



HMIS Project Setup 201

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Becca Elliott (she/her/hers), PCL

Jesse Jorstad (he/him/his), Abt Associates

Alissa Parrish (she/her/hers), ICF



Becca Elliott, PCL

she/her

Prior to TA, I worked in Higher Education for 10 years, I am currently pursuing a PhD in Educational Policy and have certificates in Non-Profit Economics and Data Analytics.

I have been with PCL since July 2021. I provide technical assistance for Sage and YHDP Data Collection and Reporting.

I live in Cincinnati, OH with my partner and minpin.

I enjoy traveling, reading, and trying not to kill my houseplants



Jesse Jorstad, Abt Associates

he/him

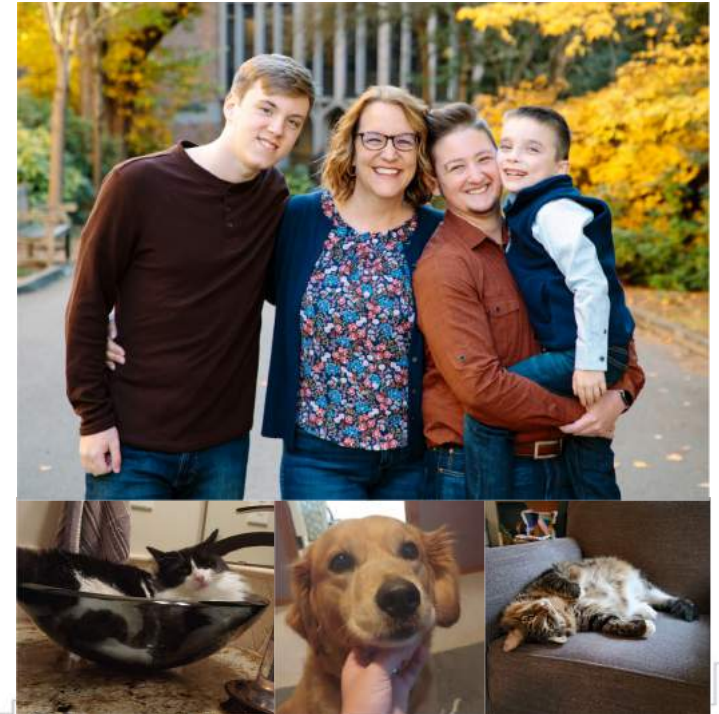
Prior to TA, I worked in homeless housing administration for 12 years:

- *5 in PSH rental admin in non-profit*
- *7 total with the County*
 - *2 in CoC Contract/Planning*
 - *5 in HMIS/Data analytics*

I have been with Abt Associates for 1.5 years.

I live in Lake Stevens, WA with my spouse, two kids, two cats and a dog.

I enjoy painting and volunteering to support LGBTQIA+ youth and young adults in my community.



Alissa Parrish, ICF

she/her

Prior to TA, I worked in direct services and HMIS for several years:

- *5 as the shelter manager for an emergency shelter*
- *5 as the HMIS Director for several implementations*
 - *Alaska statewide*
 - *Boise, Idaho*
 - *North Dakota statewide*

I have been with ICF in some way, shape, or form since 2018 but full-time since 2020.

I live in Des Moines, IA with my 3 children and no non-humans live with us but I do love dogs.

I enjoy running. A lot. And staying fully caffeinated to keep up with my energetic children.



Learning Objectives

- Determine the proper set-up and hierarchy for HMIS implementation used in your local CoC.
- Understand and identify common challenges and solutions for completing HMIS project set-up.
- Identify key considerations for advanced HMIS project set-up and possible solutions.
- Learn about resources available for project setup.

