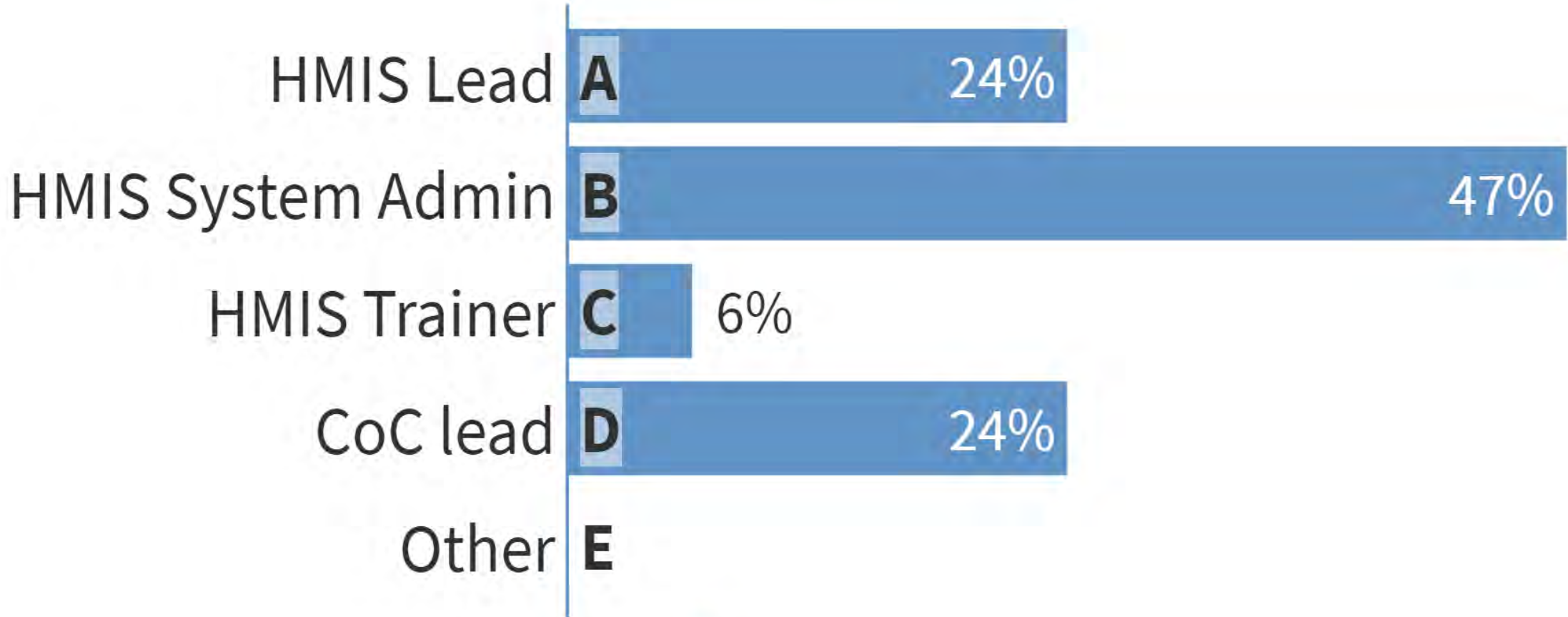# Project Set Up 201

Presenters
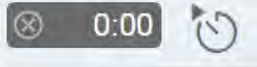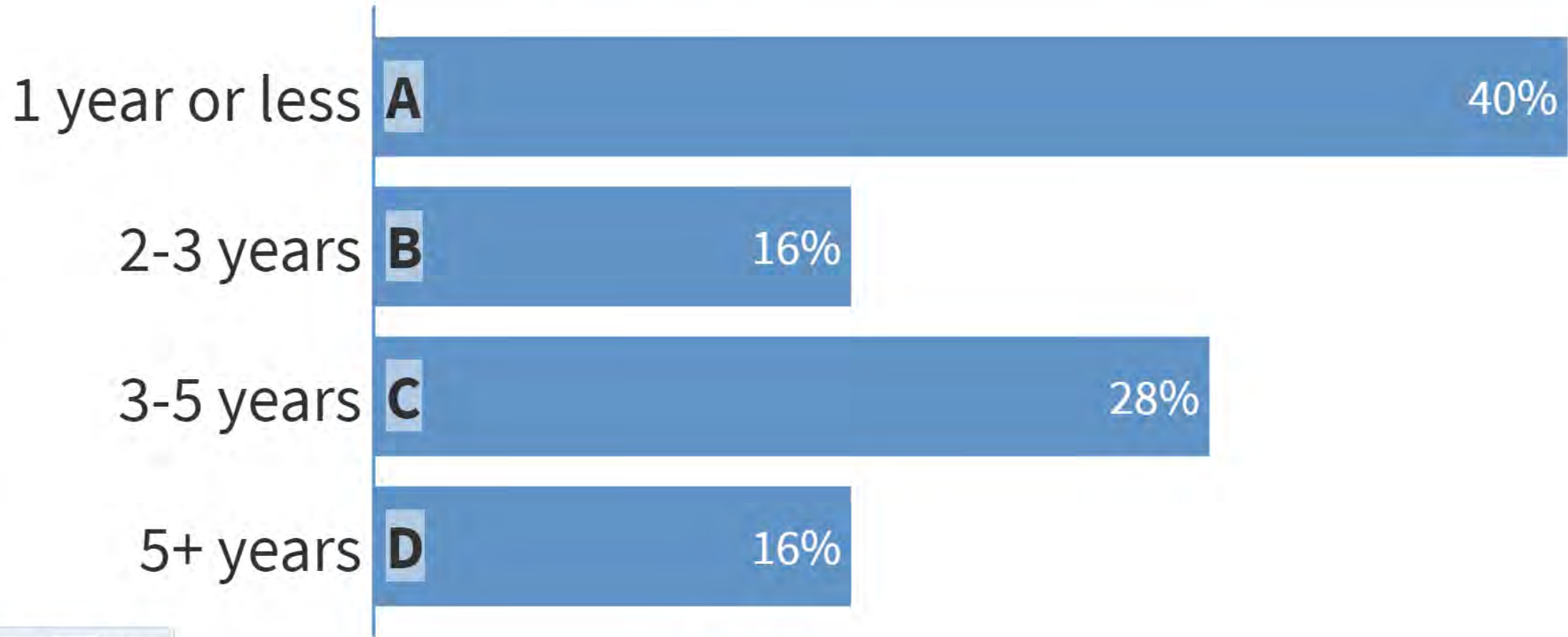**Joan Domenech, Corporation for Supportive Housing**
Meradith Alspaugh, The Partnership Center

Which of the following roles represent you ?

Role		Percent
HMIS Lead	A	24%
HMIS System Admin	B	47%
HMIS Trainer	C	6%
CoC lead	D	24%
Other	E	

Poll Everywhere

How long have you been in that role?

| Role Duration	Percentage
1 year or less **A**	40%
2-3 years **B**	16%
3-5 years **C**	28%
5+ years **D**	16%

Learning Objectives

- Identify the proper project set up structure

- Review identified common challenges for completing HMIS project setup

- Provide attendees with key considerations for more advanced HMIS project set up and possible solutions for common challenges

