



HMIS Project Setup 201

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Participants must complete 4 sessions to receive certification.

HMIS Fundamentals

- HMIS Governance 101
- Implementing Effective Contract Negotiation and Relationship Management Strategies 101
- HMIS Project Set Up 201
- Achieving a Quality and Stable HMIS Staffing Pattern
- HMIS Project Management and Annual Calendar of Expectations
- Improving your Training Curriculum and Delivery

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Learning Objectives

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

Meet the Presenters: Greg Barchuk

- Lead Homeless Services Specialist, ICF International
- Current areas of work: HMIS capacity building, vendor transitions, racial equity, analysis and visualization
- Previously: 13 years in Montgomery County PA local government, including 3 years as HMIS Lead / system administrator / data analyst for Your Way Home



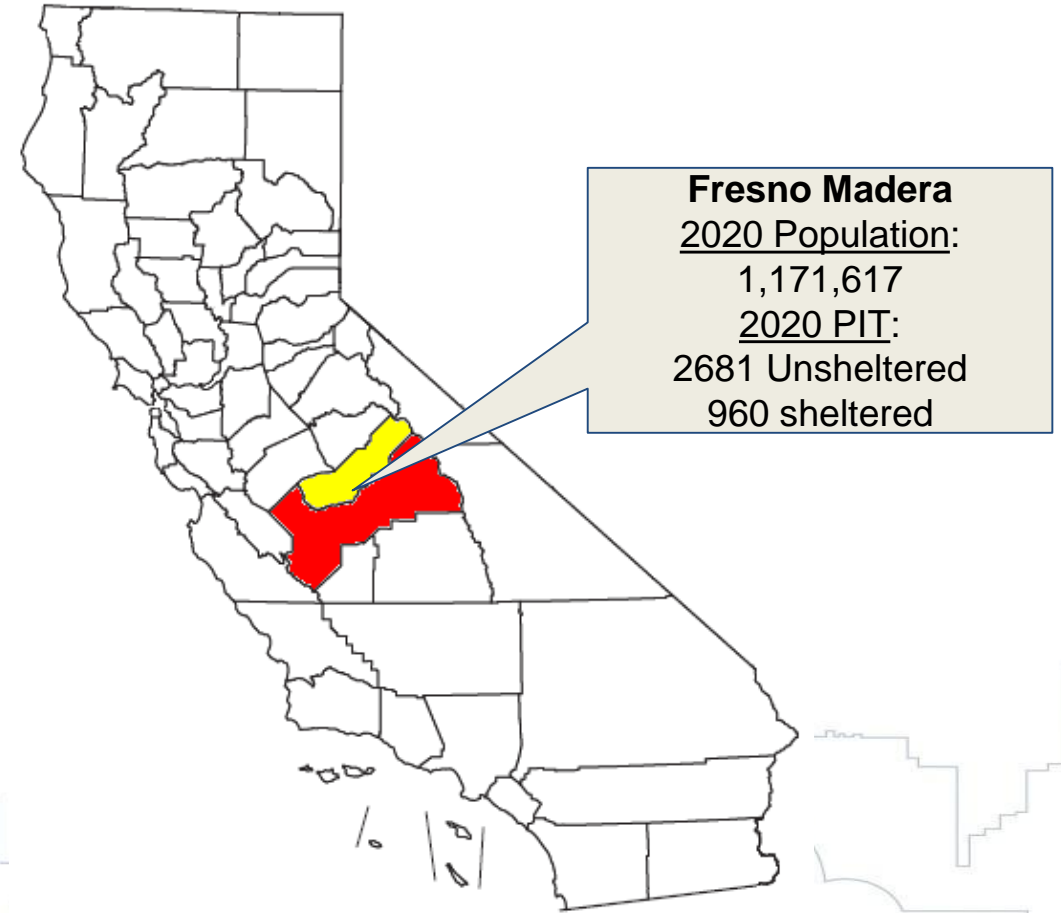
Meet the Presenters: Eric Gammons

- Associate, Technical Assistance Collaborative
- Current areas of work: HMIS capacity building, vendor procurement, HMIS governance and management, Regional HUD TA Point of Contact, SRC Stimulus 1 Coach,
- Previously: Over 30 years including CoC Manager/HMIS Lead/CoC, ESG, GPD provider/Disaster response