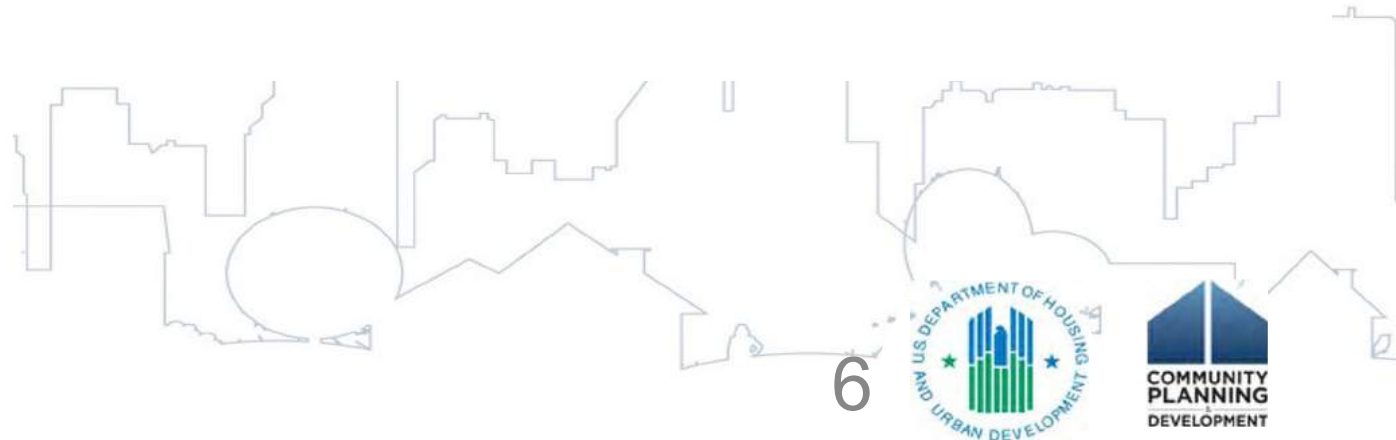


Review and Overview



REVIEW

OVERVIEW



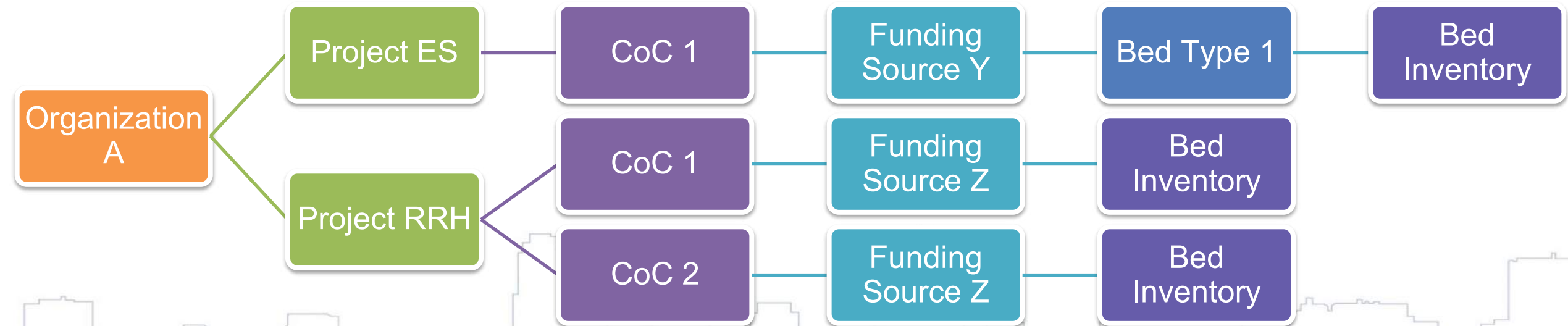
Important Project Setup Reminders

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

IMPORTANT



Hierarchy of Relationships



Difference between In-Real-Life and In-HMIS-Life

HMIS is a tool that helps us understand **who we're serving** and **how our system is functioning.**

Examples: PATH, Coordinated Entry, Project Type in HMIS and scope of services provided by the project

It **won't meet every need** and it **won't replicate real life perfectly**

Balance between HMIS being reflective of real life and becoming overly complicated/customized

How Does it Impact Reporting

- Always, always consider reporting implications
 - System-level reports like LSA and SPMs
 - Project-level reports like CAPER and APR
 - Locally-determined reports like Prioritization List
- More on this later!