- Learn about resources available for project set up

- Understand impacts of incorrect project set up

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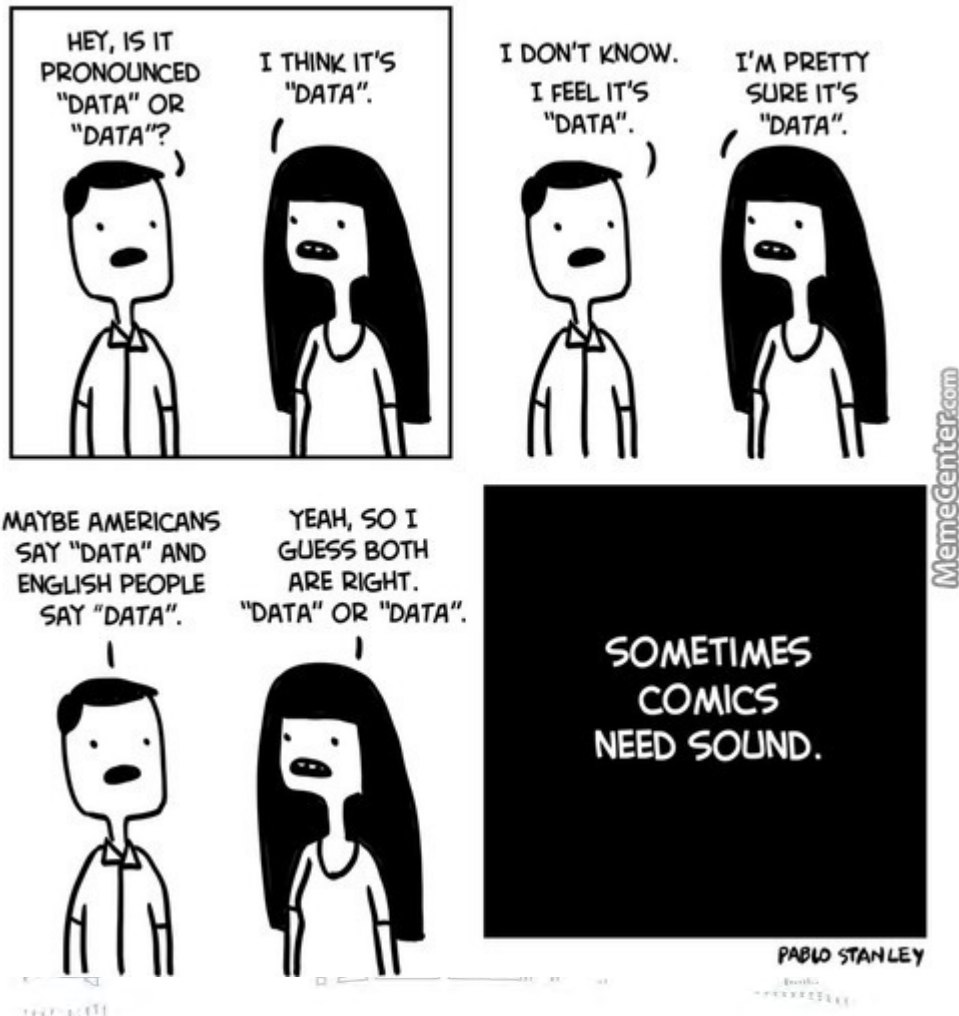
- COO, The Partnership Center, Ltd.
- Current areas of work: HMIS Data Lab-focused on HMIS Software Providers, System Administration, HMIS Data Standards, work with federal partners, and Sage
- Previously: Case Management, Program Supervision, CoC Leadership

Things to Consider for HMIS Set Up

- **Consult with organization administering the project and the CoC Lead Agency regarding appropriate responses for PDDEs**
    - *Project Type* (data element 2.02) and *Funding Sources* (data element 2.06) are particularly critical.

- **Understand the reporting requirements for each project in the HMIS**
    - This is critical! It's better to take the time to set up a project correctly than have to come back and fix it later.

Project Set Up Relationship to Reporting

- It's better to identify problems or issues now than to wait until it's time to produce reports.

- Sage will not accept a CSV upload for a project type different than the project type funded.

- Incorrect project typing may result in missed data collection requirements.

- If an issue is identified, work with your HMIS vendor to ensure any changes to set up will not eliminate historical data.

Project Set Up Resources

| 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

Updated and simplified Project Descriptor Data Elements

- Organized elements by:
    - Organization Information
    - Project Information
    - CoC Information
    - Funding Sources
    - Bed and Unit Inventory Information

- REVIEW YOUR PDDEs!