Meet the Presenters: Melissa Mikel

- Homeless Services Specialist, ICF International
- Current areas of work: HMIS Capacity building, analysis and visualization, and improving data quality.
- Previously: 10 years as HMIS Lead/System Administrator/Analyst/Data Diva in Fresno, CA



Important Project Setup Reminders

IMPORTANT

- No single project in HMIS may have more than one project type
- Onboarding procedure can save you many headaches
- Develop a strong relationship and constant 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

Project Setup Resources on HUD Exchange -
<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

Common Project Setup Challenges

1

PDDEs

2

Multiple Funding
Sources

3

New/demo
funding sources

4

Multiple
Sub recipients

5

Project Type
Changes

6

Project Closures,
Consolidations & Transferring

7

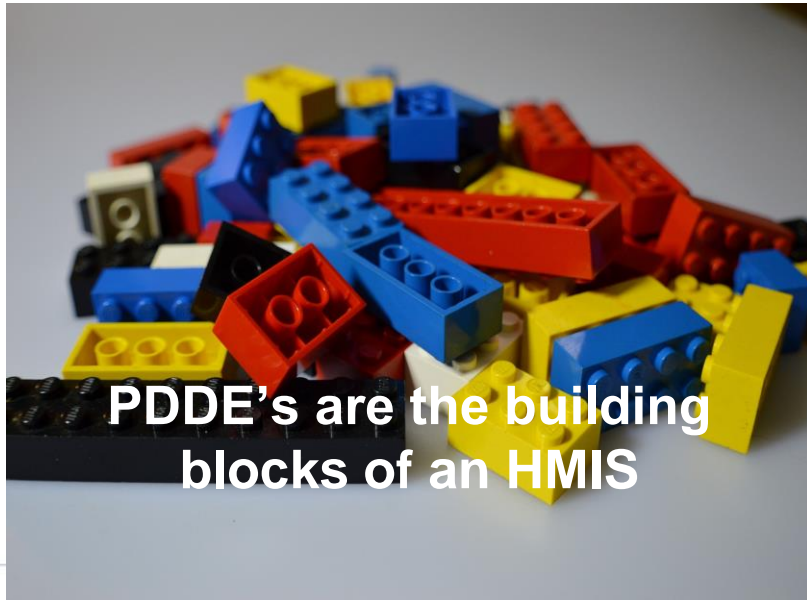
Reporting

8

Comparable
Database



Project Setup Challenges: PDDE's



They enable the HMIS to:

- Associate client-level record 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

Avoiding Project Setup Challenges: Relationships

- Relationship with CoC, recipients, providers, users, etc. are KEY!
- Refrain from “HMIS lingo” and teach “HMIS lingo”
- Review their grant/scope of work
- “Step away” from your desk to meet with the provider, what does their operation look like?
- Make resources easily accessible



Making HMIS personable will save you time with reporting issues, especially the LSA's.

POLL QUESTION : Bed and Unit Inventory

Situation #1 - ES project originally had 10 units with 20 beds. A large family entered the project and now there are 25 beds in use.

Situation #2 - A fire occurred in a PSH apartment building with 20 units. The fire severely damaged 6 units which won't be available for occupancy for at least 6 months.

In which situation(s) will bed and unit inventory need to be updated?

- A. Situation 1 only**
- B. Situation 2 only**
- C. Situation 1 and 2**
- D. None**

Project Setup Challenges: Infectious Disease Outbreak

HMIS considerations for ES inventory adjustments to prevent the spread of infectious disease.