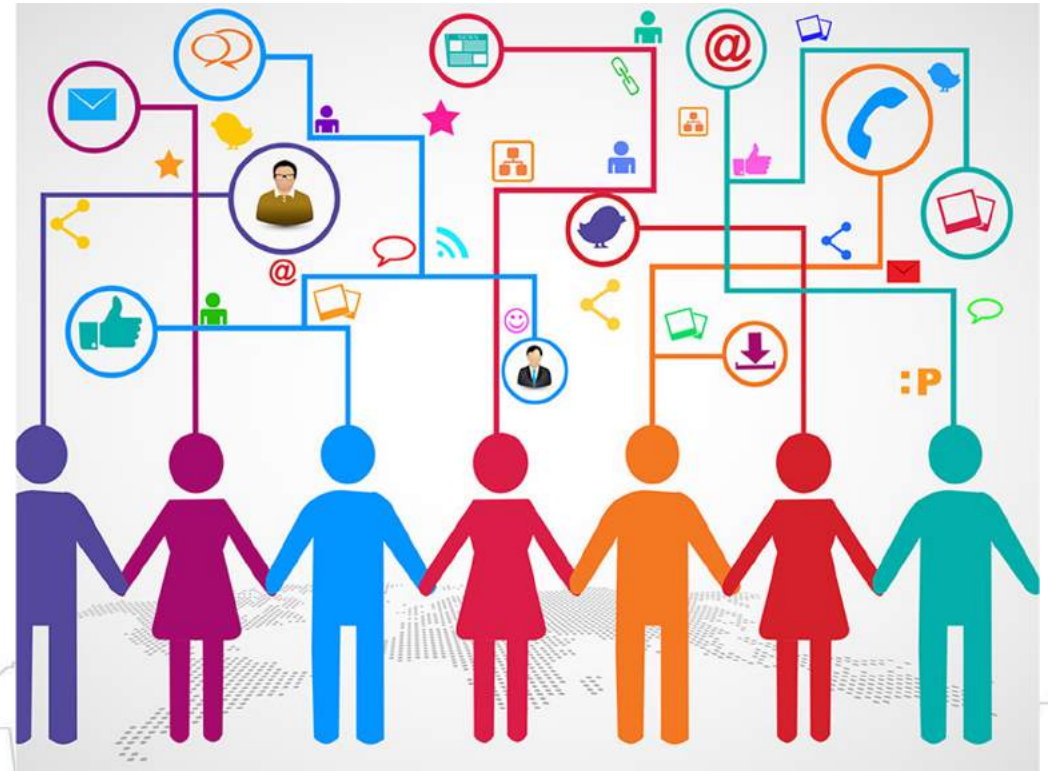
Communication

...is VITAL!

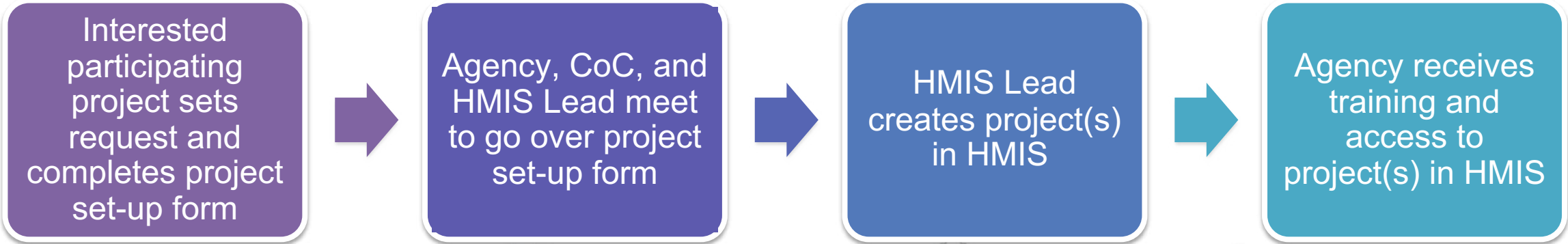
Between and among:

- the HMIS Lead,
- CoC,
- participating organizations,
- funders,
- HMIS vendor,
- other stakeholders.

What's your communication plan?




Potential Process/Communication Flow



Project Set-Up Tool Can Help

<https://www.hudexchange.info/resource/4898/hmis-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.

Reset choices

Federal Program 1:	N/A
Federal Program 2:	N/A
Federal Program 3:	N/A

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

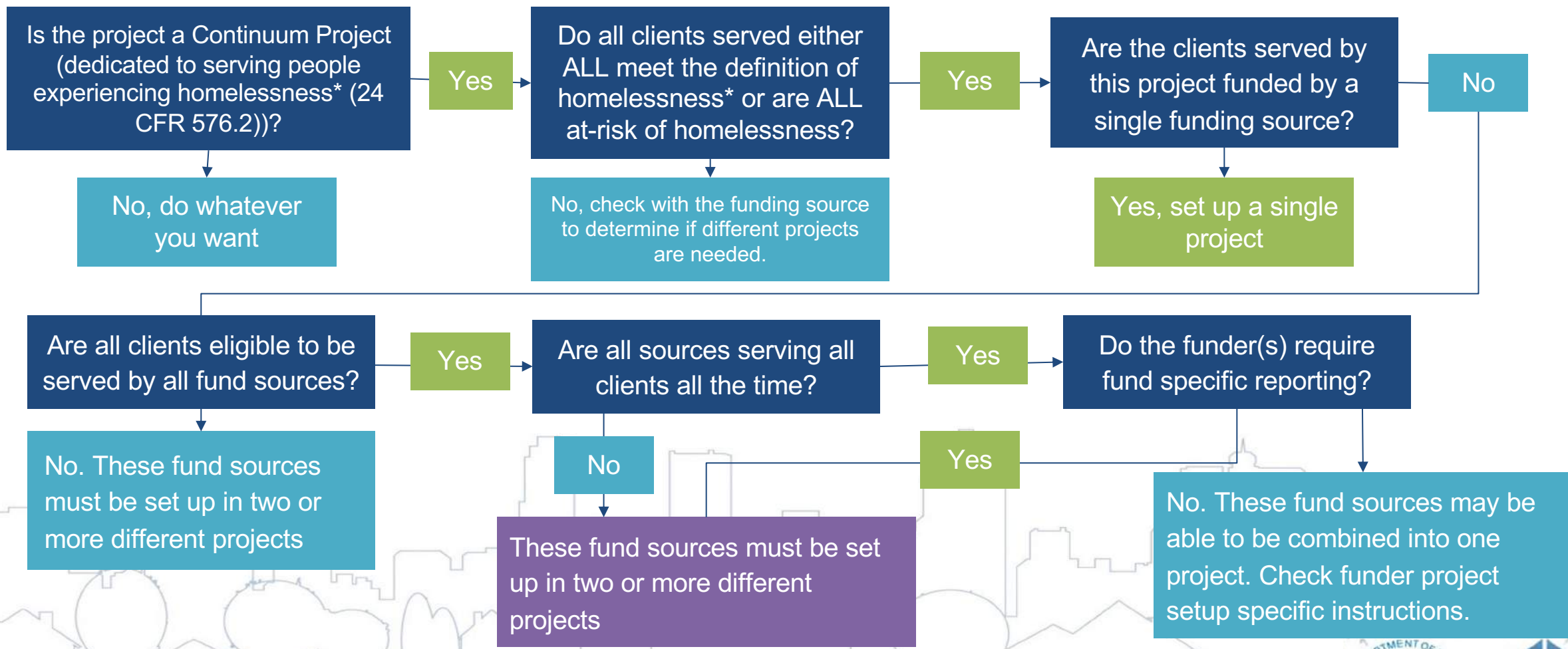
	N/A
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1st Component's Project Type: N/A
2nd Component's Project Type: N/A
3rd Component's Project Type: N/A

