HUD Exchange - HMIS Project Setup 201, 5/5/20

Joan Domenech: All right. Hi everybody. Welcome to "Project Setup 201." My name is Joan Domenech and I'm here with Meradith. We're going to be doing some formal introductions in a bit, but first wanted to go through some housekeeping items with you.

Our webinar today is going to last 60 minutes and you're in listen-only mode. We do want you and encourage you to use the chat box. So in the bottom of your pane, you're going to see some bubbles. There is one that looks like a word cloud. You want to make sure that that one is blue and that you're selecting all participants when you send those chats. If you do have technical difficulties, you can't hear us, you can send to the host presenter and they will work directly with you to figure those out.

A little bit about NHSDC. NHSDC has designed these types of conferences that allow homeless service providers to come together and share best practices and knowledge specifically around data.

I always remember my first NHSDC five or six years ago where, as an sys admin, you leave so encouraged and looking at so many ideas and although we're under virtual mode, we still want to encourage some of that. So use the chat, share ideas; learn. I always love learning a lot from you guys, and we hopefully you guys leave learning something today from this session.

All right, wrong, okay. What we're hoping to cover today, we had a 101 session yesterday where we covered the basics of project setup and that's going to be available and it's been recorded. But today we wanted to get into the challenges.

We've identified some of the top common challenges that we have with project setup and we wanted to dig deeper into those and give you some best practices on how you're going to be able to resolve those and then ultimately leave you with some resources so that when you're home and you're actually doing this, you can go back and reference those and fix them on your own.

All right. A little bit about me, Joan Domenech again. I am part of the federal TA team for Corporation for Supportive Housing. I do a lot of work in data quality, HMIS and prior to that, I worked locally in Central Florida and was their HMIS program manager and coordinated entry program manager there.

All right. Meradith? Can't hear you, Meradith.

Meradith Alspaugh: Okay, double muted. Now, we got it.

Hi everyone. I am Meradith Alspaugh. I am from the Partnership Center. We're located in Cincinnati, Ohio. Our primary focus with technical assistance is related to operating the HMIS data lab. That means we do a lot of work with system administrators, HMIS software providers. Those of you that do the monthly sys admin calls, you've probably seen or heard me before. We also operate Sage, so we do a lot of the backend kind of work.

Prior to my work with the Partnership Center, I also worked in a CoC. I've done everything from case management, HMIS data entry through program supervision, CoC leadership. So I've got a pretty wide range of past experience. It's great for you all to be here. We're really looking forward to talking with you and like Joan said, hopefully you all can get some good information out of this session two.

Joan Domenech: All right. So we are going to -- I'm not going to read through all of these but wanted to start you off with some important project set up reminders and I'm going to highlight some that my experience has just -- they've proven to be super helpful. And one of them is having an onboarding procedure.

Yesterday, we covered this and if you're looking for an example, you can go back to that session Project Setup 101, but what on boarding procedure means is when you're bringing in a new HMIS agency, what does that process look like of actually onboarding them, creating a project in HMIS? And that starts way before you actually get into HMIS.

It starts by having those communication with the CoC lead, that communication with that specific agency, knowing exactly what information, what questions you're going to ask in that initial meeting and just having a clear process so that when you're actually setting the project alone in your desk, that you have the information you need to set it up correctly and don't have to go back or don't set it up incorrectly and have to go back and take time and say oh this probably wasn't set up correctly.

So that's one of the ones that I really like highlight because it's just so important and saves you a lot of headaches. The other one that I want to highlight is using the available project set of resources. There's a lot of resources out there. We're going to be covering some of them today and you'll have a lot of links.

But when you do have questions, like when I look at these manuals every time I set up a project and maybe I don't have the best memory in the world, but it's so helpful to go back and reference them. So you will have these slides and I just wanted to quickly touch on those too because we did cover so much of this on the Setup 101 already.

All right. So talking about resources, here's a bunch of them. The first resource at the top of the page is the HMIS landing page. That is one of my bookmarks. And if you do not have it bookmarked, you should. This is like that first place you want to search for anything HMIS related and then you have the different six programs and you have the manuals for each of them. And then in the bottom, you also have the new interactive standard, data standards tool.

All right. So this is what we're going to be spending basically all of our time today. We have identified these eight common challenges, project descriptor data elements and how do you set those up? How do you set up a project when they have multiple funding sources, multiple recipients? How do you really look at project closures and consolidations and transferring? What are the different methods that you're going to be able to do? Reporting and then comparable database.

