



HMIS Project Set-Up 101

Presenters

Joan Domenech, Corporation for Supportive Housing (CSH)

Brian Roccapriore, The Cloudburst Group

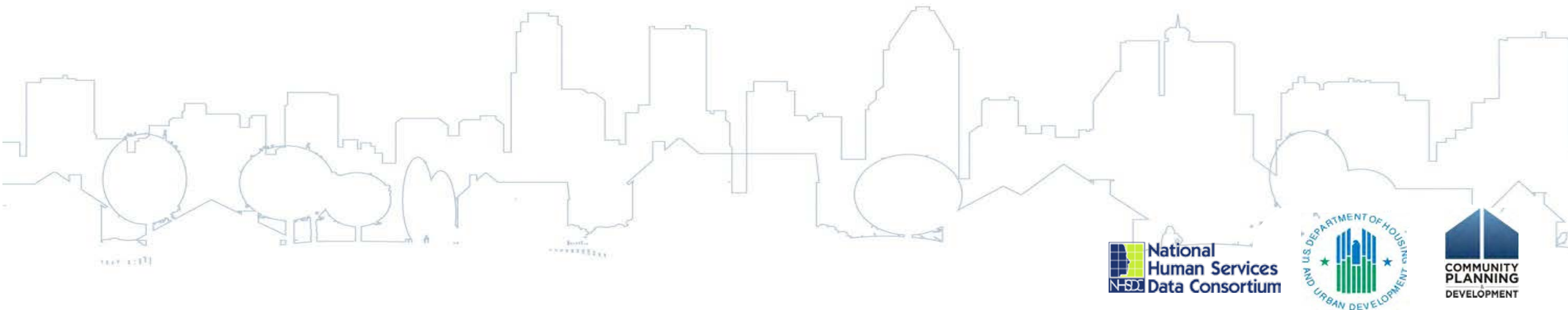


Webinar Instructions

- 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

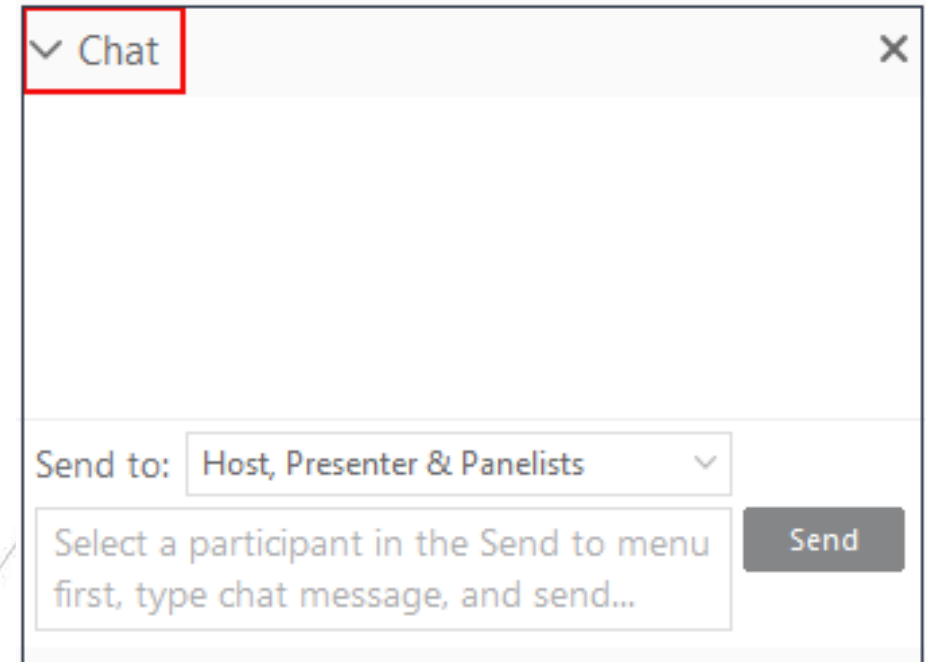
Questions?

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- **Send to everyone**



Technical Difficulties

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- 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



Poll

Which of the following roles represents you?

- HMIS Lead
- HMIS System Admin
- HMIS Trainer
- CoC Lead
- CE Lead

Poll

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)
- Current areas of work: Unsheltered Homelessness TA, COP Data Quality, HMIS NOFA TA, Performance Management.
- Previous areas of work : Justice System, Coordinated Entry, HMIS, Data.