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:
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Project Set Up Decision Tree

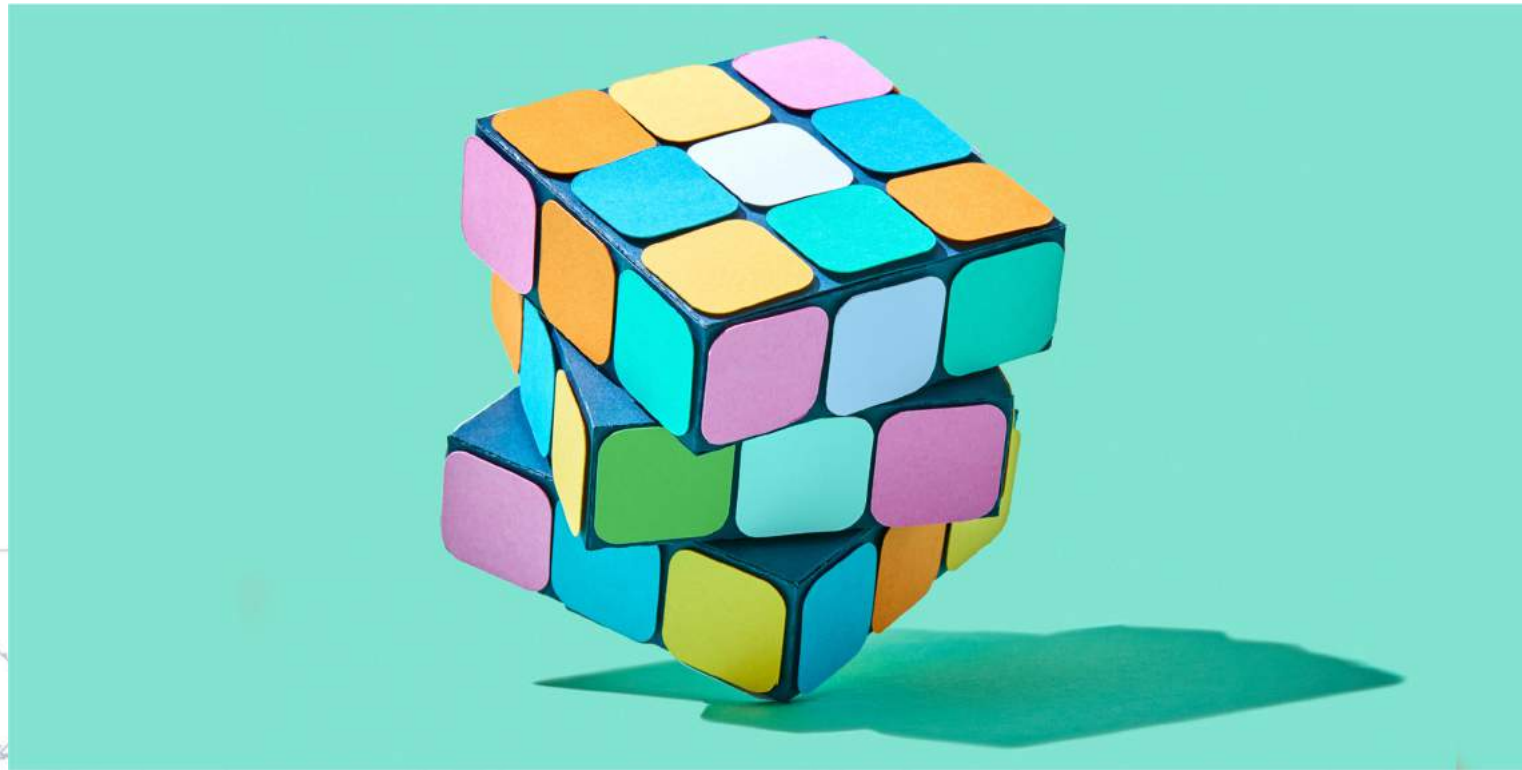


*Includes category 2:

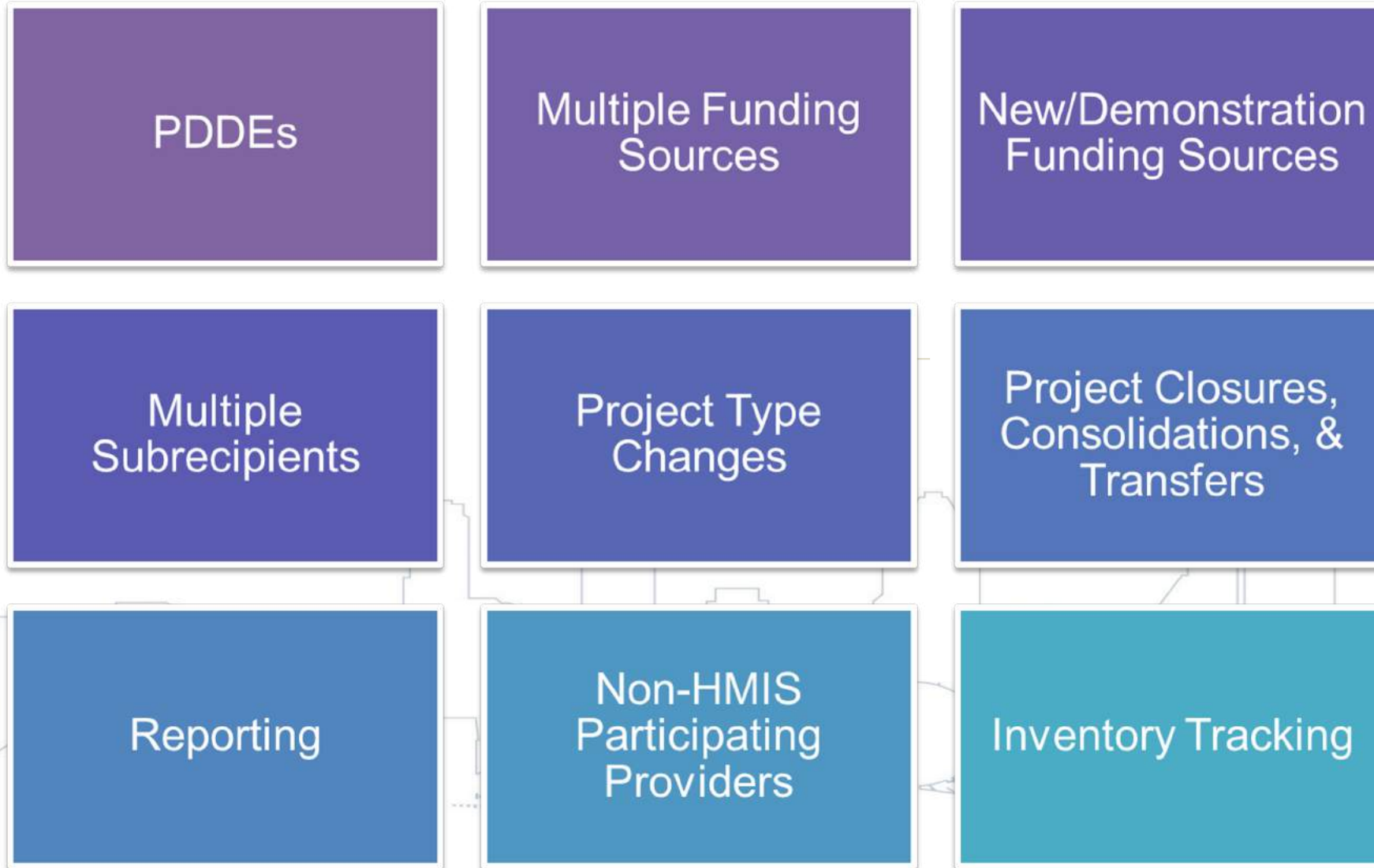
https://files.hudexchange.info/resources/documents/HomelessDefinition_RecordkeepingRequirementsandCriteria.pdf