- A year into COVID-19 pandemic, most systems have non-congregate shelters set up in HMIS
- HUD Exchange:
 - [COVID-19 HMIS Resources](#)
 - [HMIS Project Setup and Inventory Changes](#)

Project Setup Challenges: Infectious Disease Outbreak

Scenarios for Emergency Shelter inventory changes

- Moving beds temporarily to prevent the spread of infectious disease
 - No change necessary in HMIS; continue entry/exit as if still in shelter
- Adding new inventory dedicated for people experiencing homelessness
- Adding new inventory **NOT** dedicated for people experiencing homelessness
- Reducing existing inventory

Project Setup Challenges: Multiple Funding Sources


Some projects may receive funds from multiple funding sources for different eligible activities.

- Verify that funding sources can be combined in a single project using the project set up tool.

<https://www.hudexchange.info/resource/4898/hmis-project-set-up-tool/>

- Examples of when you *cannot* combine multiple funding sources in one project:
 - Verify that funding sources can be combined in a single project using the project set up tool.

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.

Reset choices

Federal Program 1:

Federal Program 2:

Federal Program 3:

HUD: ESG – Rapid Rehousing

HUD: ESG – Rapid Rehousing

N/A

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

1st Component's Project Type:

2nd Component's Project Type:

3rd Component's Project Type:

PH - Rapid Re-Housing

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:	Funding Program 2:	Funding Program 3:
	HUD: ESG – Rapid Rehousing	HUD: ESG – Rapid Rehousing	
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	

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 cost 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 Setup Challenges: Multiple Funding Sources

- New initiatives related to Consolidated Investment Planning may present project setup challenges (e.g. Centralized Rent Administration Program)
 - It is critical for HMIS staff to participate in these conversations to ensure that HMIS project setup, reporting, etc. is considered *from the beginning*.
 - Important items to consider
 - Funding source(s)
 - Reporting requirements
 - Project type(s)

Project Setup Challenges: 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:

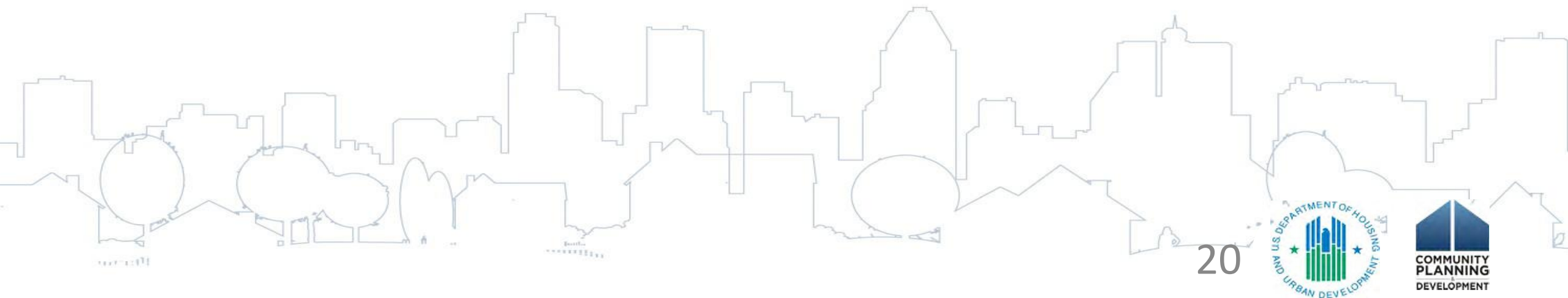
- The *Project Type* (data element 2.02) will be the appropriate residential project type (e.g., TH, PSH, etc.), and the *Federal Partner Funding Sources* (data element 2.6) will identify both funding sources / component types for the project

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

- CARES Act (ESG-CV)
 - ESG-CV-funded HP and RRH projects **must** be setup as new projects in HMIS.
 - SO projects funded by multiple ESG-CV jurisdictions **must** have separate projects setup in HMIS.
 - Temporary ES projects **must** have new projects setup in HMIS
 - Ongoing ES projects newly funded with ESG-CV do NOT have to have new projects setup