Meet the presenters: Brian Roccapriore

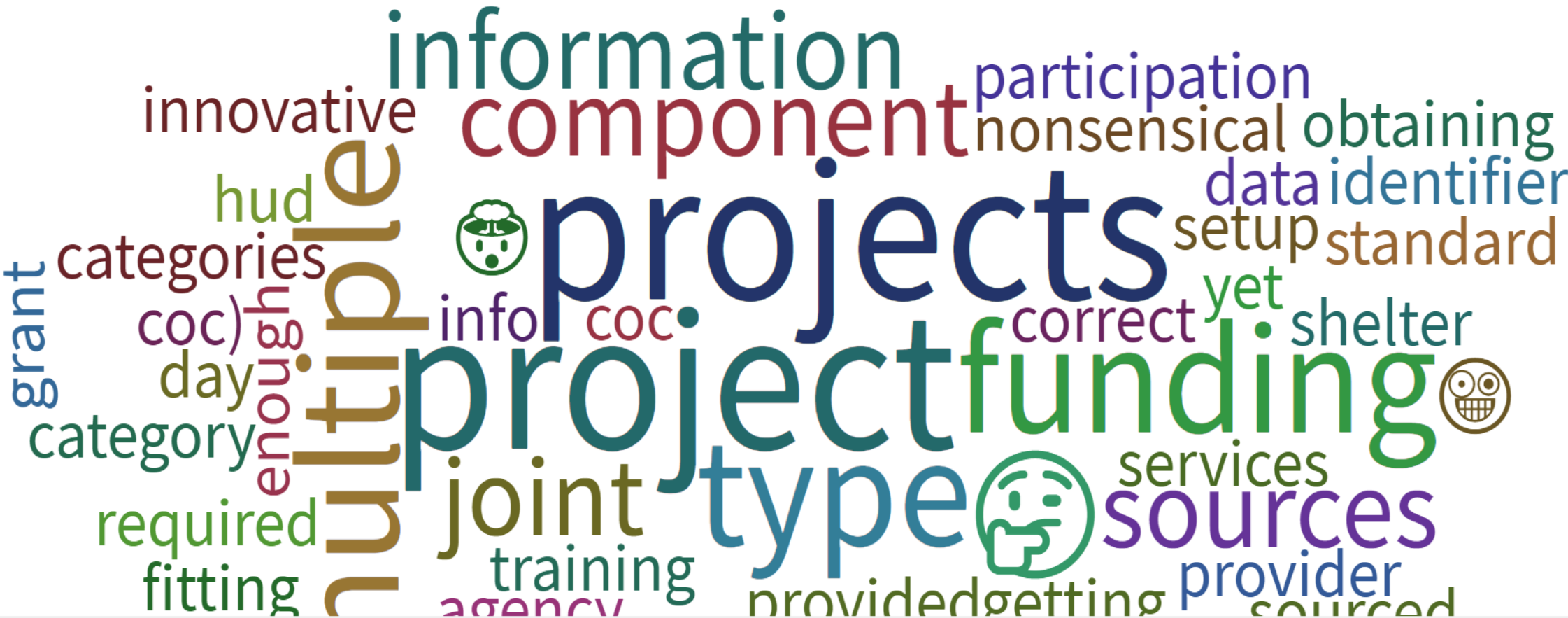


- Senior Technical Assistance Provider
 - The Cloudburst Group
- Oversees homeless programs and data analytics work
- Previously: 6 years as HMIS Lead in the State of Connecticut

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?





Services provided

Lodging/non lodging

Project Type



How the services are funded

Programs



What we want to know about participants?

UDE's

PROGRAMS

PROGRAM COMPONENTS

HMIS Project Type

CoC

ESG

HOPWA

PATH

VA

RHY

Safe Haven

Street Outreach

Supportive Services

Short Term Housing (STH)

Permanent Housing (PH)

Hotel/Motel (H/M)

Transitional Housing (TH)

Joint TH and PH-RRH

Housing Information (HI)

Homelessness Prevention

Permanent Housing TBRA

Emergency Shelter - Renovations

Permanent Housing Facility-Based

Permanent Housing Placement (PHP)

Emergency Shelter – Shelter Operations

Emergency Shelter – Essential Services

Short Term Rent, Mortgage, Utility Assistance (STRMU)

