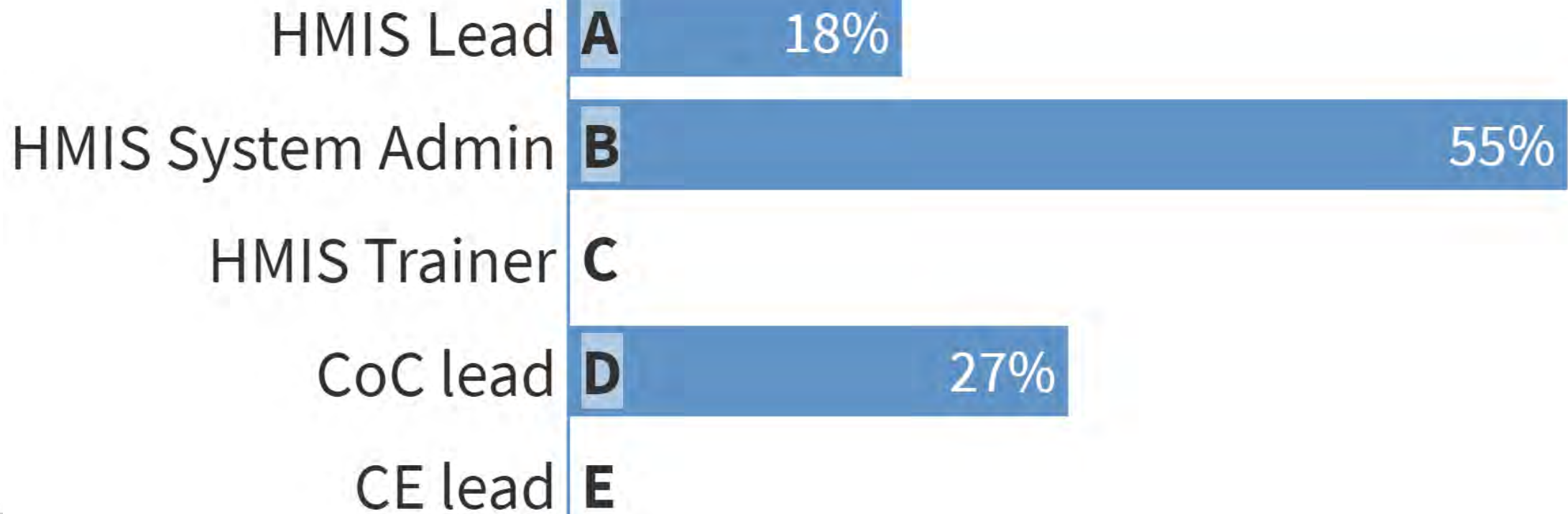# HMIS Project Set-Up 101

**Presenters**
**Joan Domenech, Corporation for Supportive Housing (CSH)**
**Brian Roccapriore, The Cloudburst Group**
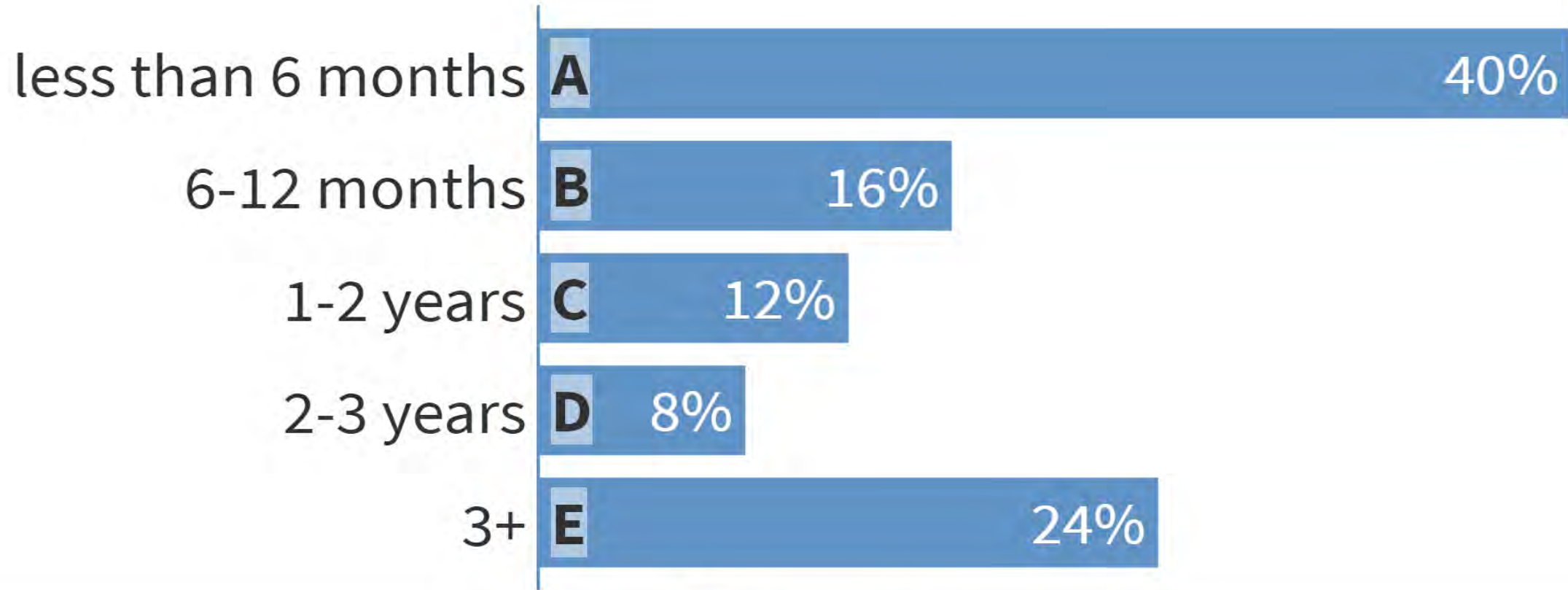
# Which of the following roles represent you ?

