



HMIS Project Setup 201

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And

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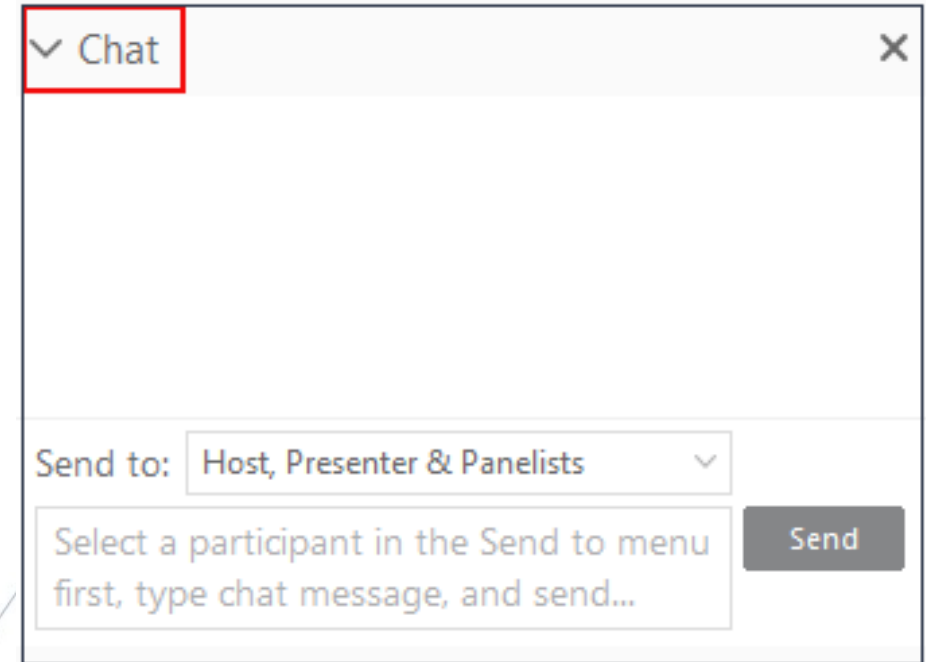


Webinar Instructions

- Webinar will last about 60 minutes
- Access to recorded version
- Participants in 'listen only' mode
- For technical issues, request assistance through the Chat box

Webinar Instructions

- Please submit your content related questions and comments via the chat box. **Send to everyone**
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- 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!

Learning Objectives

- Review identified common challenges for completing HMIS project set up.
- Provide attendees with key considerations for more advanced HMIS project set up and possible solutions for common challenges.
- Identify the proper set up structure and hierarchy for the HMIS Solution used in your local CoC.
- Learn about resources available for project setup (documentation and subject matter experts).

Meet the Presenters: Joan Domenech

- Program Manager, Corporation for Supportive Housing
- Current areas of work: Unsheltered Homelessness TA, COP Data Quality, HMIS NOFA TA, Performance Management.
- Previously: Corrections programs, Coordinated Entry program Manager, HMIS Program Manager.

Meet the Presenters: Meradith Alspaugh

- COO, The Partnership Center, Ltd.
- Current areas of work: HMIS Data Lab- focused on HMIS Software Providers, System Administration, HMIS Data Standards, work with federal partners, and Sage
- Previously: Case Management, Program Supervision, CoC

Leadership

Important Project Setup Reminders



- No single project in HMIS may have more than one project type
- Onboarding procedure can save you many headaches
- Communication between CoC, HMIS Lead and Agency being on boarded is key
- Know the reporting requirements
- Have a procedure for correcting data involve vendor when needed
- Use available project setup resources

Project Setup Resources -
<https://www.hudexchange.info/programs/hmis>

General Information	Manual
Continuum of Care (CoC) Program	CoC Program – HMIS Manual
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
FY2020 HMIS Data Standards	Interactive Data Standards Tool

PDDEs

1

Multiple Funding Sources

2

New/demo funding sources

3

Multiple Sub recipients

4

Common Project Set Up Challenges

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Project Type Changes

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Project Closures, Consolidations & transferring

7

Reporting

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Comparable Database

Project Set Up Challenges: PDDEs

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

Poll

If there are **different 'Bed and Unit Inventory' Bed Types** for a project i.e. one record has 'Bed Type = Facility Bed', and one record has 'Bed Type = Voucher Beds', should these be two separate projects set up in HMIS?