Safe Haven

Street Outreach

PH – PSH

PH – RRH

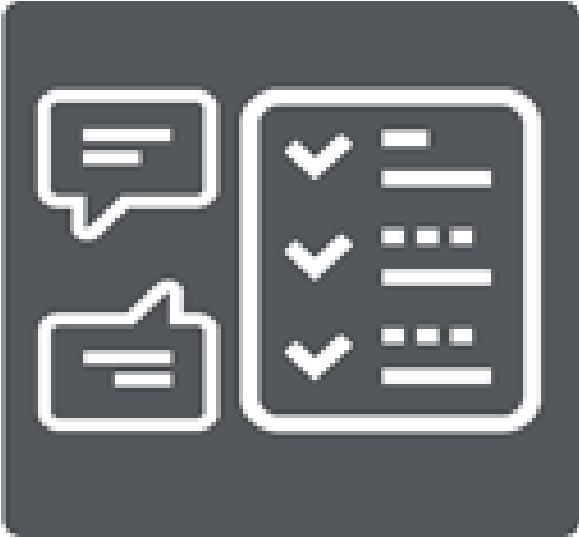
Transitional
Housing

Homelessness
Prevention

Emergency
Shelter

Services Only

CoC Program Components



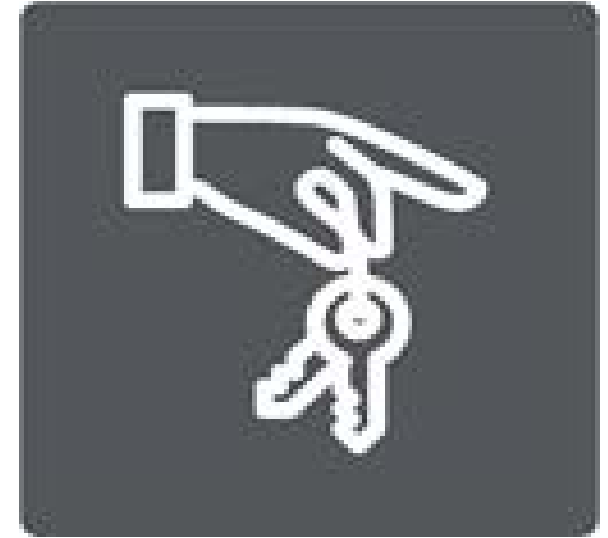
**Supportive
Services Only
(SSO)**



**Homelessness
Prevention
(HP)**



**Transitional
Housing
(TH)**



**Permanent
Housing (PH)**

- PSH
- RRH

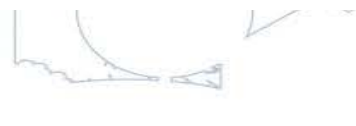
TH-RRH Joint Component

CoC Program Components

CoC Program Component	HMIS Project Type
Permanent Housing (PH)	PH: Permanent Supportive Housing
Permanent Housing (PH)	PH: Rapid Re-Housing
Supportive Services Only (SSO)	See SSO Chart Below
Transitional Housing (TH)	Transitional Housing
Homelessness Prevention (HP)	Homelessness Prevention
Safe Haven (SH)	Safe Haven
Joint TH and PH-RRH	Set up as two separate projects in HMIS: <ul style="list-style-type: none">• PH: Rapid Re-Housing• Transitional Housing

HOPWA Program Components

HOPWA Program Component	HMIS Project Type
Permanent Housing TBRA	PH – Permanent Supportive Housing
Permanent Housing Facility-Based	PH – Permanent Supportive Housing
Transitional Housing (TH)	Transitional Housing
Short Term Housing (STH)	Emergency Shelter
Hotel/Motel (H/M)	Emergency Shelter
Supportive Services Only not <i>in conjunction with housing (SSO)</i>	Services Only
Housing Information (HI)	Services Only
Permanent Housing Placement (PHP)	Services Only
Short Term Rent, Mortgage, Utility Assistance (STRMU)	Homelessness Prevention



RHY Program Components

RHY Program Component	HMIS Project Type
Street Outreach Program	Street Outreach
Basic Center Program – Prevention	Homelessness Prevention
Basic Center Program – Emergency Shelter	Emergency Shelter
Basic Center Program – Host Home Shelter	Emergency Shelter
Transitional Living Program	Transitional Housing
Maternity Group Home	Transitional Housing
Demonstration Grant	Transitional Housing ¹

PATH Program Components

PATH Program Component	Population of Focus	HMIS Project Type
Street Outreach	Persons who reside in a place <u>not meant</u> for human habitation (e.g. streets, abandoned buildings, etc.)	Street Outreach
Supportive Services	Persons who reside in a place <u>meant</u> for human habitation, or who are at risk of homelessness	Supportive Services

ESG Program Components

ESG Program Component - Activity	Continuum Project Type
Street Outreach	Street Outreach
Emergency Shelter – Shelter Operations	Emergency Shelter Day Shelter* Transitional Housing**
Emergency Shelter – Essential Services	Emergency Shelter Day Shelter* Transitional Housing**
Emergency Shelter - Renovations	Emergency Shelter Day Shelter* Transitional Housing**
Homelessness Prevention	Homelessness Prevention
Rapid Re-Housing	PH: Rapid Re-Housing

VA Program Components

Funded Component	Project Type #	Project Type Name
SSVF: Rapid Rehousing	13	PH - Rapid Re-Housing
SSVF: Homelessness Prevention	12	Homelessness Prevention
SSVF: Rapid Resolution	14 or 6 (determined locally)	Coordinated Entry or Services Only
HCHV CRS: EH	1	Emergency Shelter
HCHV: Low Demand Safe Haven	8	Safe Haven
GPD: Bridge Housing	2	Transitional Housing
GPD: Low Demand	8	Safe Haven
GPD: Service Intensive Transitional Housing	2	Transitional Housing
GPD: Hospital to Housing	2	Transitional Housing
GPD: Clinical Treatment	2	Transitional Housing
GPD: Transition in Place	9	PH - Housing Only
GPD: Case Management/Housing Retention	6	Services Only