And so we've layered our entire presentation around these and we'll be touching on them KI think in that order. All right. So PDDEs, virtual candy to whoever can tell me what that is in the chat. I can't see the chat, but I'm sure somebody will get it. Let's see. I can't look at the chat right now, but it's project descriptive data element.

There's too many things going on on the same page and project descriptive data elements -- the way that I like looking at them is are really used to collecting data on people, on persons, and we know that we create an assessment and we ask the questions and that leads us ultimately to a report of persons that we already had pre-populated because that's how we designed our assessment. So PDDEs is that kind of same thing, but it -- there go. Mina got it. I got that portion of the chat.

PDDEs is very similar but what you want to collect on the project and our HMIS is built on a project and project types and they're truly the building blocks for PDDEs. And so it's almost like you when you're building a building, you don't want to start with a bad structure. You want to have a solid structure and that's what the project descriptor data element. It doesn't matter how good you do everything else, if your projects are not set up with the right structure, your reports are not going to pull correctly.

You're going to have all sorts of flags. So I'm not going to read the slide to you. But there's a lot of information that we collect. You collect the funding sources. You collect the geocodes, the different CoCs, where they're at. And then you collect bed and inventory information and it's basically all that information around the projects that we want to know about.

So that's a little bit about that. And we'll talk more about reporting later on but the idea is that for our reports to work, these have to be set up correctly. All right. So we're going to do some pop quiz poll types and you should see to your right of your screen, the poll and they're all around project setup.

So our first poll and we'll give it a few seconds before we close it, is if there are different bed units and bed types for projects. For example, one has a bed type facility bed. And the other one has a bed type that is voucher bed, should be these be separate project setups in HMIS? So yes or no.

Nicole: The poll will be closing in 20 seconds.

Joan Domenech: We do not see your name so feel free to vote without being afraid. All right. So 60 of you answered yes and 22 answered no. And if you answered yes, that is correct. You do need to set up two types of project setups because they're two different bed types. So for example, if you have an emergency shelter that serving -- has 100 beds and they're serving single adults, but 20 of those beds happen to be seasonal, you would have two project setups, 80 for the regular beds and 20 for the seasonal. So if you answered yes, that is correct.

All right. So let's go to the second poll and Nicole, we can just give it 20 seconds from now. I'm going to read off the question. I have a tenant based rental assistance project that is funded to operate in CoC A but sometimes, which sometimes is bolded, people are housed in CoC B because of unit availability. Do I need to enter more than one CoC code in 2.03, which is the CoC code in the PDDEs? I don't think we gave that enough time. Yeah, we did not give that enough time.

All right. So the answer is no. You do not need to set up different projects with a different CoC code if it is -- sometimes when you do need to set up different projects is when you're specifically funded to provide services in different areas. And we have an example of this. Sometimes you have the occasion where you have to serve in multiple places and the -- sorry, I'm reading chats. It's not good.

And what you do is you could do that entering data in both HMIS if you're supposed to be funding and providing services in both areas, or you can think of some export import data technology solution with the proper agreements in place. But if it's just randomly that sometimes you happen to place people in this other CoC because that's just where the units are, then you do not need to do two set ups.

All right. We'll do the other one and we will give you more times this time. All right. So do I need to update bed and unit inventory information each time there is a change in bed and/or unit?

Nicole: The poll will be closing in 20 seconds.

Joan Domenech: All right. So a lot of you answered yes and the correct answer is actually no and we'll give you some examples. So you would only need to update that information if there are significant changes. Maybe that was a trick question and significant can be kind of gray.

So we have this table here to kind of talk through what examples of what significant changes could be. So the first one is an emergency shelter that originally had 10 units with 20 beds and a large family is now in there and they're actually serving 25, which is five over what they would do and this is actually one of the cases where you wouldn't have to update because it's a minor fluctuation. It's something that's temporary.

So for this particular example, you wouldn't have to do those updates, but for the second one, a fire happened in a PSH building and instead of 20 units now they have 15 units. And because of the severity, we don't know when the units are going to be available again. So in this case, you would have to update the inventory, create an end date and start a new bed inventory for the 15 because we don't really know if or when the five units will become available. So this is one of the cases where it is significant and you would do those updates.