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 **A** — 38%

No **B** — 63% ✅
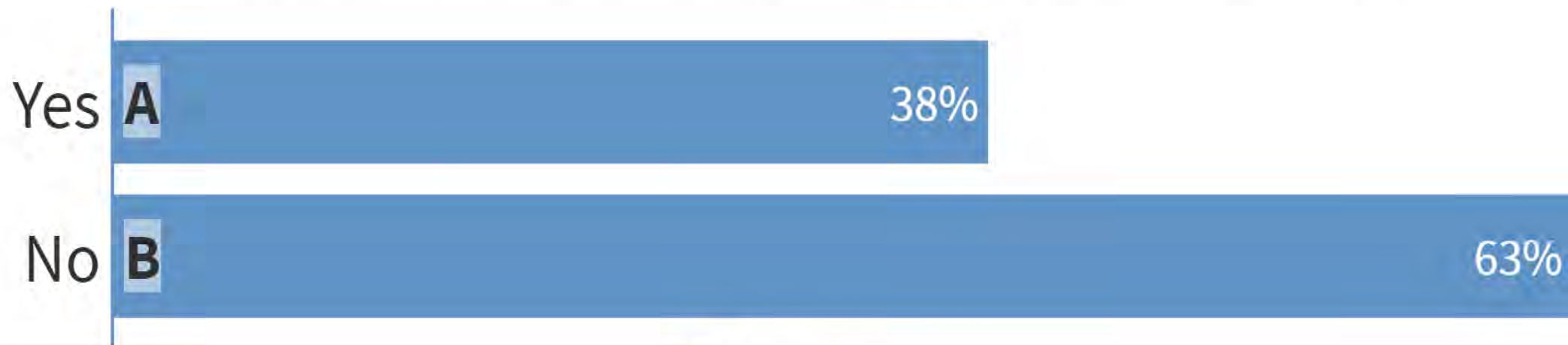
Poll Everywhere

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?

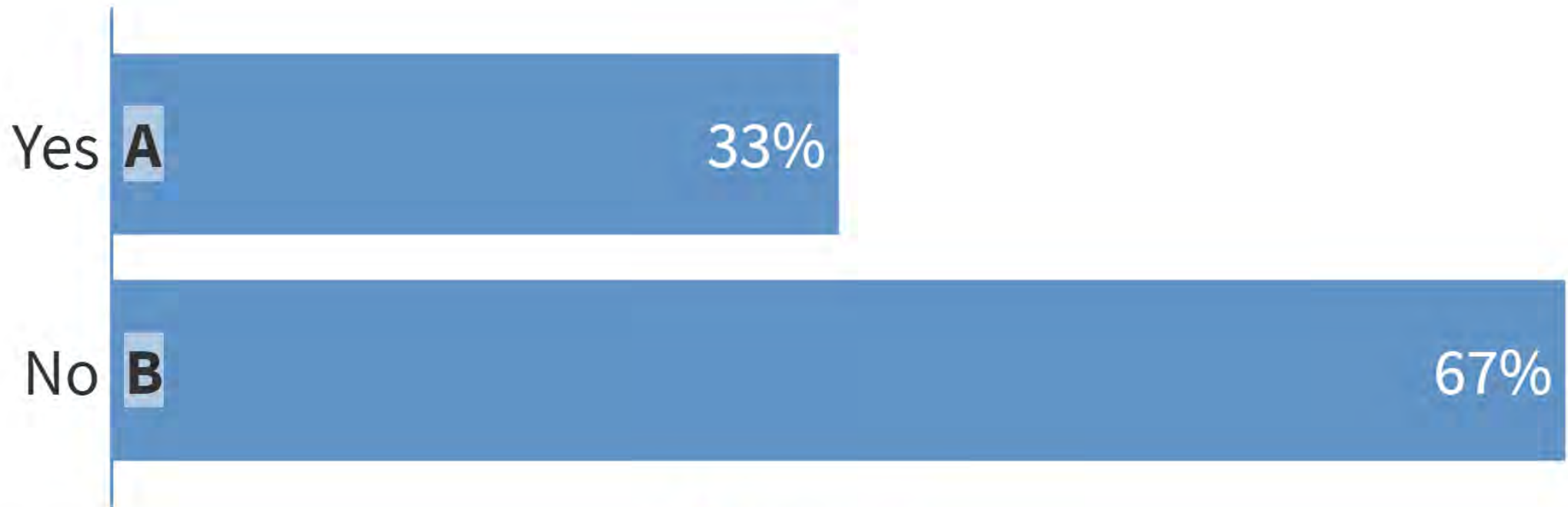|		
Emergency shelters with more than one bed availability (year-round, seasonal, overflow) or bed type (facility-based, voucher, other) must have separate records for each Bed Type, and Availability	**A**	48% ✓
Emergency shelters with more than one bed availability (year-round, seasonal, overflow) or bed type (facility-based, voucher, other) can be one project in HMIS.	**B**	52%

Poll Everywhere

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

A: No. The Bed and Unit Inventory Information only needs to be updated if there are significant changes in project operations.

Type of "change"	Update needed in Bed and Unit Inventory?
ES project originally had 10 units with 20 beds. A large family entered the project and now there are 25 beds in use.	No – this is a minor fluctuation in project operations.
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.	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.
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.	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.