Project Set Up Resources: Federal Partner Program Manuals

HUD HMIS Main page- <https://www.hudexchange.info/programs/hmis/>

General Information	Manual
Continuum of Care (CoC) Program	CoC Program – HMIS Manual Project Set Up Joint Component
Emergency Solutions Grants Program	ESG Program – HMIS Manual
Housing Opportunities for Persons With AIDS	HOPWA Program – HMIS Manual
Projects for Assistance in Transition from Homelessness (PATH)	PATH Program - HMIS Manual
Runaway & Homeless Youth	RHY Program – HMIS Manual
VA SSVF	VA Program – HMIS Manual



What does PDDE stand for ?

Top

		5			Project descriptor data elements
		0			PPP
		0			
		0			?
		0			Help..
		0			

PDDE's ?



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

Required PDDEs: Data Collection

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

PDDs 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

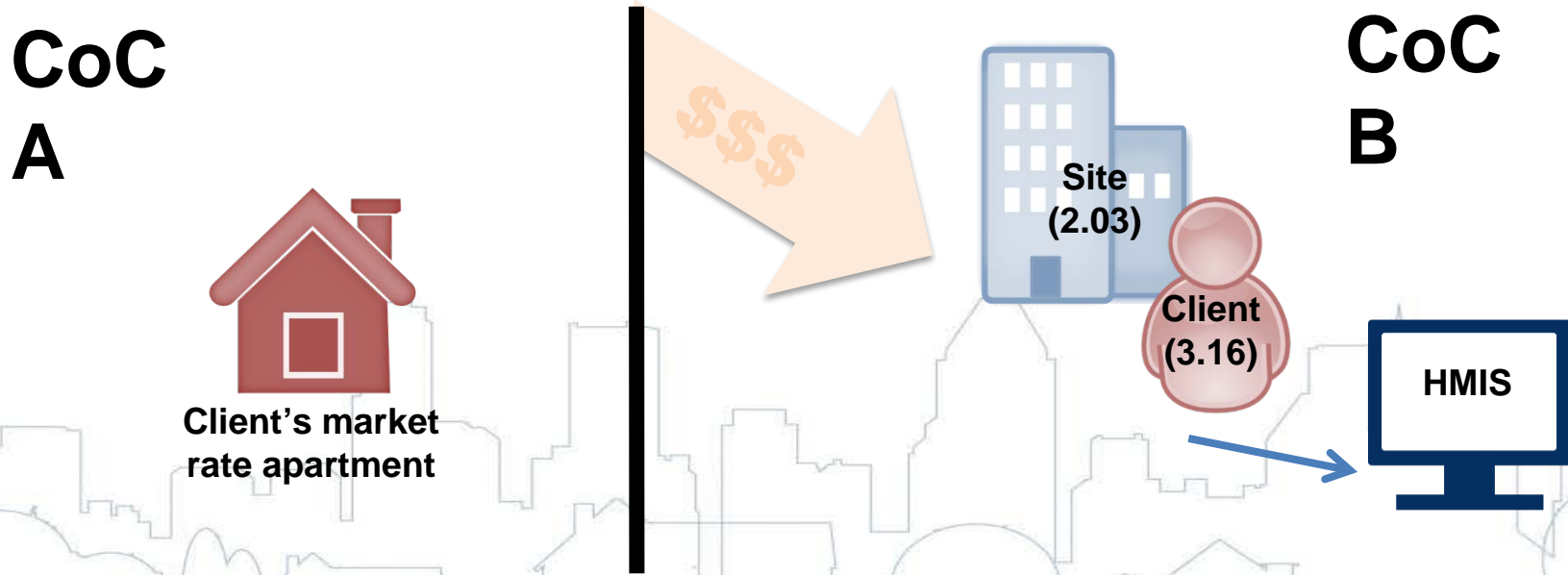
- Disabling Condition • Project Start Date • Project Exit Date • Destination • Relationship to Head of Household • Client Location • Housing Move-in Date • Prior Living Situation

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...