And then our last example is a PSH project that has 15 beds and because of funding, now they can only operate five. So because of lack of funding and this is going to be something that's ongoing, you would end inventory and start a new one for the five remaining units.

So that was kind of a trick question, but you really have to take it on base by base and if it's a significant change that is going to be ongoing, then you would want to update. If it's just like that first example where you have a family or a few families and you happen to be serving a little bit more than you normally, then that would not require that type of change.

All right. So I think it's Meradith.

Meradith Alspaugh: Yes, I want to pause real fast. So there was a question that came in and I want to make sure that we're clear on this. The question about if you need to set up two different project types for two different inventory types and the answer was yes, so if you had facility beds and voucher beds, you need to set up two different projects. I think though the question is about the example that you gave where maybe there were seasonal or overflow bed in a single project

And in those cases, I actually don't believe you would need to set up two different projects for overflow beds. It would only be if they were a different type of bed. So if you have let's say a facility that you typically have 100 beds and but in the winter, you open up 20 more beds within your facility, you would not need to open a new project in HMIS. That would be the same project because those bed types aren't changing. If you were to have a hotel or some other type of project, then in those cases you would need to set up, or I'm sorry, some other type of bed type, you would need to set up two different projects. Is that correct, Joan? Your understanding?

Joan Domenech: Yes.

Meradith Alspaugh: Yeah, I think there was maybe a little confusion but I just want to make sure that we got that cleared up. Okay. Thank you. Okay. So let's move on thinking back to that list of challenges that Joan showed earlier. We're going to start with talking about challenges around multiple funding sources. So I think you all know this and this might be a repeat for some of you, but still important to point out. A single project can have more than one funder. It's going to be important that you are making sure that, sorry, I'm reading the chat also.

You're going to want to make sure that those funding sources can actually be combined in a single project. There are a variety of different sort of rules around when projects can have a single project, can have multiple funding sources. Often you can, but there are some specific examples when you cannot. So a specific example is with ESG funding. You shouldn't mix multiple ESG funding sources into a single rapid rehousing project or a prevention or street outreach project.

And I should have put a big asterisk next to that because they're like with everything are often exceptions. If your HMIS has the functionality to separate out clients in a combined project, let's say for each ESG jurisdiction, then you can combine those funding sources, but it is not a data standards requirement that a software be able to do that. So we write -- HUD writes the rules and then if your software can make something else happen, that's great. But the expectation is that you would be able to report on the clients by funding source. So that's a specific example around ESG.

If you're not aware yet, there is a project setup tool. This is a tool that HUD releases and updates every year. We'll get the link to it put out in the chat, but the project setup tool is a resource for sys admins to be able to look at whether or not different funding sources are compatible. So whether or not you have like an SSVF rapid rehousing project and an ESG rapid rehousing project. If you were to select those two options in your federal programs, they would be able to be mixed together.

And the way that the project set up tool works, ad unfortunately, we don't have a great platform for actually doing a demo with this but you would select, these are drop-down boxes. This is an excel-based tool. You would select the different Federal program. It would indicate to you whether or not it was an allowable combination and it would tell you what the project type must be and then you can see under these green and blue headers here, it would indicate all of the different funding sources that are required or I'm sorry, all the different fields that are required to be collected based on those funding sources.

So you would want to make sure if you're setting up a single project that you have all of those different funding sources or fields, I'm sorry, together based on the funding source. Also, you know when you're thinking about these multiple funding sources that are coming into a single project, sometimes those funding sources may be restricted to paying for only particular type of eligible activity.

Sometimes you might have a grant for rental assistance or leasing costs and another grant for services. In those cases, you have a couple of options. You can create a single project in your HMIS that both the housing provider and the service provider would be able to share and record data in or you would have the option of creating two separate projects, one for the housing provider and one for the service provider

A couple points to make sure that you're thinking about what those two options. If you do option one and you set up a single project, you're going to have to make sure that your privacy and sharing allows for that data to be shared. Right? Like, you're going to have to ensure that both projects are able to access that single project.

You're also going to want to make sure that the project type is accurate using the appropriate residential project type. So if you had a services grant and a housing grant mixed into one project, you're going to want to set it up using the residential project type. You're also going to want to make sure that you've got both of the funding sources, the federal funding sources identified within that project, within those PDDEs.