Common challenges for completing HMIS project setup

1. Setting up <u>multiple projects</u> under a single funding component

2. Setting up a single project that has <u>multiple funding</u> components

3. Setting up a Joint Component Project

4. When and how to set up a Services Only Project

HMIS Project Types

No single HMIS project record may have more than one project type!
What are the project types?

- Emergency Shelter
- Transitional Housing
- PH – Permanent Supportive Housing
- PH – Rapid-Rehousing
- PH – Housing only

- PH – Housing with services
- Services Only
- Safe Haven
- Street Outreach
- Homeless Prevention

Each Project Type must have its own HMIS Project set up

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Setting up multiple projects that have single funding component

Examples:

- HUD Joint Component TH-RRH projects

- PATH projects providing both street outreach and supportive service (case management)

- SSVF Rapid Rehousing, Homelessness Prevention, & Problem Solving/Rapid Resolution

Setting up a single project that has <u>multiple funding </u>components

Reasons a single component requires multiple HMIS projects set up

- Single project is funded by multiple funding sources

  - Rapid Rehousing funded by multiple ESG jurisdictions
  - Residential grant and services only grant
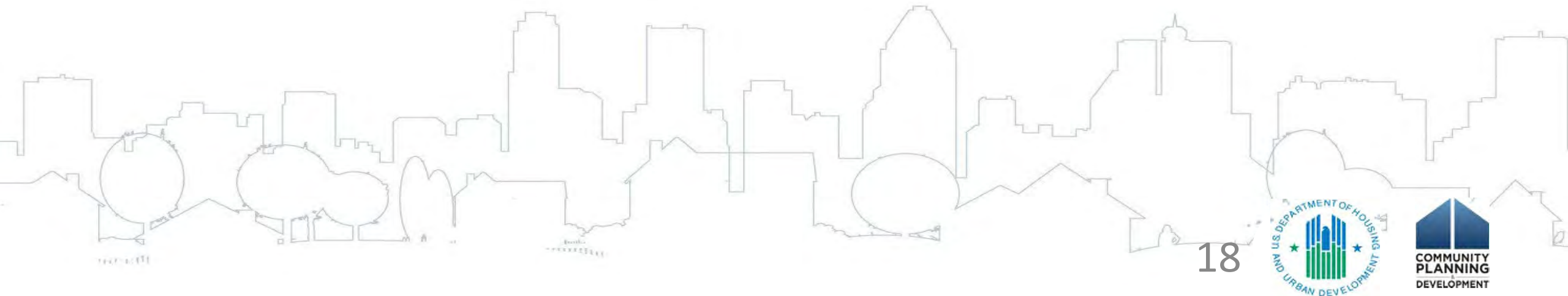
Project Set Up: Multiple Funding Sources

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.

Joint Component Projects

- **TH-RRH Joint Component Set Up**

Project 1 – TH
Use 2.06 –Funding Source HUD: CoC – Joint Component TH/RRH

Project 2 – RRH
Use 2.06 –Funding Source HUD: CoC – Joint Component TH/RRH

- TH clients must have a start date in the RRH project **on the same date**
  - RRH clients who then move into housing get a move-in-date
- At the time of each enrollment be sure to capture **accurate** HMIS data (Prior Living Situation, Destination, Project Exit Data

https://files.hudexchange.info/resources/documents/CoC-Program-Joint-Component-Funding-Project-Setup-and-Reporting-in-HMIS.pdf

SSO Project Set Up: specialized projects

- For an SSO whose primary work is street outreach, use the HMIS Project Type "Street Outreach."

- For an SSO that operates a Coordinated Entry/Assessment project funded under the CoC Program, use the HMIS Project Type "Coordinated Entry."

- For a SSO that is a standalone supportive service, use the HMIS Project Type "Other."

Let's talk about SSOs that could be affiliated with housing projects:

ONE Housing Project

& either does not offer to provide services for all of the residential project clients
or only serves clients for a portion of their project stay (e.g. provides classes)
or information sharing is not allowed between residential project and service provider

Multiple residential projects of the same Project Type

& either does not serve all of the all residential project clients
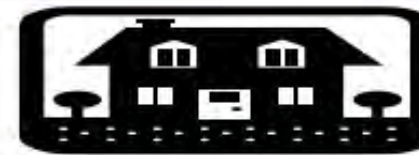**or** information sharing is not allowed between residential projects and service provider.