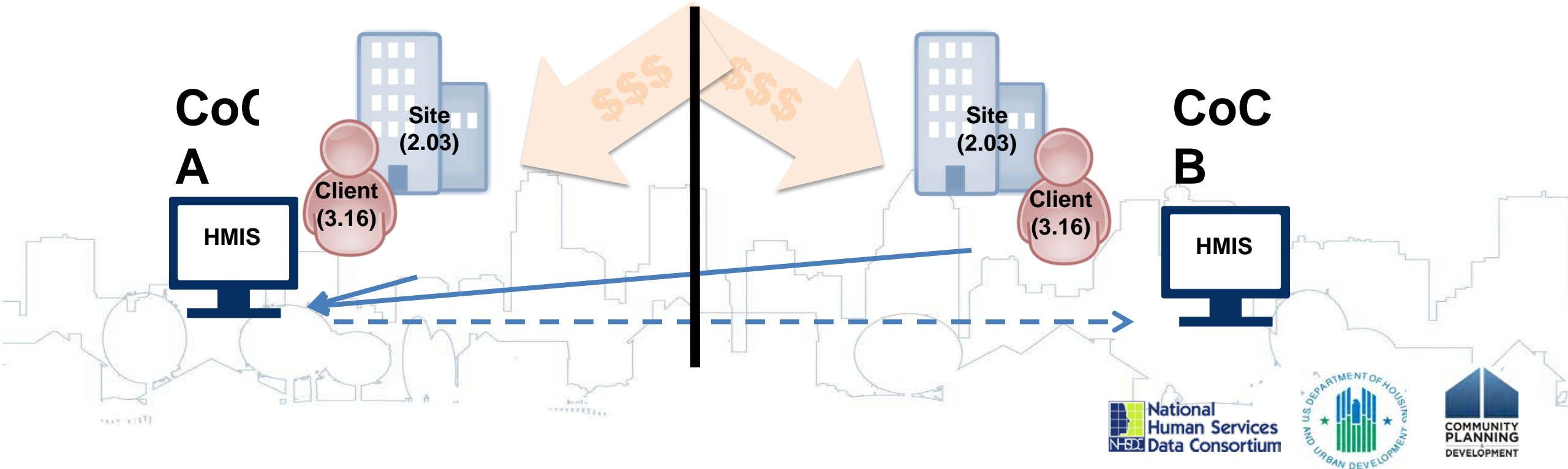
A note on 2.03 and 3.16

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!