If you go with option two and set up two separate projects again, you might need to do this if you have a scenario where maybe you have a victim service provider is providing the services that go along with a residential project or there's a [inaudible] grant that is going for the services and that data can't be opened in the system. Different reasons for why you might do this, but if you do that, you're going to need to make sure that you've got the residential project type setup and that you've got a services only project setup and then you can affiliate that services only project with the residential project

Again, that's going to be in your PDDEs. So back to sort of Joan's point at the beginning, like those PDDEs are really critical to making sure that you've got a strong solid foundation for your project set up. So when it comes time to do reports, you're going to know which reports are going to be required for those particular projects.

Another common challenge and we've heard a lot about and sorry the formatting on this slide is a little funky, those of you that have youth homelessness demonstration programs grants in your communities might have already experienced some of this. The YHDP program is innovative. It's intended to be different. It's intended to prevent and end youth homelessness and lots of communities that have these YHDP projects are creating new and innovative ways to do this, to achieve their goal, right, because this is a demonstration grant, they have the ability to be a little more creative.

It's going to be really important that HMIS system administrators are working really closely with the YHDP recipients, the agencies that are operating these projects to make sure that the projects they're applying for are projects, what just happened here? Sorry about that. You'll want to make sure that these are projects that they're going to actually be able to collect the data required and then be able to report at the end of their operating year that data.

In many cases, the YHDP communities are selecting or opting into collecting runaway homeless youth, RHY data elements in addition to CoC program data elements. This can also present a challenge with collecting different data for different project types.

And the other thing that I want to point out with YHDP communities, if you haven't heard already, they also have to report on this RHY data. They also do what we call supplemental reporting and that's really going to be critical for when thinking about project set up to make sure that you've got the accurate project types in there because of the amount of reporting that these projects are doing based on project type. It's going to be really critical to make sure that those are in there correctly.

Just quickly on a specific example. We know that in YHDP and in a lot of youth programs right that host homes are a hot topic. Lots of folks are doing host home. Host homes is not a project type. So it's going to be really important for you to think through with your agency's if you're a system administrator on what actually their program design looks like.

And I know you probably do a fair amount of program design without even realizing it, right? Like is this a temporary -- is this more of a transitional housing model? Is this more of a permanent housing? So really having those conversations and working with those recipients to make sure that when they're thinking about their program design, you're sort of pushing them along with that so that when it comes back to you to set this project up in HMIS, you're able to set up the right kind of project.

The other question we get a lot and the other challenge around project setup is related to coordinated entry. And again, maybe preaching to the choir here, but we want to just talk a little bit about this today mostly, just really briefly because those of you that haven't heard this already, the implementation deadline for coordinated entry has been pushed back again until October of 2020.

there's not a standard setup. There are a variety of ways from having one and only one project in HMIS, which is pretty clear. You have a single project that everyone has access to and then you can go all the way to the other end of the spectrum where you don't have any coordinated entry project. You just collect coordinated entry data elements in all of your projects.

There's again not a right or a wrong way, which is good and bad because it can be challenging to figure out then who's collecting what? When? Where your reporting lines get drawn, et cetera.

So what HUD's really trying to do with coordinated entry set up in HMIS is give flexibility to communities to not sort of break what you've already been doing for the last several years, but to sort of put some structure around it and to make it a way that communities are able to ultimately be able to report on the data that's collected for their coordinated entry projects, be able to analyze the effectiveness of coordinated entry, hopefully streamline and continue to improve coordinated entry, but we know this is a challenge.

And I would encourage you if you're not already to get on the HMIS system administrator calls, submit AAQs. HUD is committed to providing resources to help support communities with getting the implementation of coordinated entry in HMIS, right. So if you're needing more help with that, please don't hesitate to reach out.

The next one I just want to quickly talk about is multiple subrecipients. So we know that there are times when one grantee gets an award and then sub-awards that funding to different agencies within the system. It is an allowable thing to do. It's important to remember that when it comes to running reports, so let's say like a permanent supportive housing project has multiple subrecipients. When it comes time to do that APR in Sage, it's going to be important that the report is being generated across all of the subrecipients if possible.

There's obviously going to be an exception for those victim service providers participating in a comparable database, but in general in an HMIS if you have one grant, but four sub-recipients, when you come to doing your reporting you can submit a single CSV APR so that you can duplicate the data within your system and submit just one CSV instead of multiple CSVs for all of the different subrecipients.