- Yes
- No

Poll

I have a tenant based rental assistance project that is funded to operate in CoC A but **sometimes** people are housed in CoC B because of unit availability. Do I need to enter more than one CoC Code in 2.03?

- Yes
- No

Poll

Do I need to update Bed and Unit Inventory Information each time there is a change in beds and/or units?

- Yes
- No

Type of “change”	Update needed in Bed and Unit Inventory?
<p>ES project originally had 10 units with 20 beds. A large family entered the project and now there are 25 beds in use.</p>	<p>No – this is a minor fluctuation in project operations.</p>
<p>A fire happened in the PSH apartment building and instead of 20 units, the building only has 15 habitable units. Due to severity of damage, the units won't be available for occupancy for several months.</p>	<p>Yes – create an “end date” for the 20 units of PSH as of the date the units went offline. Create a “start date” for the 15 units still online as of the same date. Once the units are repaired and available for occupancy, a new inventory record should be created.</p>
<p>A PSH project with 15 beds/units had a portion of its funding reallocated in the CoC process and now only has funding to operate 5 units of PSH.</p>	<p>Yes – this is a permanent funding change and the 15 beds/unit should have an inventory end date added. The 5 remaining units will have a new start date added.</p>

Project Setup Challenge: Multiple Funding Sources

- A single project *may* have more than one funder.
 - Verify that funding sources can be combined in a single project using the project set up tool.
- Examples of when you *cannot* combine multiple funding sources in one project:
 - Street Outreach, Prevention, & RRH funded by multiple ESG jurisdictions
 - **UNLESS**, your HMIS has the functionality to:
Separate the clients served in a combined project for each ESG jurisdiction; and
Produce a valid CAPER for each ESG jurisdiction.

How to set up a project: Explore project set up tool



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 – 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:

PH - Rapid Re-Housing

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:

HUD:ESG – Rapid Rehousing

Funding Program 2:

HUD:ESG – Rapid Rehousing

Funding Program 3:

Element	Required Element	Required Element	Required Element
4.02	Income and Sources	Income and Sources	
4.03	Non-Cash Benefits	Non-Cash Benefits	
4.04	Health Insurance	Health Insurance	
4.05	Physical Disability	Physical Disability	



Project Set Up Challenge: Multiple Funding Sources

Some projects may receive funds from multiple funding sources for different eligible activities. For example, a project may receive a grant for residential operations/leasing costs and another grant for services. HMIS Lead has two options here:

Option 1: Create one project in the HMIS that both the housing provider and the service provider **jointly share and record data**, or

Option 2: Create two separate projects, one for the housing provider and another for the service provider

Setting up a project with multiple funding sources

If Option 1 is chosen:

The *Project Type* (data element 2.02) will be the appropriate residential project type (e.g., TH, PSH, etc.), and the *Federal Partner Funding Sources* (data element 2.6) will identify both funding sources / component types for the project

If Option 2 is chosen:

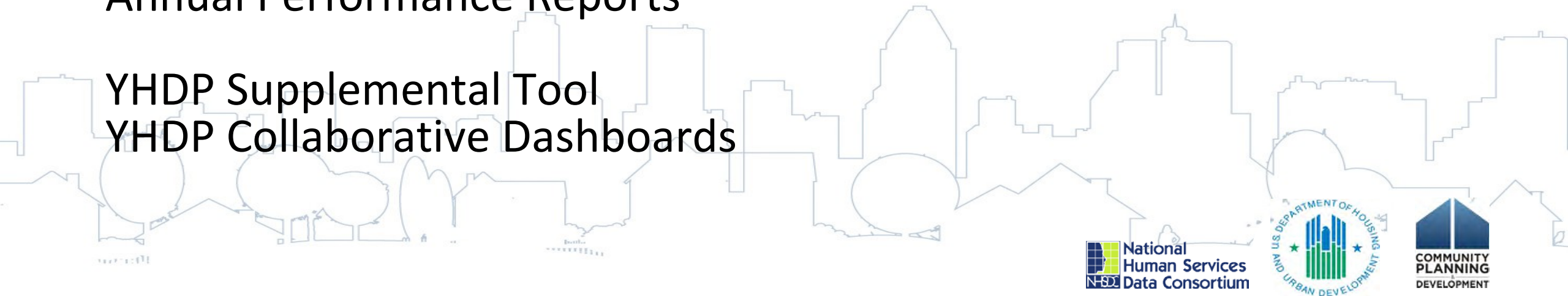
The housing project will have an appropriate residential *Project Type*
The services project will have a *Project Type* of 'Services Only.' Service Only projects can then be affiliated with the residential project and data can be linked.



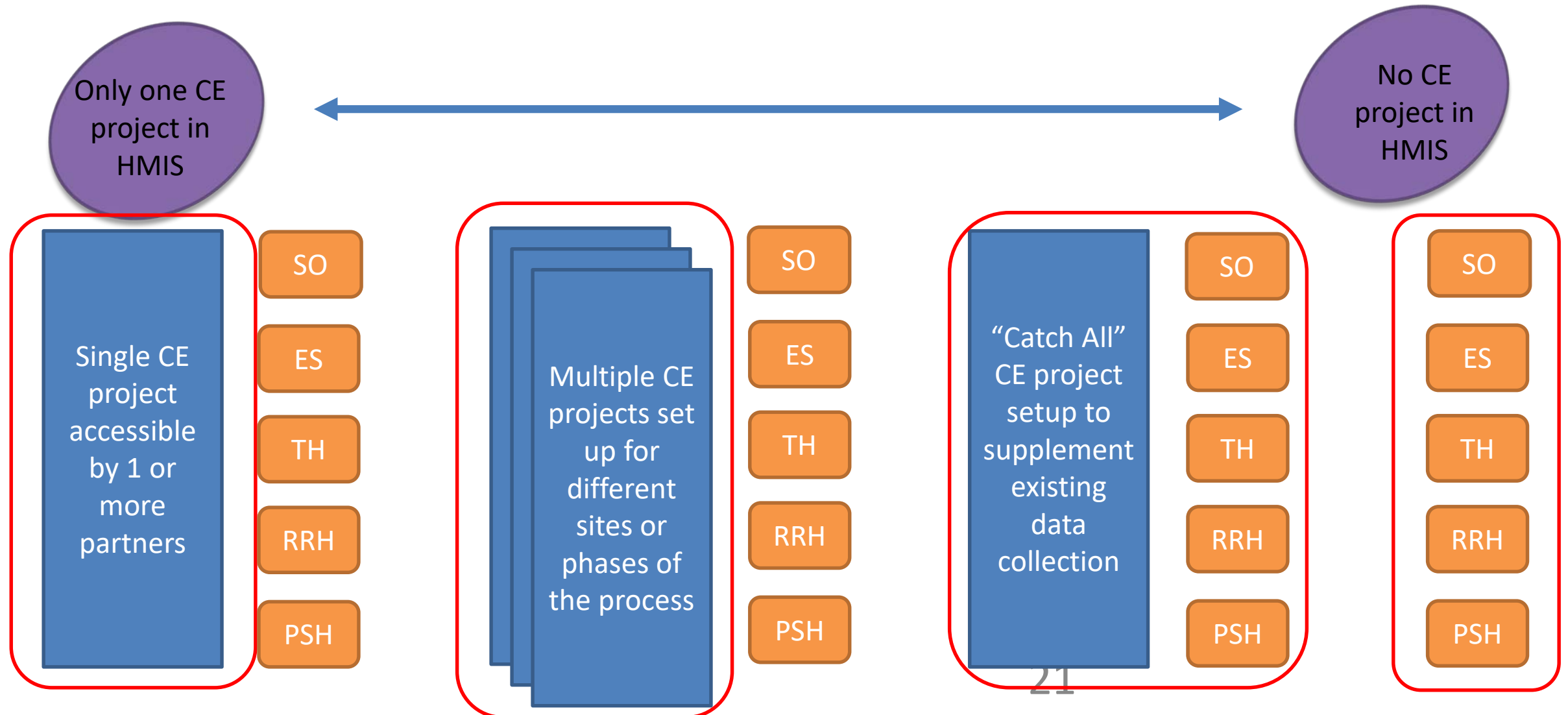
Project Setup Challenges: New/demo funding sources YHDP