Data Collection: Some Similarities and Differences by Program Component

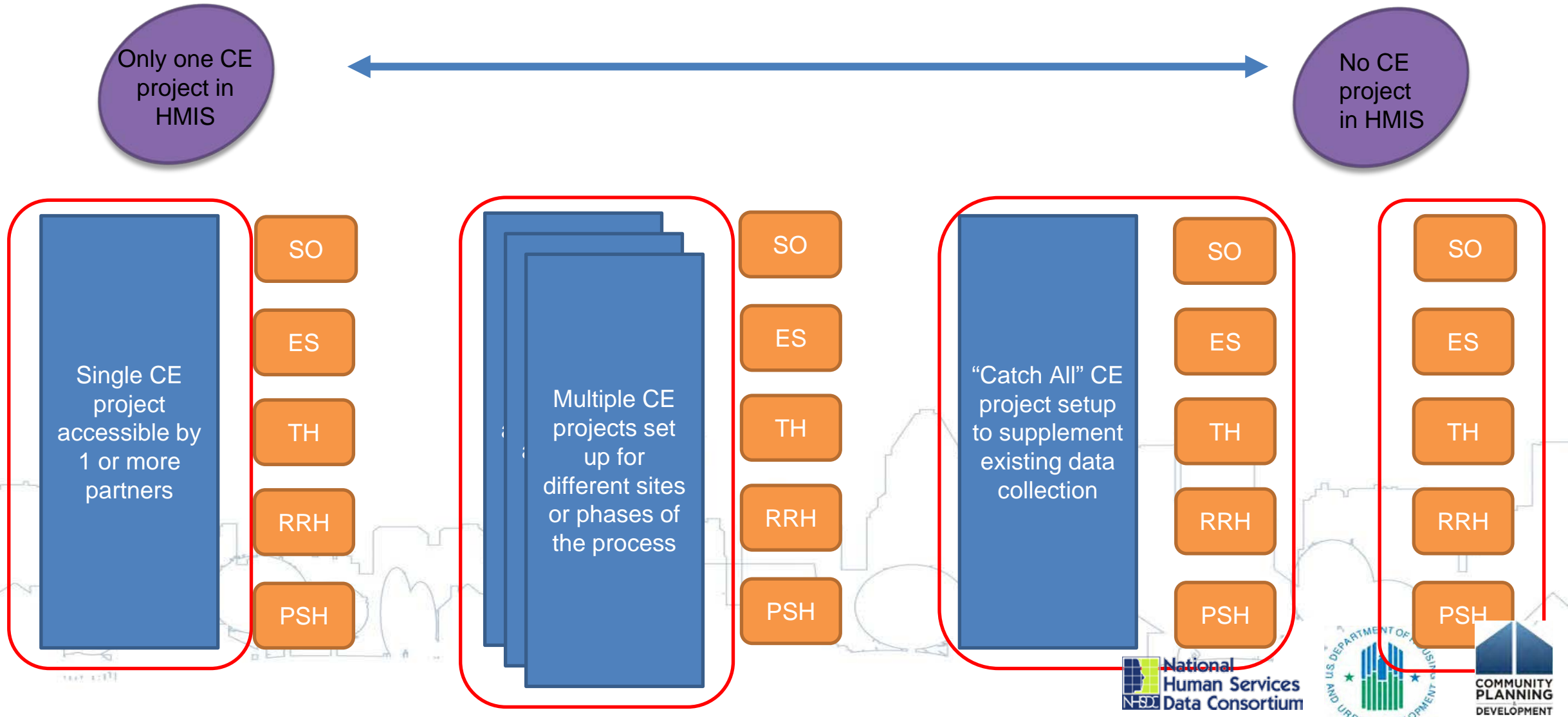
Common across Federal partners

- 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



Coordinated Entry Setup

Single Coordinated Entry Project in HMIS



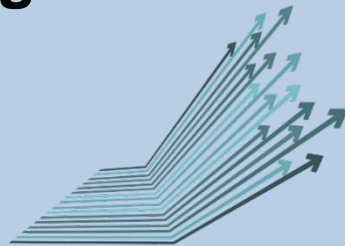
Triage

3.10
3.917
4.12
UDEs



Crisis
Assessment

4.19
Rest of UDEs



Crisis Bed
Referral

4.20



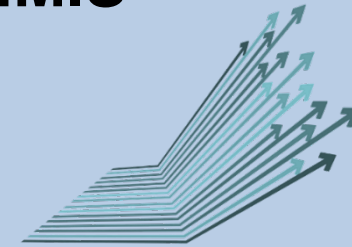
Problem
Solving

4.20



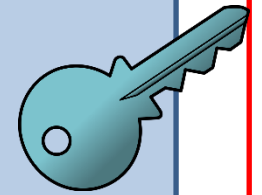
Housing
Assessment

4.19



PH Referral

4.20



PH Move-in

3.11
3.12

SO

ES

TH

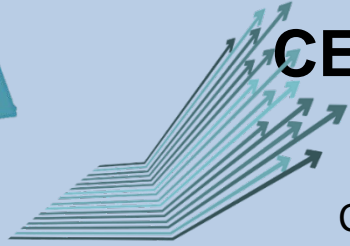
RRH

PSH

Coordinated Entry Setup



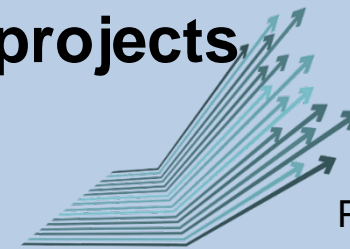
CE Project for non-participating projects