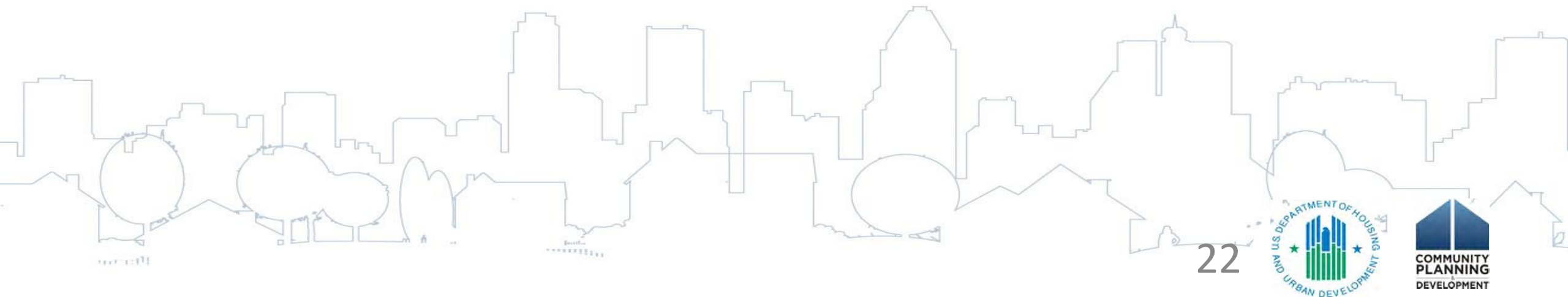
Project Setup Challenges: New/Demo Funding Sources

- 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 Challenges: Multiple Subrecipients

If setting up multiple subrecipients ensure:

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



Project Setup Challenges: 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 Challenges: Consolidating & Closing Projects

- There are a variety of circumstances that may require a client or a group of clients to be moved from one project to another project in HMIS.
- When project or client transfers are needed, the HMIS system administrator and the recipient entities involved must collaborate to determine best course of action prior to the end of an operating year.
 - Considerations must include scope of the transfer, cost and staff resources involved, and data quality impacts associated with different methods.

Project Setup Challenges: Consolidating & Closing Projects

- Four methods available for consideration in the “[Grant Consolidation and Closing Projects](#)” on the HUD Exchange.
- Choose the method that best addresses resource availability, data quality of performance measures, and required reporting completion.
- Notes and other documentation should be kept on file for auditing purposes and to explain any data discrepancies that may arise in future report submissions.

Project Setup Challenges: Consolidating & Closing Projects

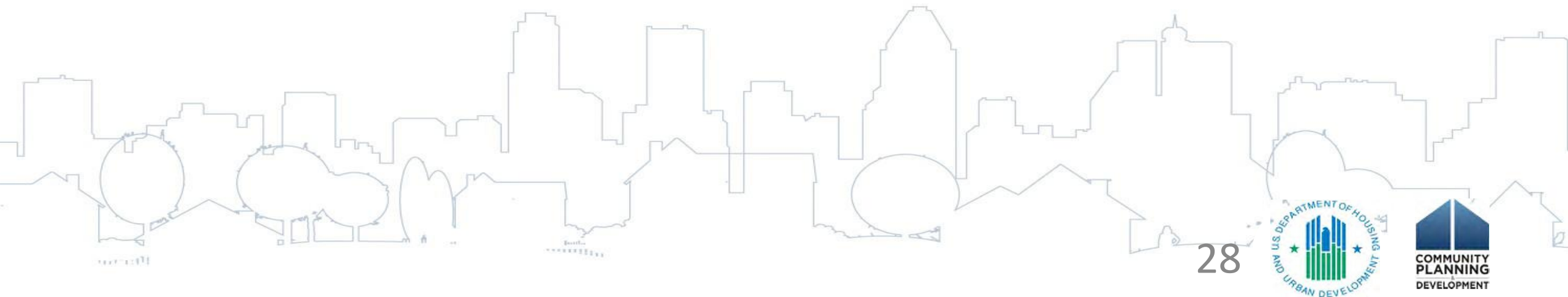
- Client Transfer Method 1
 - Administratively move complete client records from one project to another in HMIS
 - A client record is “selected” by the system administrator and “moved” to a different project.
 - All of the history of the client in a project and the integrity of the client’s project record remains intact.
 - System administrators should be aware of all historical recordkeeping implications using this method, including bed inventory implications.