RRH   PSH

Multiple residential projects of a different Project Type

Affiliated with Emergency Shelter(s)

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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:

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:

Element	Funding Program 1: **HUD:ESG – Rapid Rehousing** Required Element	Funding Program 2: **HUD:ESG – Rapid Rehousing** Required Element	Funding Program 3: 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	

Consolidating PSH 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. Recipients may also consolidate grants under the FY 2019 Competition

HUD released A Blueprint for Understanding How They Work in early 2019.

Project Consolidations in HMIS - Example

Example 1

CoC A has 3 PSH grants that have been approved to consolidate into one grant.

Grant Number	Grant Type	Operating Start Date	Operating End Date	Units	Beds	CH Dedicated Beds	Award
Grant Number XX0180L4H021705	Grant Type PH	Operating Start Date 4/1/2018	Operating End Date 9/31/2019	Units 10	Beds 10	CH Dedicated Beds 10	Award $126,178
XX0080L5H021706	PH	7/1/2019	6/30/2020	32	29	16	$909,821
XX0170L5H021701	PH	12/1/2018	11/30/2019	6	6	6	$85,826

Project Consolidations in HMIS - Example

Example 1 - continued

Expiring Grants	Grant Type	Operating Start Date	Operating End Date	APR Due Date	Date grant changes to draw funds from the new consolidated grant
XX0180L4H021705	PH	4/1/2018	3/31/2019	6/29/2019	4/1/2019
XX0005L5H021703	PH	7/1/2018	6/30/2019	9/28/2019	7/1/2019
XX0170L5H021701	PH	12/1/2018	11/30/2019	2/28/2020	12/1/2019
New Consolidated Grant	Grant Type	Operating Start Date	Operating End Date		
XX0180L4H021806	PH	4/1/2019	6/31/2020	9/28/2020	NEW consolidated grant full operating year (15 months)

Project Consolidations in HMIS - Example

HMIS Recommended Procedures:

1. The recipient must generate the APR for each terminating project (those moving into the consolidated new grant) as soon as possible after the operating end date so the client records may be moved. Check the APR carefully for errors/omissions. **Once the records are moved in the HMIS the APR will not be able to be regenerated.**

2. The project in the HMIS which is associated with the surviving grant becomes the "home project" for the new grant.

3. On the date a terminating grant changes to the new grant **all new clients** of the terminating grant project should be entered into the new grant "home project". This prevents duplicate clients or enrollments from being created in the HMIS.

4. After the APR for each expiring grant is complete and reviewed the HMIS should move all open records (i.e. stayers who did not yet have an exit date prior to the operating end date of the grant) to the new "home project" in the system. This maintains all client data to remain intact for length of stay, eligibility, time from start to move-in and other critical data.

Comparable Databases

- A comparable database must be compliant with HMIS Data and Technical Standards for all required Project Descriptor, Universal, and Program-Specific data elements for any project as identified in this manual and in the HMIS Data Dictionary, as well as all HUD-defined standards for security, privacy, software functionality, and data quality.

- A comparable database **must** be able to generate a CSV-CAPER and CSV-APR Report.

Comparable Databases

- Projects must enter client-level data; entry of aggregate data is not sufficient.

- ESG- and CoC-funded providers using a comparable database **must** follow the same HMIS project typing rules as noted in the HMIS Data Standards.

- Client data entered into a comparable database by victim services providers must not be entered directly into or provided to HMIS.

Not sure if a project should be set up in HMIS or Comparable Database?

Use HUD's HMIS Comparable Database Decision Tree

Questions?

Activity

- What are some frequent issues you face with setting up new HMIS projects?

- What strategies did you use to address these issues? Any lessons learned?

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.