Okay. The next point I want to talk about is around project type changes. This is pretty infrequent but when it does happen, it does certainly cause questions. We know that sometimes field offices permit project type changes to occur through grant amendments. We want to highlight a couple of things that we want to make sure you're considering and we want to make sure that as system administrators that you're communicating this with your grantees and vice versa.

Before making any sort of project type change, it's going to be really important to have the appropriate documentation from the HUD field office that allows the change. So when it comes time to do a report in Sage, if Sage is expecting a permanent supportive housing project, but you have amended your project to be a rapid rehousing project, you're going to need that documentation from your field office that says it's allowable to operate as a rapid rehousing project.

If you're making these types of project changes, it's going to be really important that this is happening at the right time. Ideally, it's happening at the end of an operating year, not in the middle of it, so you don't have two different project types operating at the same time. Changing a project type mid-year is going to pretty significantly potentially significantly impact the data being collected. For instance, you won't have a housing move-in date, if you're supposed to have a housing move-in date or you may not be collecting different data that are required based on the project type.

I want to bring this up as a word of caution more than anything. Like I said, it doesn't happen a lot. But we want to make sure if it is happening that it is happening in a thoughtful and planned out manner so as to minimize the impact that this change is going to have on your system.

Also I want to talk a little bit about consolidation. So grant consolidations. This really started happening back in the 2018 CoC program competition. It became more commonplace I suppose in the 2018 CoC competition where grant recipients had the option to consolidate up to four eligible renewals into one grant.

In 2019, HUD released a document called "A Blueprint for Understanding How they Work" related to these consolidations. There's a lot of really helpful information. And once these slides come out, there is a link there. There is a lot of really good and helpful information that those of you that haven't seen it yet, I would strongly encourage you to take a look at that.

HUD's also been working on some updated guidance too because they recognize this is from 2018. We're getting into 2020 here. So they're working on updating that guidance and providing some additional guidance too about how to handle project consolidations, closures and transfers. I would say this is a question we hear a ton on the AAQ desk. Really what do I do with these records when my grant closes or consolidates or transfers? So this document isn't quite out on the HUD exchange yet, but we can talk through the general content of it because it should be getting posted very very soon.

So let's start with talking about consolidation. There's a lot of different options for handling these grants that are consolidated. HUD has not necessarily taken a stance on a preferred method until now and really what the preferred method is is to administratively move the entire client record from the old project to the new project. So if you have two grants that are merging together and you need to get all of those records into a single project, they really don't want to see clients being exited from one project and entered into another project.

Exiting and re-entering clients is -- I don't know what the right word to say here -- it's not ideal because it can negatively impact the data and show things that aren't actually true. Right? So it looks like the length of stay in a particular project maybe was shorter than it actually is. You're going to lose information about income changes if you exit and re-enter the client so really the goal would be to do this administrative move, but we're going to walk through here a couple of different options.

So here's the first one I just kind of talked about. Administratively moving the records. So you're going to pick the surviving grant in your system, the surviving project and you're going to have -- maybe it's your vendor that has to help you with this or maybe you can do it yourself. It's going to vary based on your software, but one way or another moving an entire record from one project into another project.

A couple, yeah, so you'd pick up the entire client record and move it into the new grant, the new project. So that's one option. These slides aren't moving.

The second option would be to reassign the project to the new recipient in HMIS. So using this method all client records from the project are given to the surviving project simply by reassigning the project to another organization in HMIS. There's a couple points that you want to make sure that you're thinking through with this issue or with this option. The option could be the right one for you if your software doesn't have the right functionality to move client records or if the cost of moving the records is prohibitive, but it's going to be important to make sure that your privacy and security policies at the CoC level aren't being violated if you move records in this way.

You're also going to want to make sure that the data that you're moving from one project to another or the data that's being transferred to another project is the right data because once -- it could be that case notes if you're keeping case notes or client documents or things like that, those might be things that don't need to go to the new recipient when this project is switched.

So you're want to make sure that you're taking a look at the data that's in there and the appropriateness of switching that data. You're also going to want to make sure that the recipient that is giving up this project has run all the reports they need to run, has done what they need to do because they will not have access to that data moving forward.

If you're going to do option two here, we lay out the different steps that would be required, changing the organization information. You would not change the project ID or the project type if the CoC code changed which it shouldn't. That would be updated. You would add or edit the new grant identifiers and then update the bed and unit inventory as of the date the consolidation or transfer occurs. So you're going to want to make sure you do that on both the terminating project and the surviving project.