Crisis Bed Referral



Housing Assessment



PH Referral



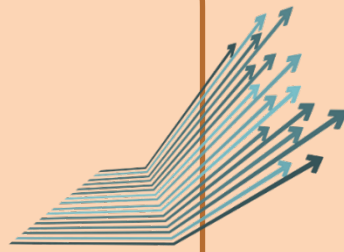
Triage

3.10
3.917
4.12
UDEs



Crisis Assessment

4.19
Rest of UDEs
Street Outreach



Crisis Bed Referral

4.20



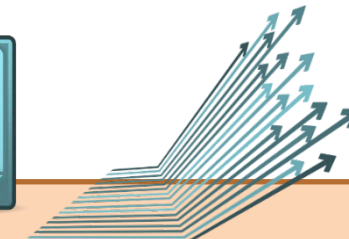
Problem Solving

4.20



Housing Assessment

4.19



PH Referral

4.20



PH Move-in

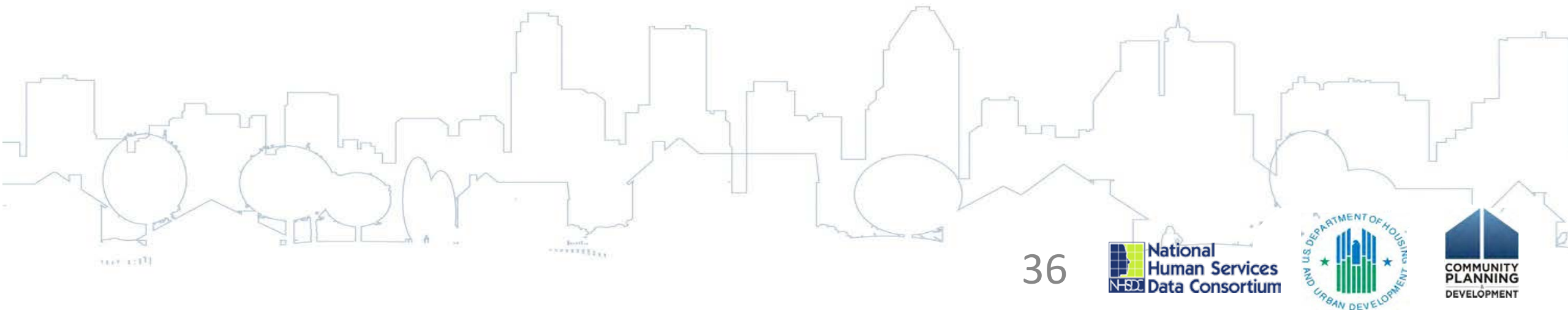
3.11
3.12

Emergency Shelter or Transitional Housing

Permanent Housing

Project Set Up Peer Learning – Using Chat

Do you have any insights or lessons learned around project set up and reporting that you can share with the group in the chat?



Poll

I have an organization with an ESG funded shelter and street outreach program. Can I set that up as one Project?

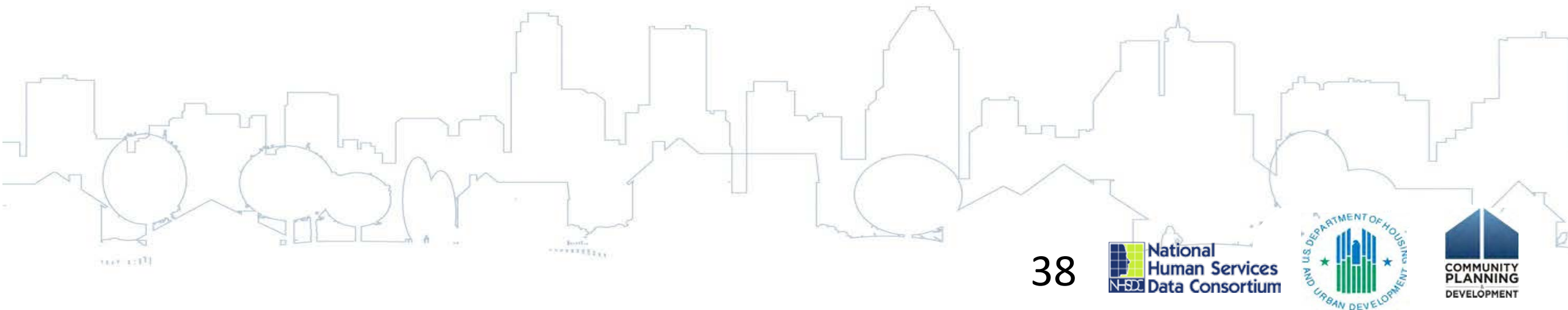
-Yes

-No

Poll

Are all projects required to collect UDEs?

- Yes
- No



Poll

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 HIC Organization Name	HMIS and HIC Program Name	Who Can Occupy these Beds?	Geo Code	Inventory Type	Bed Type	Target Pop. B	Funding Source	Beds HH w/ Children	Units HH w/ Children	Beds HH w/o Children	Beds HH w/ only Children
2012	501	PSH-D	Sample Org Name	Sample Program Name	Homeless Only (street, ES, car, abandoned building)	90726	N	V	None	HUD:CoC – Permanent Supportive Housing	0	0	5	0

Zip	County	City/Town	Site Type	Housing Type	Financial Service Account Yes or No	Start Date	Primary Contact Email	LSA/PIT	CAN	HOPWA

List The Users Who Will Need Access To The Program:		
First Name	Last Name	Email

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 Number	
GIW #	

If your project is HUD funded and will be part of your NOFA, please provide the Grant Number

IF RHY - Grant Number	
RHY ID	

If your project is RHY funded and will be part of please provide the Grant Number

Nutmeg Use	Date
Org Set Up	
Provider Set Up	
Project Set Up	
User Set Up	
Project ID	
Ticket #	
PIT ID #	

The 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?



HMIS Project Setup Tool

Project Name:
Select the appropriate Federal Funding Program & Component from the drop down list below. You may select more than one if appropriate.

Federal Program 1:	HUD:CoC – Rapid Re-Housing
Federal Program 2:	N/A
Federal Program 3:	N/A

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:

Funding Program 1:	Funding Program 2:	Funding Program 3:
HUD:CoC – Rapid Re-Housing		

Element	Required Element	Required Element	Required Element
4.2	Income and Sources		
4.3	Non-Cash Benefits		
4.4	Health Insurance		
4.5	Physical Disability		
4.6	Developmental Disability		
4.7	Chronic Health Condition		
4.8	HIV/AIDS		
4.9	Mental Health Problem		
4.10	Substance Abuse		
4.11	Domestic Violence		
4.12			
4.13			
4.14			

Project Set Up 201 session will cover more in depth example on how to use the [project set up tool](#)

Project Set Up Tool Scenario

Project 1 – CoC Rapid Re-Housing

Project 2 – ESG Rapid Re-Housing

HMIS Project Setup Tool

Project Name:
Select the appropriate Federal Funding Program & Component from the drop down list below. You may select more than one if appropriate.