Youth Homelessness Demonstration Program
YHDP funding can be used in innovative ways; take care to ensure accurate project setup by project type
YHDP Communities are encouraged to collect Runaway Homeless Youth Program (RHY) data elements in addition to CoC Program data elements.
YHDP Communities are required to submit additional data in their Annual Performance Reports

YHDP Supplemental Tool
YHDP Collaborative Dashboards



Project Setup Challenge: Coordinated Entry



Project Setup Challenge: Multiple Subrecipients

If setting up multiple subrecipients ensure:

- HMIS Privacy settings allow recipient (or sys admin) to generate reports across all projects.

Project Setup Challenge: Project Type Changes

- Sometimes Field Offices permit project type changes to occur through grant amendments.
- Points to consider before changing a project type:
 - Do you (or recipient) have appropriate documentation from the HUD Field Office permitting this change? It is important to maintain documentation of any project type changes.
 - Determine the most appropriate time to change the project type. Ideally, if a project type change occurs, it happens at the end of an operating year so as to not have two different project types operating during the same reporting year.
 - Changing a project type mid-year may result in some data not being collected (i.e. a TH project changing to RRH will not have housing move-in date)

Project Setup Challenge: Consolidation

- Consolidating projects in HMIS
 - Beginning in the 2018 CoC Program Competition, grant recipients had the option to consolidate up to 4 eligible renewal projects into one grant.

HUD released [A Blueprint for Understanding How They Work](#) in early 2019.

HUD will soon release additional guidance for project consolidations, closures, and transfers.

Project Setup Challenge: Consolidation

- There are several options for handling grants that are consolidated or eliminated but the preferred method to use in the HMIS is to *administratively move the entire client record from the old project to the new project.*
- Exiting and then re-entering a client should only occur in very limited situations.
- The method used must be determined by the HMIS System Administrator and the recipient entities involved and must be decided prior to the end of an operating year.

Project Setup Challenge: Consolidation Option 1

Option 1: Administratively move complete records from one project to another in HMIS

Using this method, a client record is “selected” by the system administrator and “moved” to a different project. By doing this all of the history of the client in a project and the integrity of the record remain in-tact.

Identify the project in HMIS that is to be used for the surviving grant or where recipients of a grant that has terminated will now be participating in. This project may be an existing project in the HMIS or a totally new project that multiple providers will access for some consolidations.

Project Setup Challenge: Consolidation Option 2

Option 2: Reassign the project to the new recipient in HMIS

Using this method, all client records of the project are given to the surviving project simply by reassigning the project to another organization in the HMIS.