The third option is going to be again, the one we talk about is sort of the least ideal situation is exiting one client from one PH project and starting them in another. In this method, all of the historical data stays in the terminating project and you would start in the new project with information as of project start. So this is going to mean that when you record an enrollment for a client in this new project, you would indicate that they're coming from permanent housing, that they maybe weren't living in a literally homeless location.

This will impact your new project enrollment's ability to report that person chronically homeless if they were considered chronically homeless at project start in the first project. You're going to, like I mentioned earlier, you're going to lose information about changes income, changes in benefits. It's going to potentially change the annual assessment date. There's a lot of potential sort of dominoes that happen right when you decide to exit a client and re-enter them.

So again, this is discouraged. If you do do this, if you do have to exit and re-enter a person when you do the APR submission on this project, you are required to note that in your APR so that when your APR is being reviewed, the reviewer will see why it may appear that like your project is serving people who aren't coming from literally homeless situations or your project isn't serving maybe the chronically homeless count of people it was supposed to or different scenarios like that.

And then finally the last option is leave them alone. So there isn't necessarily a requirement that they would need to have any changes in HMIS, particularly if a single organization is operating both projects where this grant consolidation happens. Similar to what I was saying before you could leave the clients in two separate projects in HMIS and then when you generate the APR, just run it across both projects.

So you can run a single report on two projects. That's the least expensive way to do it. It may not work if it's happening across multiple organizations, but it still could work if it's happening across multiple organizations. Again you just need to make sure the HMIS sharing and security settings are -- that they would allow for that so that the recipient would be able to generate that report of if a system administrator had to be involved that you could properly prepare for that.

So like I said, there is an actual couple page piece of guidance coming out with all of this information fully articulated in there so this was sort of just a quick high level overview. Please make sure -- we'll post an announcement to the sys admin hub if you're if you're not already on there or it probably will get a listserv, but I'm not sure. You'll see it on the HUD exchange. We'll make sure that we let people when it's out there.

So it looks like there was some questions. Joan, do you want to [inaudible]?

Joan Domenech: One for you, but I'll address one of them. It was about consolidation, but there was one on project setup and collecting the required information when you're onboarding an agency and I looked and I saw some peer sharing and people were kind of answering each other's questions and then sending a form. The form coming back blank.

So I do have some suggestions. Sometimes we tend to speak HMIS which has a lot of acronyms and a lot of words that are just hard to understand. So one of the suggestions I always have is you have to put yourself in almost like an HMIS to normal language translator mode. And when you create these types of forms, it's good that you know that it's the geocode or it's the funding source, but try to really make the forms for your audience. So really like the name of the agency, make it in sentences where like there's no confusion on what you're asking for.

So that's just one suggestion. I also think like meeting with the right person. I saw that somebody was meeting with their HMIS point of contact. So sometimes, it's not the person that's going to know the grant information is not necessarily the contact person that you have or the person that you have as your HMIS reset passwords and all that type of thing. It's a completely different person. So once you're doing project setup you want to really meet more with like the person that wrote the grant or the person that is the ED or that type of person.

So those are two suggestions. I was super-happy to see that you guys have forms that you're doing some of those processes. If anybody else has any suggestions, please type them in the chat so we can all share that. But I think like those two have been helpful for me because I've been in that position where I've just sent forms and people don't understand. It's the same for housing inventory count and a lot of people don't speak HMIS and we can't expect them to. So just really target that language and see if that yields results. Do you have any suggestions, Meradith?

Meradith Alspaugh: I would suggest for -- especially with like a CoC program ask for the application. Right? Like you can see that they write out a description of it. They have to identify a project type in the application. They identify at least for the funding purposes the number of units so that can help you get a little bit further too. If it's a partnership with another maybe a private funding source or something asking for like the reporting requirements from funder, it might be helpful in helping you make sure that you have all of the right information when it comes time to do the report.

Joan Domenech: I found going -- we were kind of looking because we were the CoC and we have the grants department and everything. So we just went and used the grants and started getting those so that's super helpful as well. We have a question from Rosie that related to a consolidation. She says I don't believe as a system admin I have the ability to move a client record. What other option is there?

Meradith Alspaugh: Yeah, it's if that's not an option for you, then I would consider looking at one of these other options around either reassigning the project to a new recipient by changing the PDDEs or leaving the project in HMIS as it is if that's an option or if you just can't do anything else, I mean the option of exiting and re-entering is still on the table. It's just not the first choice. It will break your data so to speak so to the extent that you can keep that longitudinal and historical data together, that would be what HUD would like to see but if you can't do it you can't do it. You'll just need to make sure that it's noted for reporting purposes.