Project Setup Challenges



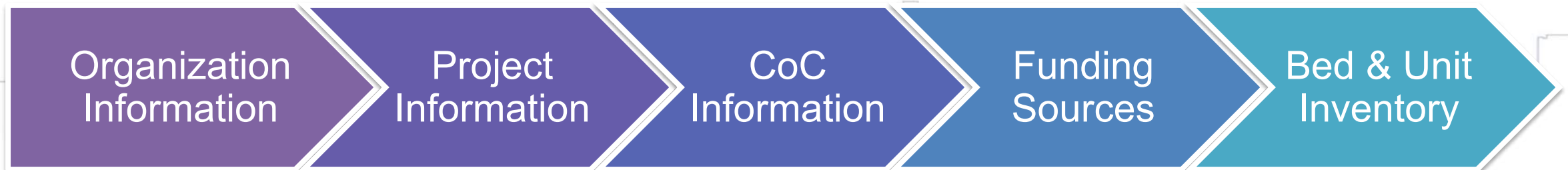
Common Project Setup Challenges



What are PDDEs

Project Descriptor Data Elements (PDDEs) are used to identify organizations, specific projects, and corresponding project details to which an individual client is associated in HMIS

Accuracy is vital to the health of the HMIS



Project Type Changes

- How you address depends on the situation – let's talk through a couple!

Emergency Shelter shifts from Entry/Exit to Night-by-Night

A project that has always been typed as Transitional Housing in HMIS recently stopped requiring people to sign a lease, sublease, or occupancy agreement but that they simply require a bed night charge

It is discovered that a PATH-funded organization is transferring the funding to another organization and they are switching from Street Outreach only to both Street Outreach and Supportive Services

Multiple Funding Sources

Whether you need one or more projects depends – let's walk through some common scenarios!

ESG & RHY

- Funds ES/BCP
- Youth 18 and over served with ESG; youth under 18 served with RHY

CoC & ESG

- Funds RRH
- All households are provided supportive services with CoC funds and rental assistance with ESG funds

ESG & ESG-CV

- ESG-CV funding added to an ESG-funded HP
- ESG-CV funding began 10.1.2021 and will end 6.30.2022 and ESG will continue

Bed/Unit Inventory

What is inventory?

The total number of beds and units available for occupancy.

CoCs must include all of the dedicated homeless beds and units available for homeless persons regardless of whether:

- the project participates in HMIS or not
- the project receives HUD funding
- the bed was occupied.

Inventory is asking:

Including the people you are sheltering/housing tonight, how many beds/units do you have available (by household type) each night?

Why Should I Care About Inventory?

Inventory records in HMIS are important because they enable communities to:

- understand the current **capacity** of their system (by project type, household type, geography, etc.);
- identify whether resources are being fully **utilized** (and which project types/provider resources are under/over utilized on a daily/monthly/grant basis);
- report on **resource availability** (and if both inventory and HMIS enrollment information is actively updated, to identify vacancies in real-time – even without employing a full bed management system), and more!

Because inventory informs utilization it is central to the annual estimate of homelessness for the AHAR. Which matters because the AHAR is the congress's primary source of information about our work.

When Separate Inventory Records Are Needed

Projects must have separate inventories for each household type [Adult Only (AO), Adult/Child (AC), and Child Only (CO)].

- For example, if a project started on 1/1/2019 and expected to serve with **20 units and 20 beds for AO households** and **20 units and 40 beds for AC households**, then two inventory records, one for each household type, would be created with an inventory start date of 1/1/2019.
- Projects must have separate inventories for each bed availability (year-round, seasonal, overflow).
- Projects that operate in more than one CoC must have separate Bed and Unit Inventory Information records for each Continuum of Care Information record.

When Inventory Changes Are Needed

When inventories significantly change for any reason (household type, availability, bed type), new inventory records should be started.

- If the change is a reduction in availability, the relevant inventory should be ended.

Example: In reviewing your inventory to ensure reconciliation for the final week of July you find these beds are actually occupied by **25 AO households with 25 people, and 15 AC households with 35 people.** You determine this occurred near the beginning of July. The change could be handled in the following way (not all relevant data fields are shown, for illustrative purposes only):

Record #	Household Type	Inventory Start Date	Inventory End Date	Units	Beds
1	AO	1/1/2019		20	20
2	AC	1/1/2019	6/30/2019	20	40
3	AO	7/1/2019		5	5
4	AC	7/1/2019		15	35

Note: It is acceptable to use estimated dates to reflect changes in inventory

Other Considerations About Inventory Changes

Significant changes in inventory are defined by the community, but the inventory should reflect the clients being served.