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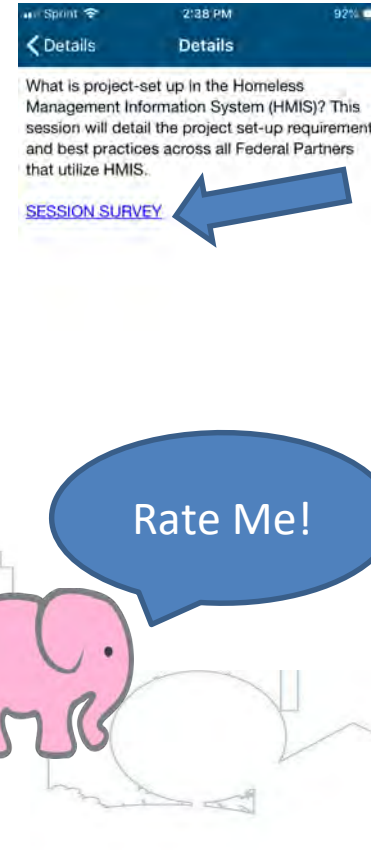## (It takes 5 minutes to complete)
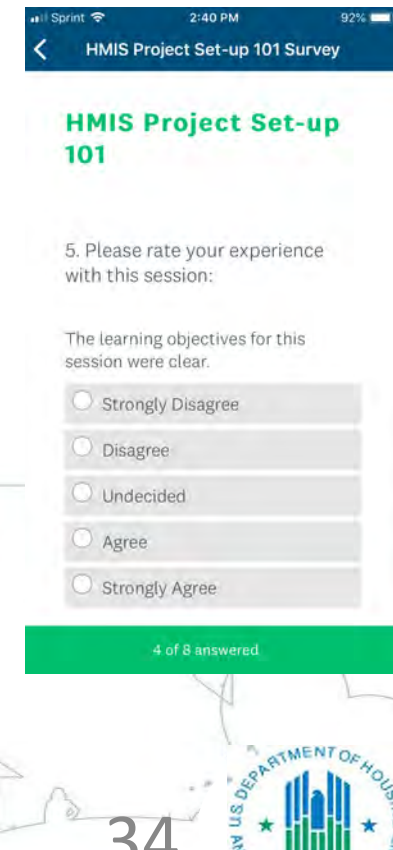
1) Select the name of the session from the agenda tab.
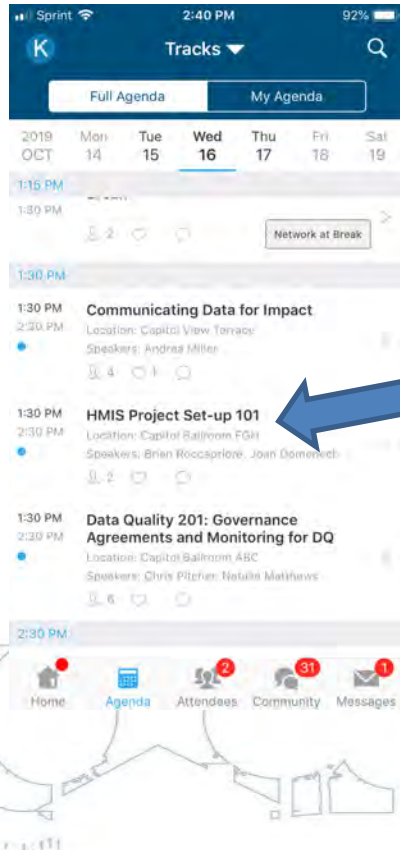
2) Select "See More" under the Overview.
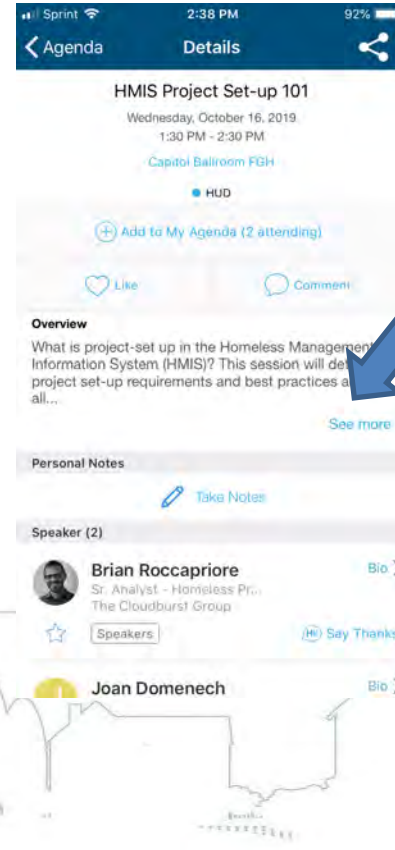
3) Select "SESSION SURVEY" under Details.

4) Complete the Evaluation and Select "Done".

Rate Me!

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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