| Role | | Percentage |
|------|------|------|
| HMIS Lead | A | 18% |
| HMIS System Admin | B | 55% |
| HMIS Trainer | C | |
| CoC lead | D | 27% |
| CE lead | E | |

Poll Everywhere

# How long have you been in that role?

| Option | | Percentage |
|--------|---|-----------|
| less than 6 months | A | 40% |
| 6-12 months | B | 16% |
| 1-2 years | C | 12% |
| 2-3 years | D | 8% |
| 3+ | E | 24% |

Poll Everywhere

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

COMMUNITY PLANNING DEVELOPMENT

# 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 Analyst, The Cloudburst Group

- Oversees homeless programs and data analytics work

- Previously: 5+ years as HMIS Lead in the State of Connecticut

  - Provided leadership in the design of HMIS, coordinated entry, and cross system data sharing.

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# 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**

# 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

| PROGRAMS | PROGRAM COMPONENTS | HMIS Project Type |
|---|---|---|
| **CoC** | Safe Haven | **Safe Haven** |
| | Street Outreach | **Street Outreach** |
| | Supportive Services | **PH – PSH** |
| *ESG* | Short Term Housing (STH) | |
| | Permanent Housing (PH) | **PH – RRH** |
| *HOPWA* | Hotel/Motel (H/M | |
| | Transitional Housing (TH) | **Transitional Housing** |
| | Joint TH and PH-RRH | |
| *PATH* | Housing Information (HI) | |
| | Homelessness Prevention | **Homelessness Prevention** |
| **VA** | Permanent Housing TBRA | |
| | Emergency Shelter - Renovations | **Emergency Shelter** |
| | Permanent Housing Facility-Based | |
| **RHY** | Permanent Housing Placement (PHP) | |
| | Emergency Shelter – Shelter Operations | **Services Only** |
| | Emergency Shelter – Essential Services | |
| | Short Term Rent, Mortgage, Utility Assistance (STRMU) | |

# Programs

# Project Types

# 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

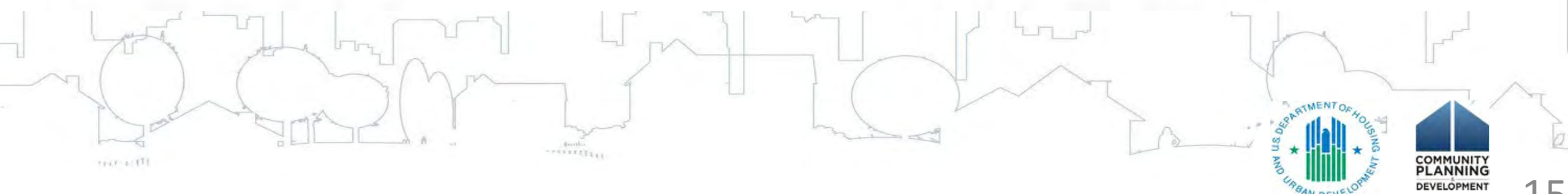| CoC Program Component | HMIS Project Type |
|---|---|
| **Permanent Housing (PH)** | PH: Permanent Supportive Housing |
| **Permanent Housing (PH)** | PH: Rapid Re-Housing |
| **Supportive Services Only (SSO)** | See SSO Chart Below |
| **Transitional Housing (TH)** | Transitional Housing |
| **Homelessness Prevention (HP)** | Homelessness Prevention |
| **Safe Haven (SH)** | Safe Haven |
| **Joint TH and PH-RRH** | Set up as two separate projects in HMIS:<br>• PH: Rapid Re-Housing<br>• Transitional Housing |