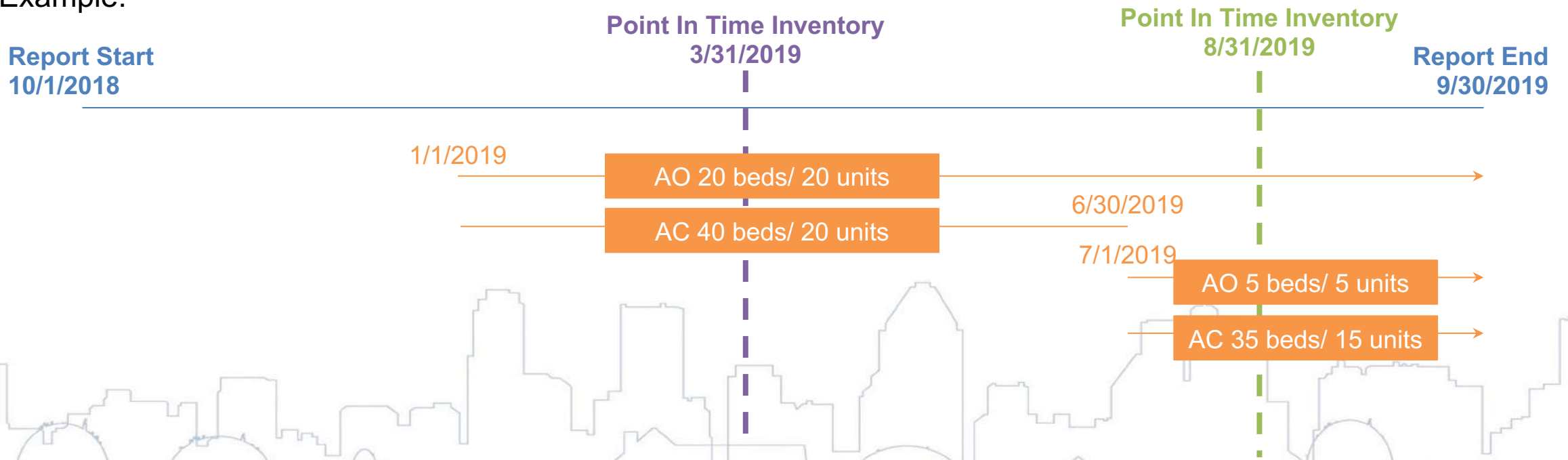
Small day-to-day fluctuations do not need to be changed in HMIS, but if there are relatively large and sustained differences between the inventory and the clients served, a change in inventory should be considered.

Inventory should be accurately recorded within the last week of each of the months of January, April, July and October. Changes should be backdated to the exact or approximate date of the significant change in inventory, not the date the change was made in HMIS.

Example...

HMIS data must comply with the FY2022 HMIS Data Standards Manual which requires the maintenance of historical records for project and people data in HMIS. This allows for a “snapshot” of what was happening in the project on any given date.

Example:



PIT for Inventory: AO 20 beds/ 20 units, AC 40 beds/ 20 units

PIT for 8/31/2019: 25 beds/ 25 units, AC 35 beds/ 15 units

Do I Need to Update Bed Inventory in HMIS

Type of Change	Update Needed?
ES project has 10 units with 20 beds. A large family entered the shelter and there are currently 25 beds in use.	No – this is a minor and temporary fluctuation in project operations.
A fire happened in a 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.	Yes – create an "end date" for the 20 units of PSH as of the date the 5 units were damaged. Create a "start date" for the 15 units still available as of the same date. Once the units are repaired and available for occupancy, a new inventory record should be created.
A PSH project with 15 beds/units had a portion of its funding reallocated in the CoC competition process and now only has funding to operate 5 beds/units of PSH.	Yes – this is a permanent funding change and the 15 beds/units should have an inventory "end date" added. The 5 remaining units will have a new "start date" added as of the same date.

Project Closures, Consolidations, & Transfers

<https://files.hudexchange.info/resources/documents/Grant-Consolidation-and-Closing-Projects-How-to-handle-client-data-in-HMIS.pdf>



Grant Consolidation and Closing Projects:
How to handle client data in HMIS

Scenarios

Maybe we build interactivity in here – go through scenarios of improper project setup, leveraging the LSA DQ guide, and how it directly impacts reporting

Project Type

Bed Inventory

Operating End Date

HMIS Participating Project

AAQ

- Don't be afraid to STOP and ask questions
- 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 of Step 2 of the question submission process.



Project Setup Resources

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

General Information	Manual
Continuum of Care Program (CoC)	CoC Program – HMIS Manual
Emergency Solutions Grants Program (ESG)	ESG Program – HMIS Manual
Housing Opportunities for Persons With AIDS (HOPWA)	HOPWA Program – HMIS Manual
Projects for Assistance in Transition from Homelessness (PATH)	PATH Program - HMIS Manual
Runaway & Homeless Youth (RHY)	RHY Program – HMIS Manual
Supportive Services for Veteran Families (SSVF)	VA Program – HMIS Manual
FY2022 Data Standards	Interactive Data Standards Tool
Youth Homelessness Demonstration Program (YHDP)	YHDP – HMIS Manual
Longitudinal Systems Analysis (LSA)	Preparing for the LSA – Common Data Quality Issues

Questions?