Joan Domenech: All right. So if you look at the top there's a few suggestions. There's even a person sharing the PDDE request forms. So take a look at the chat.

All right. So I'm going to move us forward. I think you have to move it Meradith because it's just one [inaudible] we don't have to change. There you go. All right. So reporting. One back.

So reporting, so we don't want to -- I think we've talked a lot about reporting and how everything that you do around project set up matters and so I didn't really want to spend too much time here other than suggesting that it really is going to help out if you have some type of process for identifying issues in project setup before you have to submit your LSA or before you have to submit any of these reports. So thinking about that we have an activity later on where we'll try to share some best practices around that.

But if you don't have a process, maybe that's something that you put in your very long to-do list of things to explore is having a process to identify those project set up issues. Another thing that I wanted to highlight is because we're moving to actually using data now, like we're not just entering data. There's every report that we've mentioned today is pulling directly from your project setup. It's pulling directly from your HMIS.

A lot of the reports like Sage are just not going to accept the report if you don't have the project type selected the correct one. RHY, the same thing. But it's not just about submitting to HUD and just checking that box. The reports that are out there are super cool and some people might not think so, but Acela PE and SPMs and APR, there's a lot that you can do with those reports and really maximize the use of them and you can't really do that if your data is not accurate and you're not doing the correct project setup.

So I would just really encourage you to take another look at that report and really focus on your cleanup. Project setup is almost the version of data quality for you as an HMIS system admin that we require from our users sometimes and you want to have some type of process where you're checking your data quality and your accuracy in terms of your project set up.

All right. That's all I wanted to say on this slide, Meradith.

Meradith Alspaugh: Okay, thanks. I want to talk, oh I actually -- I want to say -- or I want to answer this one question that I saw in the Q&A box because it's related to the set up stuff. We have an ROH project with different local funding sources. Each project or each funding source has its own project.

The providers are frequently exiting and re-entering clients to move them between those two programs as funding fluctuates. What are best practices for that setup? And I wanted to tackle this one because we struggled with this and this is a question that we get a lot also and we've had numerous conversations with HUD about this topic and I think that there's still an FAQ out there. I'd have to research it. I think what HUD would suggest is to reconsider how those projects are designed and make a project where 100 percent of someone's needs can be met within a single project.

So rather than going from one agency to get deposit assistance; to another agency to get three months of rent, and then to another agency to get another three months of rent, take a look at the project design and I know as system administrators, that isn't necessarily your role, but that's something that perhaps in these conversations that you're having with CoCs, you can be discussing and talking about thinking again about project design and making a project that makes sense, right, and isn't going to negatively impact your data for your system.

Because having multiple entries and exits from multiple ROH or PH projects, it's going to do weird things to your data. So you want to make sure that if someone's really just in a single project regardless of who's paying for what that they're reflected in your data that way.

Joan Domenech: Okay, before you jump into that one, you have a consolidation question. So she carries out the four options for consolidation, applies for transfers where a project entirely moves from one agency to another agency.

Meradith Alspaugh: Yes, I was actually starting to write that answer when the slide switched to me. So yes, those options are applicable for those scenarios. Okay, so let's talk a little bit about comparable databases. And I know this is always kind of a tough subject to because who's in charge of comparable databases? We know that system administrators have the knowledge and the expertise for operating an HMIS, but we also know that their comparable databases don't always fall under the purview of the HMIS system administrator, so we know that there's a disconnect there.

We know that there's just sort of rules so to speak for how those comparable databases interact with the system. However for it to really be a comparable database it needs to be functioning exactly the same as an HMIS, meaning it can collect all of the data standards. It can meet all of the privacy and security requirements and that it can produce the reports that are required. So meaning an AP/r, a caper, a CSV, all of the different requirements in place for an HMIS apply to comparable databases.

So we know when we see reports coming in for Sage, we see it a lot in the caper that project setup isn't being done correctly in comparable databases, that project codes or project identifiers or project types aren't necessarily being used correctly. So we just want to make sure and again I'm probably preaching to the choir here for a bunch of sys admins on this call, but I just want to put the plug out there to the extent that your community is able to support the victim service providers using comparable databases with the expertise of the HMIS lead or the system administrators, that's going to be really helpful for your comparable database users for the victim service providers.