# HOPWA Program Components

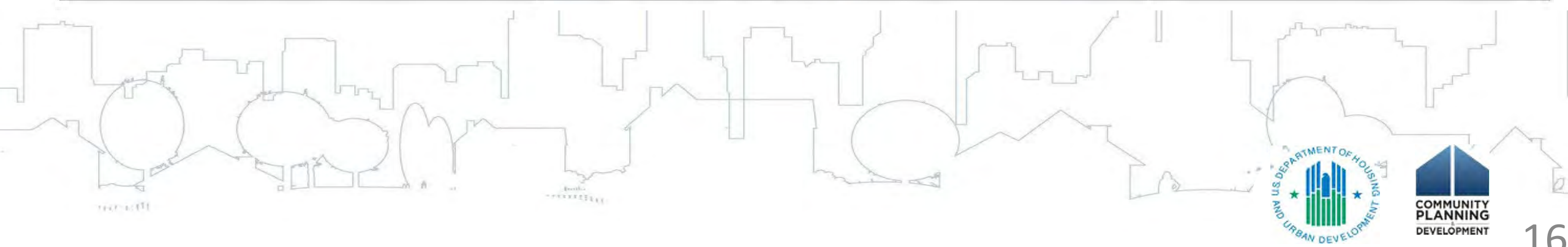| HOPWA Program Component | HMIS Project Type |
|---|---|
| Permanent Housing TBRA | PH – Permanent Supportive Housing |
| Permanent Housing Facility-Based | PH – Permanent Supportive Housing |
| Transitional Housing (TH) | Transitional Housing |
| Short Term Housing (STH) | Emergency Shelter |
| Hotel/Motel (H/M) | Emergency Shelter |
| Supportive Services Only not *in conjunction with housing (SSO)* | 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 **not meant** for human habitation (e.g. streets, abandoned buildings, etc.) | Street Outreach |
| Supportive Services | Persons who reside in a place **meant** 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<br>Day Shelter*<br>Transitional Housing** |
| Emergency Shelter – Essential Services | Emergency Shelter<br>Day Shelter*<br>Transitional Housing** |
| Emergency Shelter - Renovations | Emergency Shelter<br>Day Shelter*<br>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

# Data Collection: Required PDDEs

The following Project Descriptor Data Elements are required for project setup in HMIS:

2.01 Organization Information

2.02 Project Information

2.03 Continuum of Care Information

2.06 Funding Sources

2.07 Bed and Unit Inventory Information

# PDDEs and HMIS Project Set Up

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

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

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

# 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

# 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.

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# 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.

- **Project set up video with a focus on Bed and Unit Inventory Information**

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:

**PH - Rapid Re-Housing**

| | |
|---|---|
| 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

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# 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:

PH - Rapid Re-Housing

| | |
|---|---|
| 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.
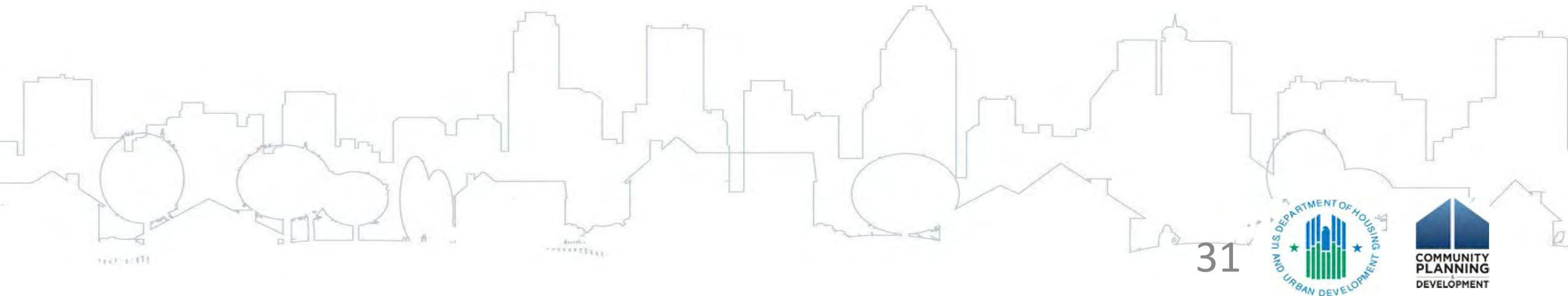
HUD recommends that recipients and subrecipients work together to design projects that use funds from one ESG recipient to support 100% of the ESG costs for each household. Furthermore, HUD recommends against providing ESG assistance to the same household with two sequential funding sources, if it can 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 set up tool

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# Project Set Up Relationship to Reporting Group Discussion

What is your experience with project set up and reporting? Any lessons learned you can share with the group?