Project Setup Challenges: Consolidating & Closing Projects

- Client Transfer Method 2
 - Exit client from one project and start in another project
 - This method is typically employed when a client exits one project type for another project type (e.g. emergency shelter to RRH) but may also be used for recording a client's move from one project type to another with the same project type (e.g. PSH to PSH).
 - 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.
 - There are implications for project-level and system-level reports with this option, particularly when clients participating in one PH project are exited and started in another PH project.

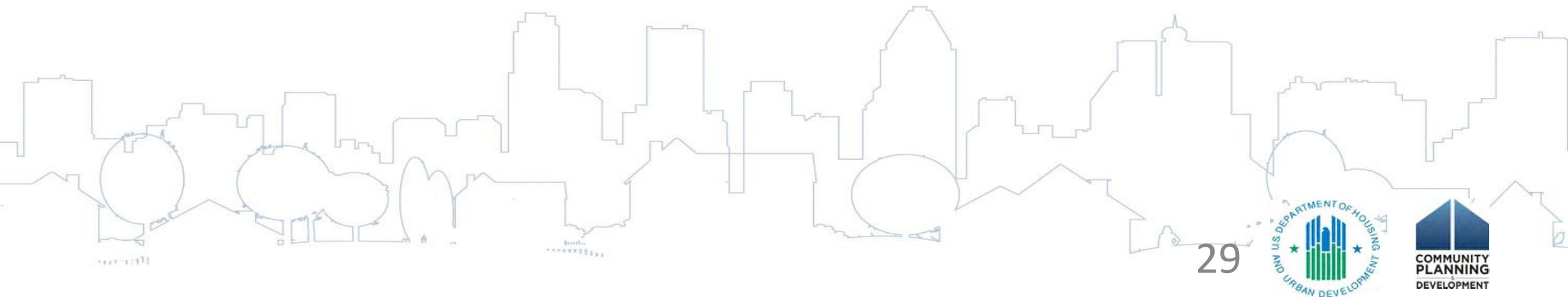
Project Setup Challenges: Consolidating & Closing Projects

- Project Transfer Method 1
 - Reassign the project to the new recipient in HMIS
 - 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 Challenges: Consolidating & Closing Projects

- Project Transfer Method 2
 - Leave existing projects in HMIS
 - If a single organization is operating projects where a grant consolidation occurs, there is no requirement that the projects in HMIS change.



Project Setup Challenges: HMIS Reporting

- Identify problems or issues *before* the project begins operating and reports are due
- Project types in HMIS must align with reporting requirements
 - Sage will not accept a CSV 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 and PDDEs
- Incorrect project typing may result in missed data collection requirements

A Key to Successful HMIS Reporting: Relationships

- Just as relationships are the key to accurate PDDEs, they are critical to successfully submitting HMIS-based reports
- Reporting is the conduit between project work and its funders
 - Our role is not simply to assume we know what's true and build out our database in a vacuum, but assist in reflecting real-life conditions as accurately as possible to the Federal Partners
 - Collaboration is critical to ensure:
 - Reports include the correct projects
 - Projects are collecting the right information

Project Setup Challenges: 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.

Community Spotlight

A photograph of a wooden floor with two bright spotlights shining down from above, creating a dramatic effect with rays of light.

Andrew Zegura
Statewide HMIS Administrator
Catholic Charities of Acadiana, Inc.