So just sort of I guess more than anything acknowledging that this is continuing to be an issue and to the extent that you can provide your expertise as system administrators and support knowing full well, it's probably a different software. It's probably a different whatever but maybe sharing some of those tools sheets that you're coming up with or different things like that so that the systems are able to be set up accurately. It's going to be really helpful for your community as a whole.

Moving on I think to the last slide here, Joan, I think this is you again.

Joan Domenech: Yeah, so we've already seen a lot of this. You guys have been sharing stuff in the chat and links and we really appreciate that and we want to just continue that and one of the things we talked about was doing those proactive check for your required reports to see if you have project setup issues. So we wanted to see if you guys had any best practices things that have worked for you, lessons learned, real ways where you're looking at your project setup proactively.

So you have any comments, suggestions, anything that you're doing just type them up in the chat. While you guys share, one of the examples that I tend to use a lot is really using our [inaudible] so not only before it's due, but just regular as a tool or you can just compare year to year, look at your setups, see if inventory is changing, really looking at using that as your map as to all right, these are the projects.

These are what I want to check and going into each one of them and we had almost like a sheet that we checked off, just said review the PDDEs, review the things that we wanted to check and comparing them to the grants that Meradith was talking about. Like if you have access to those grants, you can use that list, use the grants and compare is the information the same? Is it accurate.

So we see the chat going up. I'll read a few examples. So Lynn is saying that they monitor all agencies. Tracy is saying that the exit destinations are a big one. That is definitely a big one and you see that a lot in SPMs if you look at your returns to homelessness and things like that. If you have somebody that is just returning day two, returning day three, there's just something not going wrong with that exit destination.

One has some dashboards. Lynn also uses her [inaudible] submissions to update PDDEs. Another suggestion is while you guys keep on chatting. It's having somebody else review. Sometimes not only you as an HMIS admin, you might not necessarily know but having a committee or a place where people that know about the project, know about the changes that happen take a look at it as well.

I wish that you guys were off mute so you could talk about the really cool examples that I'm seeing in the chat, but we have somebody Gladys is talking about project utilization. Tyler looks at coordinating with both CoC and our coordinated entry team to make sure the right things are happening, i.e., is a program reported to as an ES asking for a PHS referral. That is smart, Tyler. That's a good example.

All right. So we have a few examples there. I'm going to move us forward because I know that there might be some unanswered questions. And so we're going to leave I think if you want to forward to the Q&A slide, I know we did not answer all of your questions. If we did not, submit an AQ, there is actually a lot of people looking at those and they're there to help you. So if you have one of these examples that's just really hard and gray and none of what we talked about today covered it or you just have additional questions, please go ahead and submit in AAQ.

All right. We do have four minutes left and we're going to use them. So if you have any questions, you want to type in the chat now, we can go ahead and spend the rest of the time answering those.

Meradith Alspaugh: And I saw the questions about ROH inventory maintenance and I wanted to -- I'm going to pull this document real fast and post a link to it. So give me one second. I'm going to turn my attention over here. Joan, if you want to take those because there was a resource that was developed for bed inventory that I think could be helpful.

So I just posted it in the chat, the link to the recording of the bed and unit inventory for rapid rehousing projects. This was released early this year, I believe, end of last year something like that, that provides some additional guidance. So maybe that and this was reviewed in coordination with the LSA team, with the [inaudible] team, so lots of different folks looked at this in an attempt because again we recognize that things don't always perfectly align, but to identify where these sort of hiccups might hit you.

Were there other questions? Sorry, it moved real fast there for a few minutes when you guys were all putting your awesome ideas in.

Joan Domenech: I am not seeing any other questions. It's a lot of good suggestions on the project setup review. Well, since we are not seeing any other questions, did you have anything else, Meradith? I was going to talk about the certification.

Meradith Alspaugh: No, go for it.

Joan Domenech: Can you move to that slide? All right, And so if you participated and you put your correct information at the beginning, you will get credit. So this is one of the sessions that -- one of the four that you have to complete. There's seven on the track of four to have your certificate. All you have to do if you signed in with your information, that will automatically give you credit.

So thank you everybody for being here. Thank you so much for participating and making it as much pure learning as we could in the chat, and we appreciate your time and hope you have a great day.

Meradith Alspaugh: Thanks, everyone. Bye.

(END)