# 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

Are they any other resources that you have found helpful that you can share with the group ?

# 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.
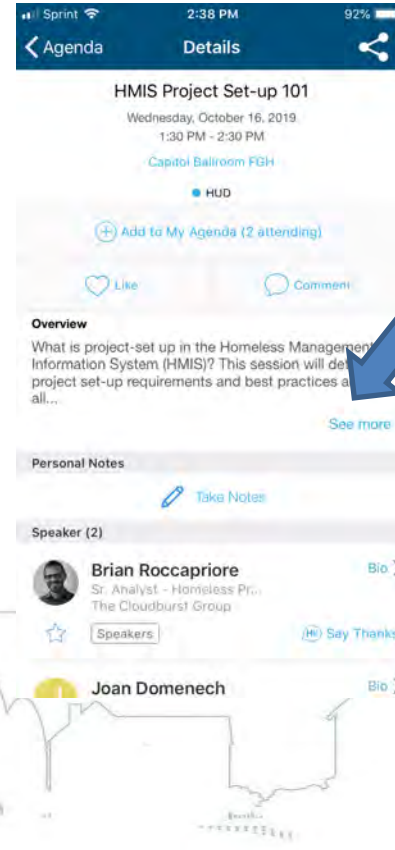
# Questions?

# Evaluate This Session on Your Conference App!
## (It takes 5 minutes to complete)
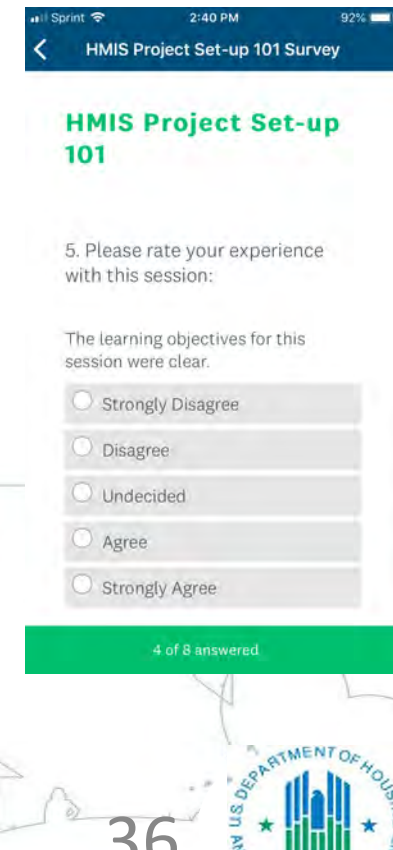
**1) Select the name of the session from the agenda tab.**
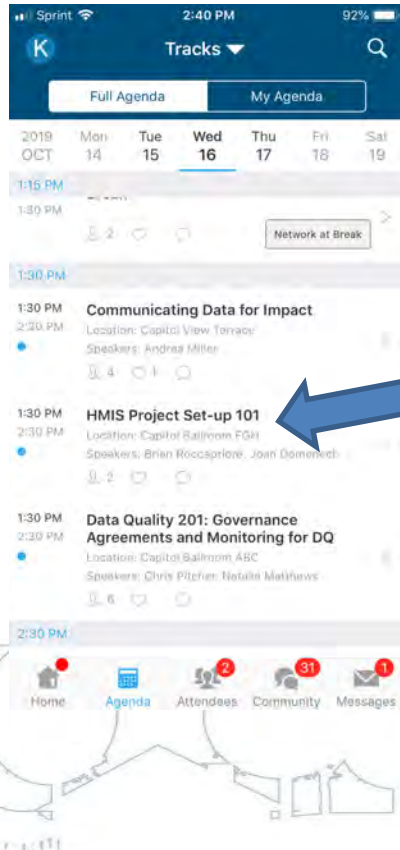
**2) Select "See More" under the Overview.**

**3) Select "SESSION SURVEY" under Details.**

**4) Complete the Evaluation and Select "Done".**

Rate Me!

# HUD Certificate-of-Completion

**Reminder**: HUD is offering a Certificate-of-Completion for completing all 4 sessions within the HMIS Foundations track.

**To earn credit for completion of this session**, please complete the evaluation on the conference app and include contact details when prompted.

# Thank You!

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