Meet the Presenters: Andrew Zegura

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Project Setup Examples

- Non-congregate Sheltering
 - Need for something to be set up quickly to record data
 - Experienced HMIS Data Entry Case Workers
- Rental and Utility Assistance
 - Need for Data Sharing.
 - Expenditure reconciliation with Services

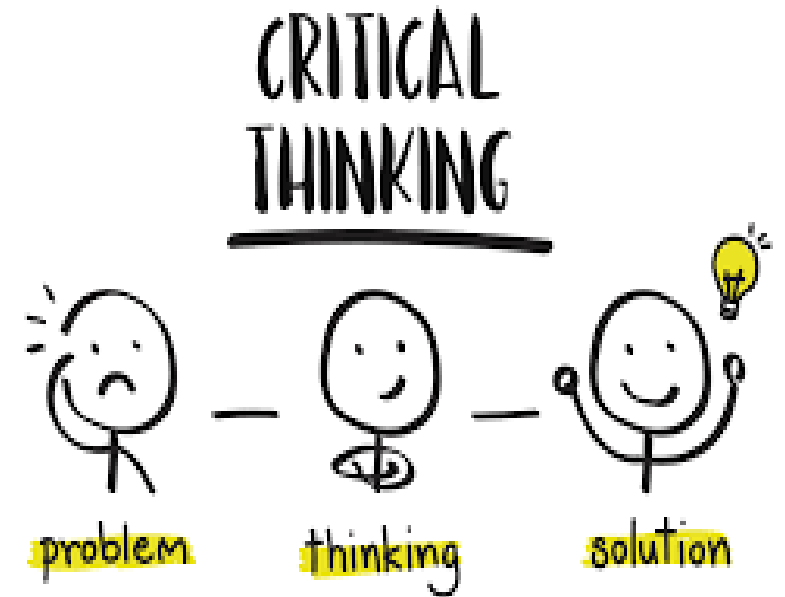


Non-congregate Sheltering Project Setup

- Who, What, Where, When, Why, and HOW?
(While all are important questions, I only have time to focus on the How in this list)

HOW?

- Challenges
 - PDDE's, Funding, Reporting, Multiple Hotels, Multiple Agencies
- Our Solutions
 - PDDE's – ES Sheltering Setup and more....
 - Multiple Hotels/Agencies – Easy Workflow
 - Funding – Determining data to capture
 - Reporting – ESG CAPER and Custom Reports

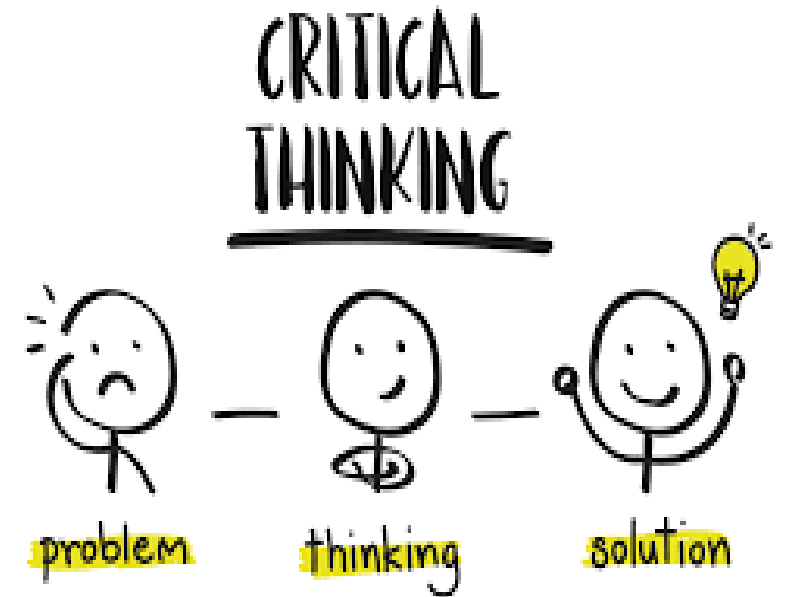


Rental and Utility Assistance Project Setup

- Who, What, Where, When, Why, and HOW?
(While all are important questions, I only have time to focus on the How in this list)

HOW?

- Challenges
 - Multiple Agencies Sharing Data, Service Tracking, Reporting
- Our Solutions
 - Multiple Agencies – Simplified Workflow and Data Sharing Agreements Setup
 - Service Tracking – Rental type, amounts
 - Reporting – Custom Report



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.

Questions

