sponsored building) | 95724    | N              | Y        | N           | HUD CoC – Permanent Supportive Housing | 0       | 0      | 5      |

**List The Users Who Will Need Access To The Program:**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
</tr>
</thead>
</table>

**DMHAS Funded Programs:**

- LOC #: Program #: If your project is DMHAS funded we will need the DMHAS LOC code and Program code
- If HUD - Grant Inventory #: If your project is HUD funded and will be part of your NOPA, please provide the Grant Number
- IF RHY - Grant #: If your project is RHY funded and will be part of please provide the Grant Number

**Definitions for drop down categories are on the next tab.**

- For bed and unit counts, please input the number of beds and units outlined in your contract. For HMIS beds, please input the number of those beds that will be tracked in HMIS.

- If you are unsure of a response leave it blank.
Project Set Up Resources

**HMIS Data Standards Dictionary**
- Detailed information required for system programming of each HMIS element and the responses required for an HMIS software

**HMIS Data Standards Manual**
- Data collection instructions for the Project Descriptor Data Elements, Universal Data Elements, and the common Program Specific Data Elements

**HMIS Federal Partner Program Manuals**
- Contain specific and detailed information on project setup for each of the federal partners participating in HMIS
Fundamentals of Project Set Up

- **HMIS System Administration Training: HUD Programs Set-up**
  Participants will learn:
  About the technical guidance needed by HMIS Lead agencies and HMIS System Administrators to set up HUD funded projects correctly in their HMIS.

- **RRH Bed and Unit Inventory Info**

Project Set Up 201 session will cover Examples for project setting up a project:
- that is a SSO
- with affiliated housing
- with multiple funding sources
How can I be sure my projects are set up correctly in HMIS for each funder and reporting requirement?

Project Set Up 201 session will cover more in depth example on how to use the **project setup tool**

<table>
<thead>
<tr>
<th>Federal Program 1:</th>
<th>Federal Program 2:</th>
<th>Federal Program 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUD:CoC – Rapid Re-Housing</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Based on your selections above, the HMIS project type must be:

- **1st Component’s Project Type:** PH - Rapid Re-Housing
- **2nd Component’s Project Type:** N/A
- **3rd Component’s Project Type:** N/A

Based upon the HMIS project type indicated above, the following project-specific data elements must be collected for this project:

<table>
<thead>
<tr>
<th>Element</th>
<th>Required Element</th>
<th>Required Element</th>
<th>Required Element</th>
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<tbody>
<tr>
<td>4.2 Income and Sources</td>
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<tr>
<td>4.3 Non-Cash Benefits</td>
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<td>4.4 Health Insurance</td>
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<td>4.5 Physical Disability</td>
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<td>4.6 Developmental Disability</td>
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<td>4.7 Chronic Health Condition</td>
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<td>4.8 HIV/AIDS</td>
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<td>4.13</td>
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</tbody>
</table>
Project Set Up Tool Scenario

Project 1 – CoC Rapid Re-Housing

Project 2 – ESG Rapid Re-Housing

Project Set Up 201 session will cover more in depth scenarios for using the project set up tool
Project Set Up Tool Scenario

Project 1 – ESG Rapid Re-Housing

Project 2 – ESG Homelessness Prevention

** Note: This tool is intended to provide a general framework for project setup in HMIS by System Administrators. A project with inconsistent program components means that the two or more funding sources cannot be combined in a single project in the HMIS and generate the required federal reports. If you believe your system can allow those funding sources to be combined because of specialized functionality within the system, System Administrators should verify that with the HMIS Vendor/Provider.

Project Set Up 201 session will cover more in depth scenarios for using the project set up tool.
Resources

• SNAPS Data Strategy:
  

• HMIS Lead Series Products:
  

• HMIS Leads & Administrators Hub – email hmis@cloudburstgroup.com to sign up
COVID-19 HMIS Resources

- HUD Resources and Community Examples:
Project Set Up 201 Session Overview

Common Project Set Up Challenges

1. PDDEs
2. Multiple Funding Sources
3. New/demo funding sources
4. Multiple Sub recipients
5. Project Type Changes
6. Project Closures, Consolidations & transferring
7. Reporting
8. Comparable Database
When in doubt, STOP and Ask A Question:

To submit a question to the HMIS AAQ portal:
Select “HMIS: Homeless Management Information Systems” in the “My question is related to” drop down list on Step 2 of the question submission process.
Questions?
Reminder: HUD is offering a Certificate-of-Completion for completing four of the seven sessions within the HMIS Foundations track.

To earn credit for completion of this session, please make sure you included your contact details when the session began.
Thank You!

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