Federal Program 1: HUD:CoC – Rapid Re-Housing
 Federal Program 2: HUD:ESG – Rapid Rehousing
 Federal Program 3: N/A

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: PH - Rapid Re-Housing
 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:

Funding Program 1:	Funding Program 2:	Funding Program 3:
HUD:CoC – Rapid Re-Housing	HUD:ESG – Rapid Rehousing	

Homelessness Prevention OR Rapid Re-housing projects that receive ESG funding from multiple jurisdictions must create separate projects within an HMIS for each jurisdiction (e.g., City-funded RRH and State-funded RRH) in order to distinguish program participants for reporting purposes.

HUD recommends that recipients and subrecipients work together to design projects that use funds from one ESG recipient to support 100% of the ESG costs for each household. Furthermore, HUD recommends against providing ESG assistance to the same household with two sequential funding sources, if it can be avoided. Instead, HUD recommends fully funding assistance for fewer program participants under the first subrecipient's project, and having subsequent program participants assisted by a second subrecipient's project.

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

Project Set Up Tool Scenario

Project 1 – ESG Rapid Re-Housing

Project 2 – ESG Homelessness Prevention

HMIS Project Setup Tool

Project Name:
Select the appropriate Federal Funding Program & Component from the drop down list below. You may select more than one if appropriate.

Federal Program 1: HUD:ESG – Rapid Rehousing
 Federal Program 2: HUD:ESG – Homelessness Prevention
 Federal Program 3: N/A

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

1st Component's Project Type: **Inconsistent program components!!!**
 PH - Rapid Re-Housing
 2nd Component's Project Type: Homelessness Prevention
 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:

Funding Program 1: Funding Program 2: Funding Program 3:

Element	Required Element	Required Element	Required Element
4.02			
4.03			
4.04			

**** 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:

<https://files.hudexchange.info/resources/documents/SNAPS-Data-TA-Strategy-to-Improve-Data-and-Performance-Overview.pdf>

- HMIS Lead Series Products:

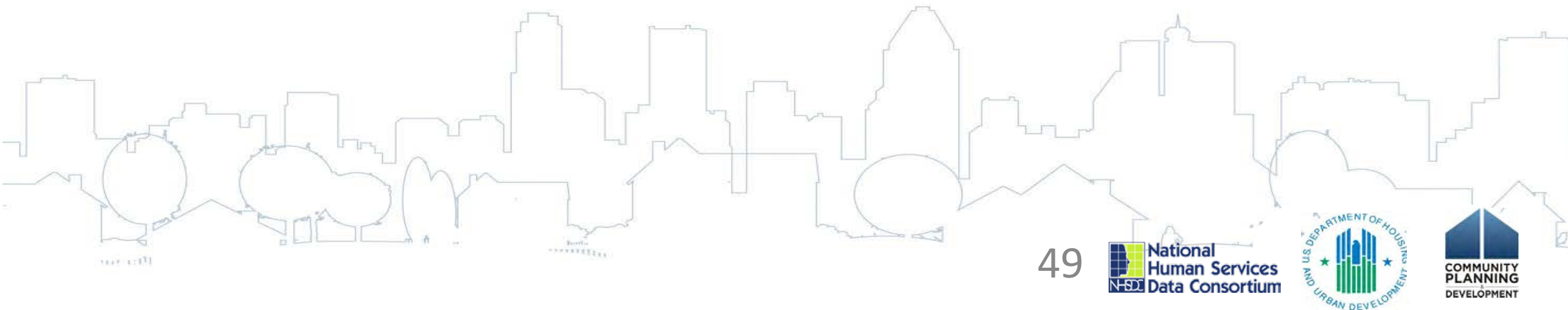
<https://www.hudexchange.info/programs/hmis/hmis-guides/#hmis-leads-and-governance>

- [HMIS Leads & Administrators Hub](#) – email hmis@cloudburstgroup.com to sign up

COVID-19 HMIS Resources

- HUD Resources and Community Examples:

<https://www.hudexchange.info/resource/5994/covid19-hmis-setup-and-data-sharing-practices/>



PDDEs 1

Multiple Funding Sources 2

New/demo funding sources 3

Multiple Sub recipients 4



Project Set Up
201 Session
Overview

**Common
Project Set Up
Challenges**

5 Project Type Changes

6 Project Closures, Consolidations & transferring

7 Reporting

8 Comparable Database



Resources



When in doubt, STOP and Ask A Question:

AAQ

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?



HUD Certificate of Completion

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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The Cloudburst Group
Brian.Roccapriore@cloudburstgroup.com