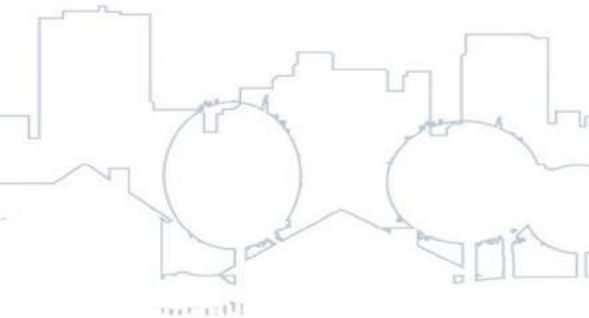
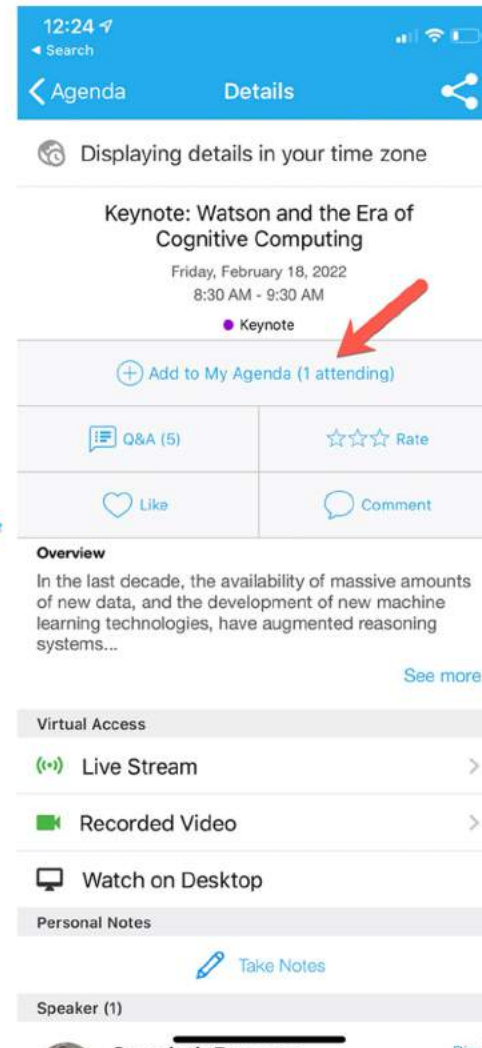
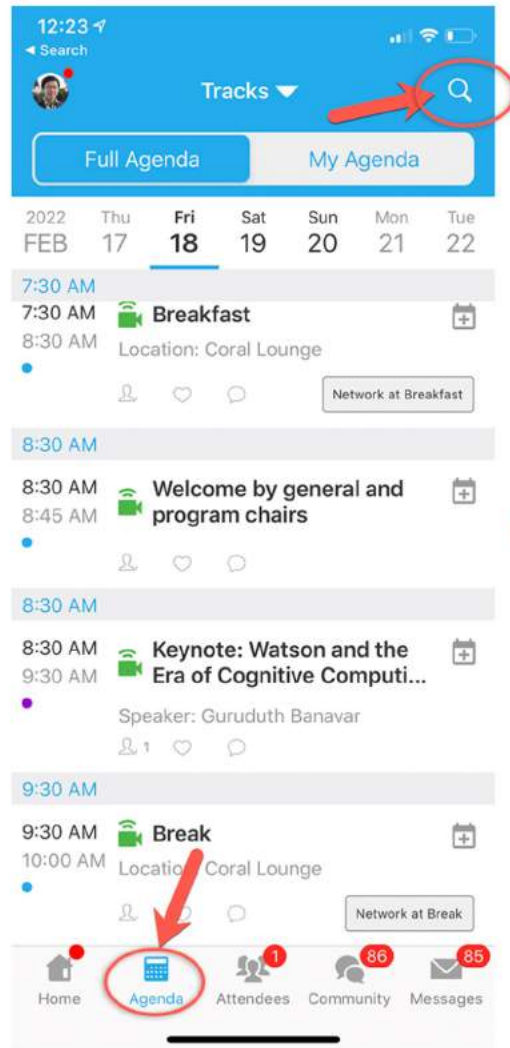
HUD Certificate of Completion

HUD is offering a certificate of completion for anyone who completes any four of the following six sessions at this NHSDC conference.

- HMIS Project Set-up 201
- HMIS Project Management and Annual Calendar of Expectations
- HMIS Governance 101
- Protecting Data in an HMIS Environment: Privacy, Security, and Confidentiality
- Implementing Effective Contract Negotiation and Relationship Management Strategies 201
- Data Quality 101: What is DQ?

Participants **must** complete the session evaluations for at least four sessions to receive their certificate.

Rate This Session!



Thank You!

Alissa Parrish
ICF
alissa.parrish@icf.com

Becca Elliott
The Partnership Center
bellott@partnershipcenter.net

Jesse Jorstad
Abt Associates
jesse_jorstad@abtassoc.com