Project Setup Challenge: Consolidation Option 2

The System Administrator, on the day after the end of the operating year, will change the following information in the HMIS:

- **PDDE 2.01 *Organization Information*** – Reassign the project to the organization operating the target project by changing the Organization ID and Name in the existing project.
- **PDDE 2.02 *Project Information*** – Do not change the Project ID or the project type. Edit the project name, housing type, and target population as needed.
- **PDDE 2.03 *Continuum of Care Information*** – Update the CoC information, adding geocode and address information as needed.
- **PDDE 2.06 *Funding Sources*** – Add or edit new grant identifiers and start/end dates. Incorporate the funders associated with the closing project into the new target project.
- **PDDE 2.07 *Bed and Unit Inventory Information*** – Update bed and unit inventory as of the date the consolidation or transfer occurs. Remember to update this in both the terminated project(s) and new project.

Project Setup Challenge: Consolidation Option 3

Option 3: Exit client from one PH project and start in another PH project

Using this method, all historic information about the client remains in the original project and the surviving project will document the information on the client as of the date of project start. This option will result in clients appearing in reporting as not literally homeless at project start, not chronically homeless, and loss of any positive income outcomes obtained in the first project.

Record a client exit in the original project as the date of move out. Select “Permanent housing (other than RRH) for formerly homeless persons” as the destination.

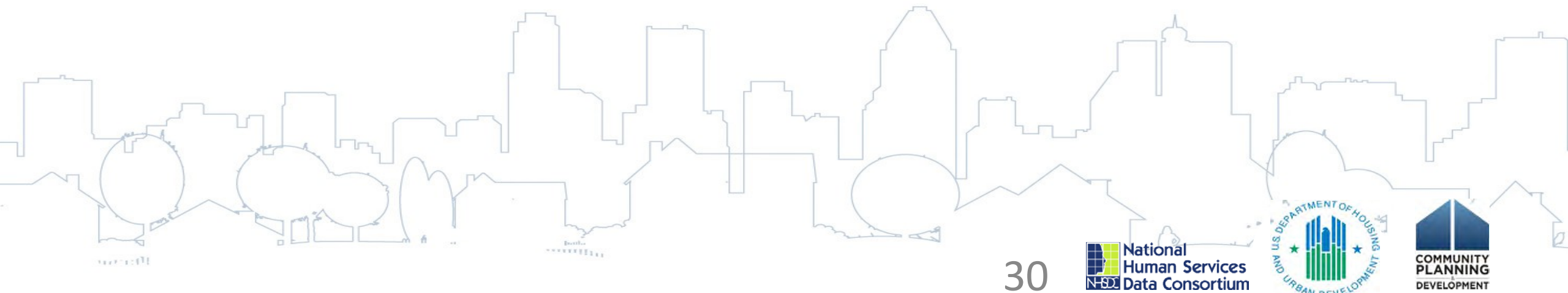
Record a project start date in the new project the day after the exit from the old project. Remember to enter the housing move-in date.

Record all data elements as they are on the date of project start in the targeted project.

Project Setup Challenge: Consolidation Option 4

Option 4: Leave existing project in HMIS

There is no requirement that the projects in HMIS change.



Project Setup Challenge: HMIS Reporting

- It's best to identify problems or issues *before* the project begins operating and reports are due.
- Project type in HMIS must align with reporting requirements.
 - Sage will not accept a CSV APR/CAPER upload for a project different than the project type funded.
 - RHY and SSVF Reporting Repositories rely on project type for upload.
 - System Performance Measures and LSA rely on accurate project types.
 - LSA in particular relies heavily on PDDEs
- Incorrect project typing may result in missed data collection requirements.

Project Setup Challenge: Comparable Databases

A comparable database is a relational database that meets

- all HMIS Data Standards; and
- the minimum standards of HMIS privacy and security requirements, including HUD's most recent reporting standards and comma separated value (CSV) format specifications.

Discussion: Identifying and correcting project set up issues

- **What are some project set up checks you can do proactively so you are not waiting for errors in one of the required reports to know you have set up issues?**

Resources



Don't be afraid to 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.